

Aberdeen City and Aberdeenshire Retail Study 2013

Final Report:

Executive Summary

October 2013

reference:

Contact: **Keith Hargest**

Tel: **0131 443 8813**

Email: **keith.hargest@btconnect.com**

Contents

1	Introduction	1
2	Overall Study Approach	2
3	Trends in Retailing	4
4	Retailing in Aberdeen and Aberdeenshire	6
5	Retail Deficiencies and Floorspace Strategy	14
6	Recommended Retail Strategy	16

Ordnance Survey plans contained in this report reproduced under license 100040565

1 Introduction

- 1.1 This Aberdeen City and Aberdeenshire Retail Study (ACARS) has been prepared to provide an up to date assessment of retail provision within Aberdeen City and Aberdeenshire and to provide an assessment of potential future demand and supply for retail floorspace within this area for the next 15 years or so. The primary purpose of this assessment is to provide a basis for the development of plans and proposals for retail and related activities in the Strategic Development Plan and Local Development Plans being prepared for the Aberdeen City and Aberdeenshire planning authority areas.
- 1.2 The study has undertaken the following:
- The preparation of a Strategic Retail Model (“SRM”) for the period to 2027 using up to date retail data.
 - Identified recommendations for a retail strategy with the principal focus on the city and settlements within the Aberdeen Housing Market Area. This strategy includes:
 - addressing retail deficiencies in existing urban areas;
 - identifying retail floorspace to serve new and expanded urban areas;
 - the future growth of the City Centre;
 - consideration of specific retail sectors and other factors; and
 - a framework for emerging development plans.

2 Overall Study Approach

2.1 The Study has been undertaken using a range of techniques and data sources. The principal techniques used for the Study are:

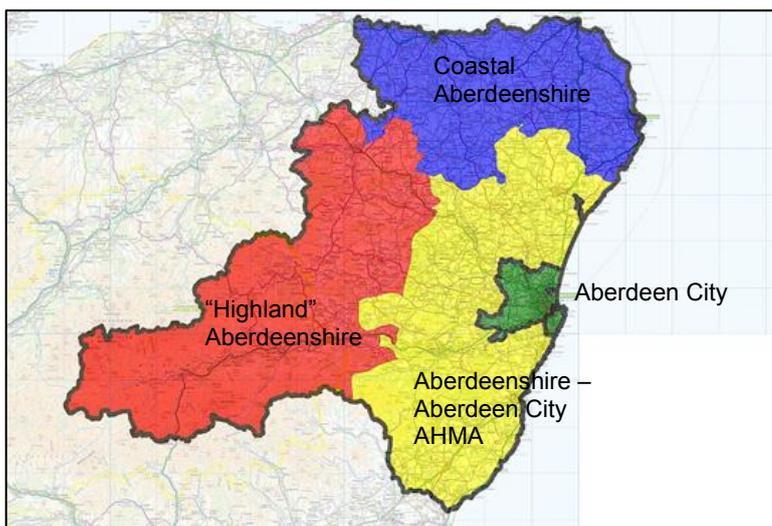
- Data review: existing and future population; existing retail and retail service floorspace; existing and future available expenditure forecasts; and tourism expenditure.
- Household survey.
- Review of long term market trends.
- Development of the Strategic Retail Model (SRM) – including the use of sensitivity tests and development scenarios.
- Review of existing retail centres – including surveys and town centre health checks (vitality and viability).

Data Sources

2.2 The principal sources of information used for the study include:

- Floorspace data from the Grampian Assessor.
- Scottish Neighbourhood Statistics for baseline population (adjusted to 2011 Census data).
- Pitney Bowes Business Insight AnySite reports for data on available expenditure by different retail goods categories. This has been obtained for four sub-regions of the study area – shown in Figure 1.

Figure 1: Location of Study Sub-Regions



- Expenditure growth forecasts have used forecasts produced by both Pitney Bowes Business Insight (trend forecasts and Oxford Economic Forecasts) and Experian.
- Tourism data from VisitScotland, UK and Scottish National Statistics and other related sources. This identified occupancy rates, visitor numbers and expenditure.

Household Survey

- 2.3 A key component for accurately understanding the operation of retail patterns and estimates of actual retail turnover is the use of extensive and detailed surveys. An extensive household survey has been undertaken to establish both behavioural and attitudinal information about retail habits within the study area. The design of the survey was undertaken jointly by Hargest Planning Ltd and RMG Clarity and was implemented as a telephone interview survey by RMG Clarity in May 2013. In total 3000 interviews were completed reflecting the distribution of population and the zones used in the Strategic Retail Model.

Strategic Retail Model

- 2.4 The purpose of the Strategic Retail Model is to provide an analysis of the balance between demand and supply for retail expenditure/turnover within the study area for the period 2013-2027. The model is an update of the Aberdeen and Aberdeenshire model that was prepared for the 2004 retail study. The model identifies actual turnover levels achieved in existing/future floorspace.

3 Trends in Retailing

- 3.1 For the period up to 2008 it was evident that a series of long term trends, that had been in place for a number of decades, had resulted in reduced retail unit numbers but increased retail floorspace. However the recent recession that commenced in 2008 appears to have had particular adverse impacts on the retail sector and, in combination with wider societal and technological changes, has led to broader questioning of the future role of retailing and the potential for future investment in new floorspace.

Long Term Retail Trends

- 3.2 Retailing is one of the most dynamic and rapidly changing sectors within the national economy and that change has been a continuous feature since the 1950s. This has led to both growth in terms of total retail floorspace and turnover combined with market concentration into larger units, larger retail centres and larger businesses. However following the recession that commenced in 2008 it has become apparent that there are additional factors which will have significant implications for the future of retailing and the locational and space requirements for retail outlets. These recent factors include:

- The role of future economic growth and, linked to this, the growth of available expenditure for retail. Current forecasts are that expenditure growth will resume but this is expected to be at slower rates than were experienced up to 2008.
- The impact of the internet (including use of the internet from mobile devices) and other technology changes on retail operations and shopping habits.
- Changing demographics and lifestyles affecting demand for different retail sectors.

- 3.3 The key factors underpinning the growth of retail over the next 15 years can be summarised are as follows:

- The fundamental business requirements will remain – to maximise business profit through balancing income with costs. Slower growth in retail expenditure will question the pursuit of maximising income at all costs with the result that businesses, especially multiples, will pay greater attention to the control of costs, especially those associated with peripheral retail locations, to achieve maximum profit.
- Long term real growth in retail expenditure will occur but at lower rates than seen up to 2008. This will translate into reduced floorspace expansion although total retail floorspace requirements, particularly in the larger centres, will be expected to continue to grow.
- Increasing economic wealth will result in increased competition between retail and other sectors. This will result in increasing proportions of town centre space devoted to retail and leisure services rather than retail goods floorspace. The ageing of society will reinforce this tendency.
- Personal mobility will continue to increase and be a key factor supporting market concentration in larger retail centres at the expense of smaller retail centres.
- The role of the internet will have significant impacts on future floorspace requirements. The internet will take an increasing share of total expenditure (at least until 2020). Furthermore new models of retailing,

utilising technology, are expected to result in reduced sales area requirements – this applies whether internet sales are by delivery, “click and collect” or virtual stores. The very rapid rate of technological development introduces considerable uncertainty in forecasting the effects that this will have on retail operations.

3.4 These trends will have the following implications for floorspace requirements in the study area:

- There will be a continuation (and possibly even acceleration) towards market concentration in the largest centres. This is likely to benefit Aberdeen City Centre. It is not clear whether the next tier of centres within the region will benefit or lose from geographical concentration. Within Aberdeenshire rapid population growth and recent market success in Inverurie is likely to support future investment whereas more peripheral or smaller centres are less likely to benefit. In smaller centres older floorspace will be less attractive to multiples.
- In smaller traditional town centres the long term retail potential is expected to be limited. Centres may benefit from supermarket investment (either new stores or extension to stores to improve the non-food offer) but significant new investment in retail goods floorspace will be comparatively limited. This has significant implications for these centres to identify a clear role for their future viability.
- The position regarding retail warehouse space is less certain. Bulky goods retail will remain dependent upon the housing market which will remain buoyant in the study area but the sector will also be affected by the wider UK market.
- As a result of new retail channels (such as internet based retailing) sales densities in existing floorspace in larger centres and retail warehouses are likely to increase. – i.e. the overall growth of new floorspace is expected to be at a rate lower than growth in available expenditure.
- The rate of growth of floorspace for convenience goods is expected to reduce. There will still be demand for areas that remain underserved at present which includes areas of major new housing development. There will, however, be continuing demand to diversify the retail offer in supermarkets to cater for a wider non-food offer and, in the larger units, retail services. Growth of small convenience-format stores by major operators is expected to continue to reflect modern lifestyles.
- Long term retrenchment by multiples will create some opportunities for local operators in smaller centres. In order to compete with the internet these businesses will succeed where they provide some or all of the following: unusual or specialist products that are difficult to identify or obtain from the internet; a very high level of that generates customer loyalty; a very attractive shopping/leisure environment that makes shoppers want to visit and spend; have a brand image that attracts certain groups of consumers (e.g. youth, sports etc); or are able to tap into pass by trade.
- In overall terms there is expected to be a loss of retail goods floorspace from traditional medium/smaller centres – particularly for comparison goods space. This will be a slow process and will, in part, be countered by increases in retail services.
- There will be continued opportunities for retail to be provided at specialist locations – notably transport hubs, sports, leisure and tourist locations.

4 Retailing in Aberdeen and Aberdeenshire

Overall Distribution of Retail Floorspace

- 4.1 Table 2 provides a summary of retail floorspace and turnover, by principal retail goods category, for Aberdeen City and Aberdeenshire. It also identifies the floorspace located in existing town and district centres used for retail services and vacant floorspace.
- 4.2 The Table shows that the total retail provision within Aberdeen City and Aberdeenshire is as follows:
- There is 722,882 sq m retail goods floorspace. This comprises 223,881 sq m GFA convenience goods floorspace (31% of the total), 338,938 sq m GFA general comparison goods (47% of total) and 160,062 sq m GFA bulky goods (22% of total).
 - Total net (sales) floorspace is 478,089 sq m NFA i.e. the net area is, on average, 66% of gross floor area.
 - Total retail goods turnover is £2,381.7m per annum (2011 prices). Convenience goods turnover is 41% of the total, general comparison 49% and bulky goods 10%. It follows from this data that sales densities are highest for convenience goods and lowest for bulky goods.

Aberdeen City Centre

- 4.3 For this report Aberdeen City Centre is taken as the whole of the area identified as the City Centre in the Local Development Plan. This area therefore extends beyond the City Centre Business Zone. The total retail goods floorspace in the City Centre is 200,785 sq m GFA which is 27% of all retail goods floorspace in the City and Shire. Its retail goods turnover is estimated at £841.9m per annum – 35% of the total retail turnover of the study area.

Town and District Centres

- 4.4 Table 2 provides a breakdown of the floorspace for these centres including retail goods retail services, vacancies and retail turnover. In overall terms town and district centres are identified to account for 267,933 sq m GFA (i.e. larger than the City Centre) with turnover of £869.0m (marginally larger than the City Centre). These centres comprise 36% of retail floorspace and also 36% of turnover.

Supermarkets and Superstores

- 4.5 This category only identifies those supermarkets and superstores that are located outwith the City Centre, town centres and district centres. This includes supermarkets that are located in retail parks but not identified as district/town centres. This section of Table 2 shows that there are 22 stores identified in this category. These account for 64,406 sq m GFA (only 9% of all floorspace) and have a turnover estimated to be £345.6m (15% of all retail turnover). However they are, of course, much more significant in terms of convenience floorspace accounting for 22% of all convenience floorspace and 30% of all convenience turnover.

Table 2: Total Retail Floorspace and Turnover – 2013 – Aberdeen City and Aberdeenshire

	No.	Convenience			General Comparison			Bulky Goods			All Goods		
		GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m
City Centre	460	23522	14665	£83.40m	156429	101587	£698.28m	20833	13499	£60.23m	200785	129751	£841.91m
Retail Services	365	12%		10%	78%		83%	10%		7%	57215		
Vacant	66										13847		
Total	891										271847		
Town & District Centres													
1. Highland	116	5911	3785	£13.45m	8864	5757	£15.30m	5046	3280	£5.25m	19821	12822	£34.00m
Retail Services	63										5974		
Vacant	10										1338		
Total	189										27133		
2. Coastal	282	16604	10707	£45.39m	35845	23292	£68.30m	10880	7072	£14.35m	63329	41071	£128.04m
Retail Services	207										23909		
Vacant	49										4835		
Total	538										92072		
3. Aberdeenshire - Aberdeen HI	284	28511	18050	£126.40m	37602	25016	£103.06m	20725	14327	£29.15m	86838	57393	£258.60m
Retail Services	233										23815		
Vacant	20										3235		
Total	537										113887		
4. City	117	35967	21503	£281.17m	39425	25269	£126.17m	22554	15764	£40.99m	97945	62535	£448.34m
Retail Services	117										11729		
Vacant	17										2752		
Total	251										112427		
TOTAL TOWN & DISTRICT CENTRES	799	86992	54044	£466.41m	121736	79335	£312.83m	59205	40442	£89.74m	267933	173821	£868.98m
Retail Services	620										65426		
Vacant	96										12161		
Total	1515										345520		
Neighbourhood/Local/Rural													
1. Highland	41	1628	1058	£3.32m	3443	2238	£5.13m	574	373	£0.45m	5645	3669	£8.90m
2. Coastal	142	14399	16954	£15.21m	4648	3075	£7.95m	5008	3255	£3.90m	25269	24146	£27.06m
3. Aberdeenshire - Aberdeen HI	99	19703	12923	£80.68m	5665	3598	£16.54m	11135	6996	£13.47m	35940	23517	£110.70m
4. City	356	26689	17348	£40.40m	17551	11408	£28.03m	12908	8390	£10.99m	57148	37146	£79.42m
TOTAL	638	62418	48283	£139.61m	31307	20319	£57.66m	29625	19015	£28.81m	124002	88478	£226.08m
OOO Supermarkets/Superstores													
1. Highland	4	7008	4326	£33.26m	2454	1472	£6.39m	377	226	£1.38m	9839	6024	£41.03m
2. Coastal	6	14506	8970	£89.61m	4227	2609	£16.44m	757	446	£1.73m	19490	12074	£107.78m
3. Aberdeenshire - Aberdeen HI	3	12030	7343	£72.00m	1452	891	£5.36m	237	154	£0.58m	9780	5828	£77.94m
Inc Conv part of Costco													
4. City	9	17405	11291	£95.09m	6652	4073	£20.65m	1239	714	£3.09m	25297	16079	£118.82m
TOTAL	22	50949	31930	£289.96m	14785	9045	£48.84m	2610	1541	£6.78m	64406	40004	£345.58m

Table 2: Total Retail Floorspace and Turnover – 2013 – Aberdeen City and Aberdeenshire (contd)

	No.	Convenience			General Comparison			Bulky Goods			All Goods		
		GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m
OOO Retail Parks													
1. Highland	5	0	0	£0.00m	3696	2896	£13.13m	4987	3989	£4.30m	7468	5975	£17.43m
2. Coastal													
3. Aberdeenshire - Aberdeeen HM Excl conv part of Costco	1	0	0	£0.00m	3375	2194	£11.99m	3375	2194	£7.67m	11251	6948	£19.66m
4. City	29	0	0	£0.00m	7610	5708	£20.25m	39427	27404	£41.81m	47037	33112	£62.06m
TOTAL	35	0	0	£0.00m	14681	10797	£45.37m	47789	33587	£53.78m	65757	46034	£99.15m
Total Retail Goods Shops Only													
1. Highland Aberdeenshire	161	14547	9169	£50.04m	14761	9467	£26.83m	5997	3879	£7.07m	35305	22515	£83.93m
2. Coastal Aberdeenshire	435	45508	36631	£150.21m	48416	31871	£105.82m	21631	14763	£24.28m	115556	83265	£280.31m
3. Aberdeenshire - Aberdeeen HM	387	60243	38315	£279.09m	48093	31699	£136.95m	35472	23671	£50.87m	143809	93686	£466.90m
4. Aberdeen City	971	103583	64807	£500.06m	227668	148045	£893.38m	96962	65771	£157.11m	428212	278623	£1,550.55m
		46%		51%	67%		77%	61%		66%			
TOTAL	1954	223881	148923	£979.39m	338938	221082	£1,162.98m	160062	108084	£239.33m	722882	478089	£2,381.70m
Total Retail Goods Shops Only													
City Centre	460	23522	14665	£83.40m	156429	101587	£698.28m	20833	13499	£60.23m	200785	129751	£841.91m
		11%		9%	46%		60%	13%		25%	28%		35%
Town & District Centres	799	86992	54044	£466.41m	121736	79335	£312.83m	59205	40442	£89.74m	267933	173821	£868.98m
		39%		48%	36%		27%	37%		37%	37%		36%
Neighbourhood/Local Rural	638	62418	48283	£139.61m	31307	20319	£57.66m	29625	19015	£28.81m	124002	88478	£226.08m
		28%		14%	9%		5%	19%		12%	17%		9%
Supermarkets/Superstores	22	50949	31930	£289.96m	14785	9045	£48.84m	2610	1541	£6.78m	64406	40004	£345.58m
		23%		30%	4%		4%	2%		3%	9%		15%
Retail Parks	35	0	0	£0.00m	14681	10797	£45.37m	47789	33587	£53.78m	65757	46034	£99.15m
		0%		0%	4%		4%	30%		22%	9%		4%
TOTAL	1954	223881	148923	£979.39m	338938	221082	£1,162.98m	160062	108084	£239.33m	722882	478089	£2,381.70m
		31%		41%	47%		49%	22%		10%			

Retail Parks

- 4.6 Retail Parks comprise purpose built retail parks (e.g. Kittybrewster and Boulevard) and also groupings of large retail warehouse units including Garthdee, and Windmill Road, Peterhead. In total 35 retail warehouse units in this category are identified most of which are in Aberdeen City. In total these account for 65,757 sq m GFA (9%) of all goods floorspace and £99.2m turnover (4% of total). In the overall scale of retail provision these therefore have limited overall significance. However they are important for bulky goods floorspace accounting for 30% of total bulky goods floorspace and 22% of bulky goods turnover.
- 4.7 In order to understand the significance of modern retail units in out of centre locations within the study area, one should consider a combination of supermarkets/superstores and the retail parks category. These, in combination provide:
- 130,162 sq m GFA = 18% of the total retail goods floorspace
 - £444.7m turnover = 19% of total turnover.

Local Shopping Floorspace

- 4.8 All other local, neighbourhood and rural floorspace primarily comprises small independent shops and services but also includes large units such as garden centres. In total 638 retail units are identified in this category – that is over one third of all units. In terms of floorspace and turnover their significance is much less – they account for 17% of all floorspace and only 9% of turnover.

Retail Services

- 4.9 Retail services cover a wide range of personal, catering and financial services and facilities within centres. In total they are identified to occupy 122,641 sq m floorspace within the city, town and district centres within the study area that is 20% of the total retail goods, services and vacant floorspace. In total there are 985 retail service units identified within the city, town and district centres (although there are many outwith these locations) – that is over 40% of all units in the centres are providing retail services.

Vacant Units

- 4.10 According the Grampian Assessor records there is currently 26,008 sq m of vacant retail goods and retail services floorspace within the city, district and town centres. This equates to a vacancy rate, by floorspace, of 5%. It is likely that this floorspace figure slightly underestimates the scale of vacancies in certain towns and that the actual vacancy rate is in the region of 6-7% by floor area.

Principal Retail Locations

4.11 Figures 3 and 4 show the principal retail locations within the study area by floorspace with the size of each “pie” relative to the total gross floorspace in each location. Volume 2 of the Report provides a detailed review of retailing in each of the principal retail centres, including the City Centre, within the Study Area.

Figure 3: Aberdeen City – Retail Floorspace 2013

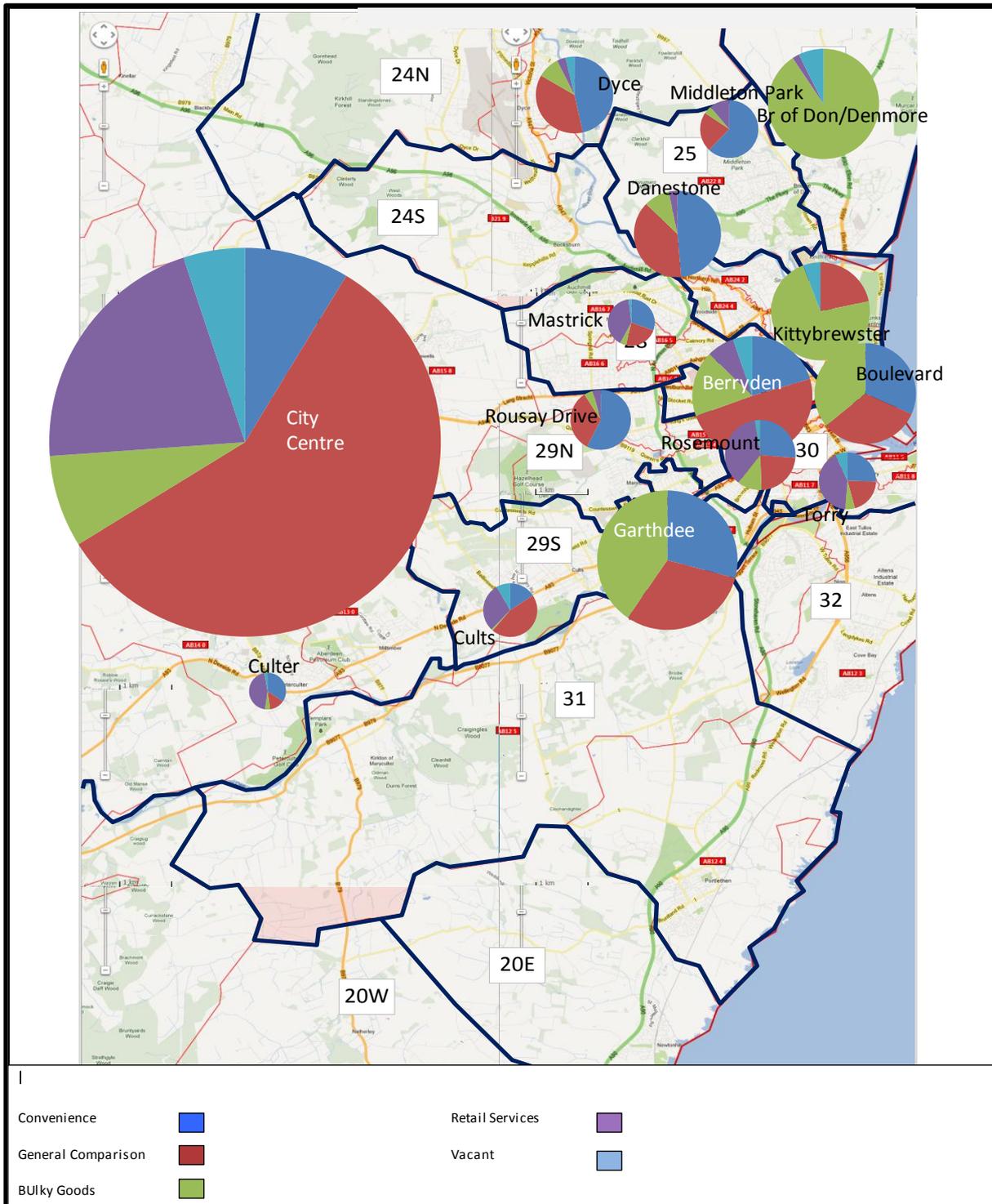
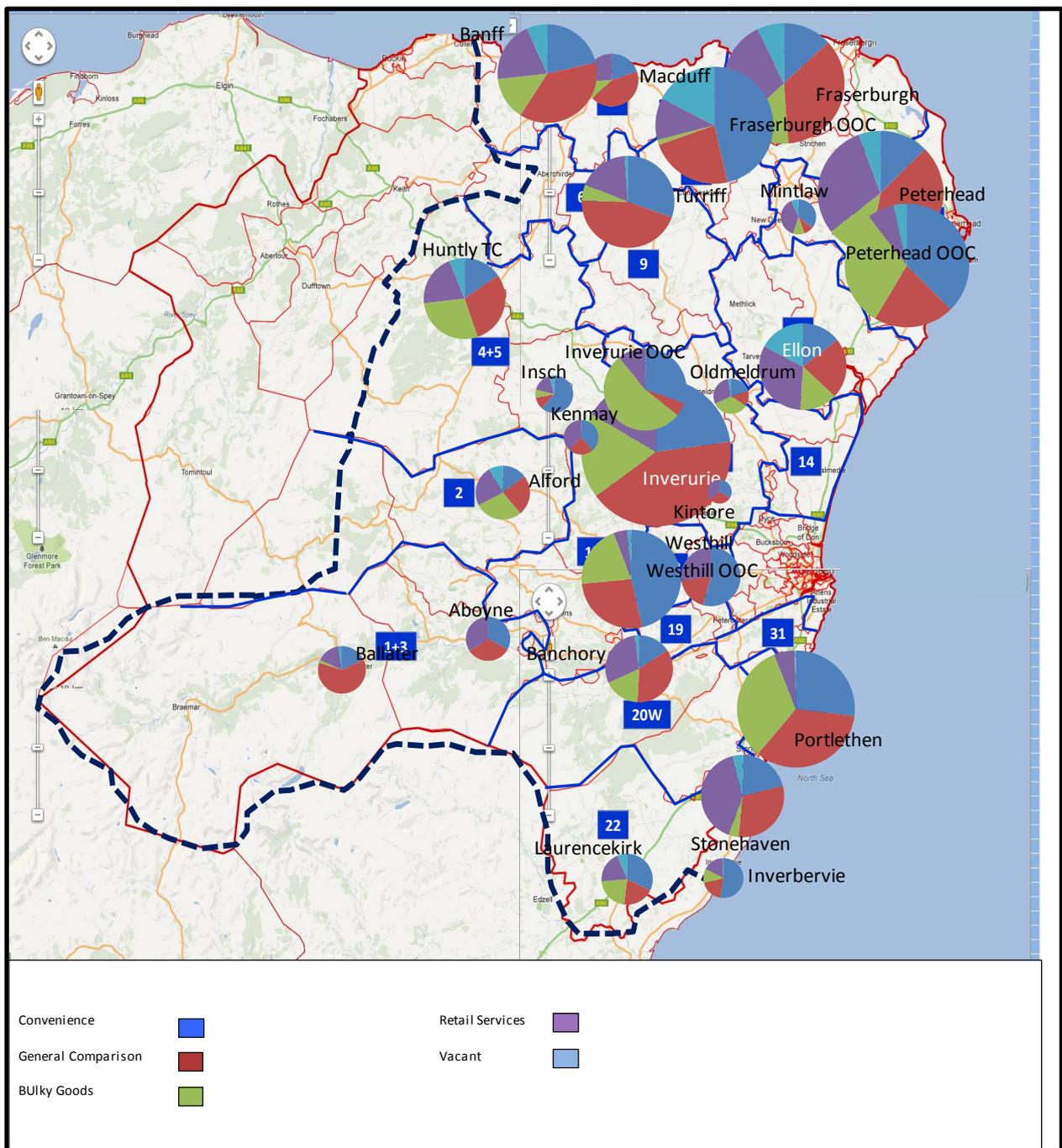


Figure 6: Aberdeenshire – Retail Floorspace 2013



Changes Since 2004

4.12 Table 5 shows the changes in available expenditure, turnover and gross floorspace that have been observed between 2004 and 2013 for the whole study area. This shows that there are marked differences between different retail goods categories:

- Convenience goods: whereas available expenditure has declined by 13% and turnover has declined by a similar amount the total floorspace has increased by 18%.

- For general comparison goods expenditure and turnover have increased by approximately 80% and floorspace by only 20%.
- For bulky goods expenditure and turnover has increased by approximately 5% and floorspace has declined by almost 20%.

Table 5: Expenditure, Turnover and Floorspace Changes – Study Area 2004-2013

Total Available Expenditure £m (2011 prices)									
	2004			2013			Change 04-13		
	Net SFT	SFT	Total	Net SFT	SFT	Total	Net SFT	SFT	Total
Convenience	1156.0	11.7	1167.7	1010.1	20.6	1030.7	-13%	76%	-12%
General Comparison	674.3	60.2	734.5	1195.1	131.3	1326.4	77%	118%	81%
Bulky Goods	241.4	21.6	263.0	249.4	27.4	276.8	3%	27%	5%
Total	2071.7	93.5	2165.2	2454.6	179.3	2633.9	18%	92%	22%
Turnover £m (2011 prices)									
Convenience	1136.9			989.9			-13%		
General Comparison	677.4			1199.9			77%		
Bulky Goods	234.6			247.5			6%		
Total	2048.8			2437.3			19%		
Gross Floorspace									
Convenience	190249			223881			18%		
General Comparison	283612			338938			20%		
Bulky Goods	196929			160062			-19%		
<i>Total Goods</i>	<i>670790</i>			<i>722881</i>			<i>8%</i>		
Retail Services	186412			169198			-9%		
Vacant	59984			46104			-23%		
Total Goods and Services	917186			938183			2%		

Future Expenditure, Floorspace and Turnover

Available Expenditure Changes

4.13 Forecasts identify the following growth in available expenditure:

- *Convenience Goods*: the central case identifies modest growth from 2013 to 2022 of +10% and +16% to 2027 (range of growth based on different forecast assumptions to 2027: +11% to +27%).
- *General Comparison Goods*: the central case identifies high growth from 2013 to 2022 of +40% and +71% to 2027 (range: +32% to +114%).
- *Bulky Goods*: the central case identifies high growth from 2013 to 2022 of +41% and +73% to 2027 (range: +33% to +116%).

Patterns of Expenditure Flows

- 4.14 There is an expectation that there will be greater concentration of retail activity in larger retail units and centres. For convenience goods this is likely to be less significant because of the comprehensive network of major stores already available within the study area and recent trends supporting local convenience-format stores. However for comparison goods the current trends are reinforcing the role of major centres (this would include the City Centre, major retail parks and larger town/district centres).

Retail Commitments

- 4.15 There is a substantial amount of retail floorspace included within the list of retail commitments. In total 60,361 sq m GFA retail goods floorspace is identified – 64% in Aberdeenshire and 36% in Aberdeen City. Furthermore 48% of the proposed retail floorspace is for convenience goods and only 29% for general comparison and 23% of bulky goods.

Network of Centres

- 4.16 Scottish Planning Policy requires the identification of a network of centres within a planning authority area. The role of individual centres within the network should also be identified. Table 6 sets out the proposed retail network for the study area together with a summary of the function and role of each category.

Table 6: Proposed Retail Network

Category of Centre	Function/Role of Centre	Locations
<i>Regional Centre</i>	<i>Principal retail location for the north east of Scotland. Provides very wide range of retail, retail service and non-retail public and commercial services and facilities. Provides a focus for the city- and region-wide community and as a focus for transport.</i>	<i>Aberdeen City Centre</i>
<i>Town Centres</i>	<i>Provide a wide range of retail, retail service and non-retail public and commercial services and facilities. Provide a focus for the local community (town and immediate rural hinterland) and for local transport networks.</i>	<i>Aberdeenshire: Banchory; Banff; Ellon; Fraserburgh; Huntly; Inverurie; Peterhead; Stonehaven; Turriff; Westhill Aberdeen City: Rosemount; Torry</i>
<i>District Centres</i>	<i>Provide a range of retail and non-retail services and facilities meeting a significant proportion of shopping requirements for the surrounding local communities located primarily in suburban locations (City of Aberdeen). Superstore-based District Centres have more limited non-retail offer.</i>	<i>Aberdeenshire: Portlethen Aberdeen City: Upper Berryden; Danestone; Dyce; Rousay Drive; Middleton Park</i>
<i>Local and Village Centres</i>	<i>Provide a limited range of retail facilities and other services/facilities – primarily meeting some of the day-to-day needs of the local community.</i>	<i>Aberdeenshire: Aboyne; Alford; Ballater; Inch; Inverbervie; Kenmay; Kintore; Laurencekirk; Macduff; Mintlaw; Oldmeldrum Aberdeen City: Cults; Culter; Mastrick</i>
<i>Neighbourhood Centres</i>	<i>Small groups of local shops/parades – primarily convenience and local retail services.</i>	<i>Numerous</i>
<i>Other Commercial Locations:</i> - Retail Parks - Others	<i>Retail developments (either purpose built or well-defined groups of separate units) that serve one or more specific retail market sectors with relative wide catchment areas.</i>	<i>Aberdeenshire: Fraserburgh (Maconachie Road); Portlethen; Westhill (Endeavour Drive) Aberdeen City: Lower Berryden; Boulevard RP; Garthdee; Kittybrewster RP</i>

5 Retail Deficiencies and Floorspace Strategy

5.1 The SRM allows analysis to be undertaken to identify potential existing and future retail deficiencies using a variety of techniques.

5.2 The principal retail deficiencies for convenience floorspace are identified to be:

- Limited potential for additional convenience floorspace in Ellon and Banchory only from 2022 onwards. If the Aldi is implemented in Ellon then the convenience retail potential here will be reduced.
- Potential for large supermarkets/small superstores for Stonehaven and the new settlement at Chapelton of Elsick.
- New large supermarket/superstore in Zone 24S (Bucksburn area) for 2017 onwards – primarily to serve major new housing allocations at Newhills.
- New convenience floorspace in Zone 29N. No specific location is identified and this can be met through the provision of convenience floorspace in more than one location. Qualitative deficiencies would support some of this floorspace to be located in the Countesswells development to serve local day-to-day and limited main food shopping needs.
- New supermarket to serve Grandholme. The provision of a new foodstore in this community is not justified by a *quantitative* retail deficiency but the limited level of convenience retailing within the communities (i.e. a qualitative retail deficiency) reflecting other planning considerations. The development is within relatively easy access to major superstores and therefore the opportunity is primarily for a medium sized foodstore and related floorspace to serve local day-to-day and limited main food shopping needs.

Summary and Conclusions – Comparison Goods

5.3 The assessment of retail deficiencies for comparison goods indicates that there is potential for additional comparison floorspace in each of the following:

- Inverurie
- Stonehaven
- Ellon
- Banchory
- New retail locations in west, central and south Aberdeen
- Aberdeen City Centre

New Retail Floorspace Scenarios

5.4 In order to assist the identification of the preferred strategy for the provision of new retail floorspace a series of alternative development scenarios have been identified and tested using the SRM. Three of these were subject to detailed evaluation – these three were:

- Scenario 1: Do Minimum – this assumes only “committed” developments plus a modest amount of retail development within the proposed redevelopment of St Nicholas House in the City Centre.
- Scenario 3: Addressing deficiencies plus City Centre development. This includes all development identified within the “Do Minimum” plus meeting all retail deficiencies identified together with 30,000 sq m GFA floorspace for comparison goods within the City Centre.
- Scenario 5: Addressing deficiencies plus comparison floorspace development within the City Centre (i.e. Scenario 3) together with a further 30,000 sq m GFA comparison floorspace elsewhere in Aberdeen City (outwith the City Centre).

5.5 The scenarios were evaluated in terms of:

- The extent to which different scenarios address the retail deficiencies (both quantitative and qualitative).
- The overall impacts on the level of retailing within the study area which provides the basis for identifying overall net economic benefit to the study area.
- The potential adverse retail impacts on identified retail centres arising from the different scenarios.

5.6 From this evaluation a recommended preferred retail development strategy was identified which was based on Scenario 3 but with some reductions in total floorspace proposed outwith the City Centre. This preferred development strategy has been included within the proposed Retail Strategy.

6 Recommended Retail Strategy

Issues to be addressed in the Retail Strategy

6.1 The key issues to be addressed in the recommended Retail Strategy are identified in the following box.

Key Issues to be addressed through the Retail Strategy

1. **The protection and enhancement of city, town and district centres.** *This reflects the importance of these centres providing important services and facilities to the wider community consistent with a “town centres first” policy approach. In addition the importance of protecting, where possible, local shopping provision in the city, towns and in rural areas to support local access to shopping facilities. This will support social inclusion and the minimisation of travel demand and reducing overall carbon emissions.*
2. **Encouraging new investment in retail** *in both existing retail centres (including both new floorspace and the re-use of existing space, including vacant space) and in new centres which serve new residential areas proposed within the city and shire towns and in the proposed new town of Chapelton of Elsick.*
3. **To ensure that all new retail developments contribute towards reducing the need to travel** *and encourage people to walk, cycle or use public transport by making these attractive choices.*
4. **Addressing identified existing retail deficiencies** *(qualitative and quantitative).*
5. **Addressing the retail needs of new expansion areas** *in both the city of Aberdeen and in the growth areas of Aberdeenshire.*
6. **Facilitating and supporting the growth of retail within Aberdeen City Centre** *to maintain and strengthen the vitality and viability of the City Centre and to maintain the City Centre as the principal retail location serving the north east of Scotland. The primary focus of the City Centre will be for comparison goods retailing. However it is recognised that the delivery of new sites within the City Centre is a difficult and protracted process reflecting a range of development constraints including complex land ownership. Therefore, in order to provide the maximum opportunity for City Centre development to proceed, some restraint is proposed for out-of-centre retail proposals elsewhere in the City and Shire.*
7. **Identifying general policy principles** *to be applied for all new retail development consistent with Scottish Planning Policy – notably in terms of protecting the vitality and viability of centres and the application of the sequential approach.*
8. **Identifying particular issues** *anticipated to arise with specific retail sectors and different types of retail proposals.*

Network of Centres

6.2 The proposed network of centres and the role of centres within the Network were set out in Table 6.

Planning for New Retail Floorspace

6.3 The recommended development strategy for new retail floorspace is set out in Table 7.

Table 7: Proposed Development Strategy for Retail Floorspace

Zone	Location	Proposed Development	Trading by	Floorspace Type			Approx. Total Area (Sq M)		Status	Role of Proposal
				Conv	GC	BG	GFA	NFA		
1. Retail Commitments Aberdeen City										
23	Site 4 Denmore Road	Unrestricted Class 1	2015-20	✓	✓	✓	7200	4300	PP granted	Superstore and comparison floorspace for Dubford/ Denmore area
23	Dubford	Class 1	2015-20	✓	✓	✗	500	300	PP granted subject s75	Additional local retail
26	390-406 Great Northern Road	Convenience Format Foodstore	2015-20	✓	✗	✗	200	150	PP granted	Additional local retail
28	Haudegain Triangle	Retail Park	2020-25	✗	✓	✓	6500	4900	LDP allocation	Comparison floorspace for north west Aberdeen
29N	Hazlehead Nurseries	General Comp	2015-20	✗	✓	✗	500	400	PP granted	Additional local retail
32	Souter Head Road, Cove	Residential or retail opportunity	2015-20	✓	✓	✓	5800	3500	LDP allocation	Addresses supermarket deficiencies in south Aberdeen
32	Wellington Road (E)	Class 1	2015-20	✓	✓	✗	900	600	PP granted	Additional local retail
Aberdeenshire										
6	Market St, Turriff	Supermarket	2015-20	✓	✓	✗	3200	1900	PP granted	Addresses main food supermarket deficiencies in Turriff
7	Canal Park, Banff	Supermarket (Tesco)	2015-20	✓	✓	✓	4300	2600	PP granted	Addresses main food supermarket deficiencies in Banff
10	Watermill Road, Fraserburgh	Supermarket (Asda)	2015-20	✓	✓	✓	4600	2300	PP granted	Extends supermarket choice in Fraserburgh
11	Kirkburn Mills, Peterhead	Mixed class 1 retail	2015-20	✓	✓	✓	4600	3000	PP granted	Extends convenience and comparison retail offer in Peterhead
11	Asda, Peterhead	Extension	2015-20	✓	✓	✓	2000	1500	PP granted	Extends supermarket offer in Peterhead
11	Buchan Gateway, Peterhead	Bulky goods retail warehousing	2015-20	✗	✗	✓	4600	3500	PP granted	Extends bulky goods offer in Peterhead

Table 7: Proposed Development Strategy for Retail Floorspace (contd)

Zone	Location	Proposed Development	Trading by	Floorspace Type			Approx Total Area (Sq M)		Status	Role of Proposal
				Conv	GC	BG	GFA	NFA		
11	St Peter Street, Peterhead	3 non-food retail units	2015-20	✗	✓	✗	1900	1200	PP granted	Extension of Peterhead town centre retail offer
15	Midmill, Kintore	Supermarket	2015-20	✓	✓	✗	1400	800	PP granted	Addresses main food supermarket deficiencies in Kintore
15	Forest Road, Kintore	3 units Class 1	2015-20	✓	✓	✗	600	400	PP granted	Additional local retail
16	Harlaw Road, Inverurie	Proposed superstore	2015-20	✓	✓	✓	6000	3600	PP granted	Extends supermarket choice in Inverurie
16	Harlaw Road, Inverurie (Aldi)	Proposed foodstore	2015-20	✓	✓	✗	1600	1100	PP granted	Extends supermarket choice in Inverurie
18	Westhill Centre	5 retail units (phase 1 of expansion)	2015-20	✓	✓	✗	1200	800	PP granted	Extension of Westhill town centre retail offer
19	Deeside Nurseries, Drumoak	Extension to Garden Centre	2015-20	✗	✗	✓	2800	2300	PP granted	Increases leisure retail offer
2. Additional Proposals Aberdeen City										
30	City Centre	Major city centre retail	2020-25	✗	✓	✓	30000	19500	Proposal	Promotes long term growth of regional centre
30	City Centre	St Nicholas House	2015-2020	✓	✓	✗	1800	1200	Proposal	Enhances City Centre retail offer
24S	Newhills/Bucksburn area	Supermarket	2020-25	✓	✓	✗	4000	2400	Proposal	Addresses deficiencies – creation of new district centre combining convenience and comparison floorspace in Newhills growth area
24S	Newhills/Bucksburn area	Mixed comparison (district centre)	2020-25	✗	✓	✓	3500	2275	Proposal	
25	Grandholme	Supermarket	2020-25	✓	✓	✗	4000	2400	Proposal	Addresses deficiency – creation of new district centre combining convenience and comparison floorspace in Grandholme growth area
25	Grandholme	Mixed comparison (district centre)	2020-25	✗	✓	✓	3500	2275	Proposal	

Table 7: Proposed Development Strategy for Retail Floorspace (contd)

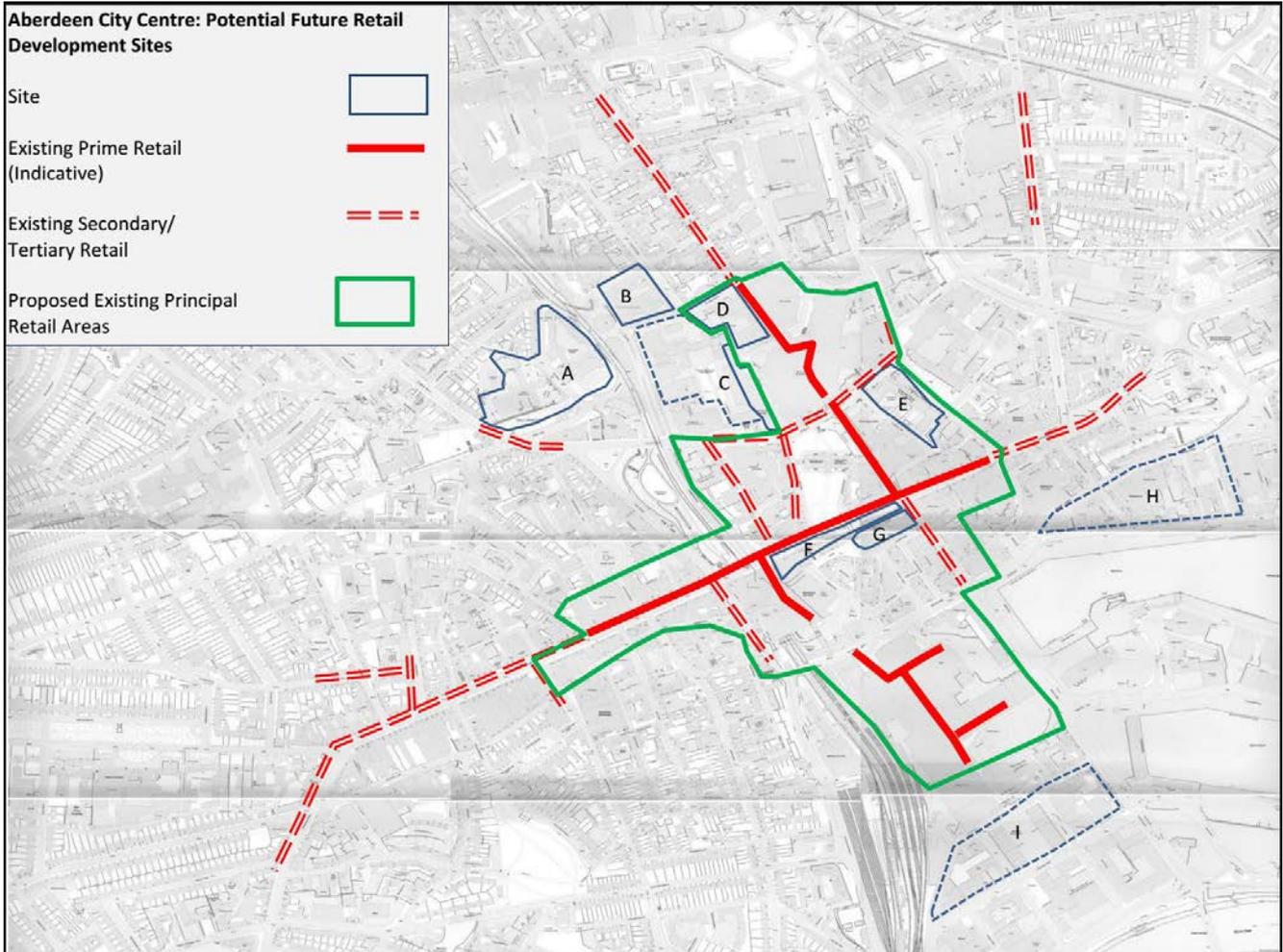
Zone	Location	Proposed Development	Trading by	Floorspace Type			Approx Total Area (Sq M)		Status	Role of Proposal
				Conv	GC	BG	GFA	NFA		
29N	West Aberdeen/ Countesswells	Supermarket/Superstore/ other convenience	2020-25	✓	✓	✗	5500	3500	Proposal	Provision of convenience floorspace to address quantitative deficiency. No specified location and may include floorspace in more than one location. A proportion of the floorspace is encouraged to be provided within Countesswells to form the basis of a new centre (see below).
29N	Countesswells	Mixed convenience and comparison	2020-25	✓	✓	✗	See "Role of Proposal"		Proposal	New centre to be provided comprising both convenience and comparison floorspace. Quantum of convenience floorspace to be from the total convenience floorspace identified for Zone 29N plus additional limited general comparison floorspace (1500 sq m GFA to be taken as indicative maximum).

Zone	Location	Proposed Development	Trading by	Floorspace Type			Approx Total Area (Sq M)		Status	Role of Proposal
				Conv	GC	BG	GFA	NFA		
Aberdeenshire										
13	Ellon	Mixed comparison	2020-25	x	✓	✓	10000	7000	Proposal	Addresses deficiency - enhances comparison goods offer in Ellon
16	Inverurie	Mixed comparison	2020-25	x	✓	✓	5000	3500	Proposal	Enhances comparison goods offer in sub-regional centre
21	Stonehaven	Supermarket	2020-25	✓	✓	x	4000	2400	Proposal	Addresses deficiency for main food shopping in Stonehaven
20E	Chapelton of Elsick	Supermarket	2020-25	✓	✓	x	4000	2400	Proposal	Addresses deficiency - creation of new town centre combining convenience and comparison floorspace in new town of Elsick
20E	Chapelton of Elsick	Mixed comparison (town centre)	2020-25	x	✓	✓	3500	2450	Proposal	
Total Aberdeen City							75400	48600		
Total Aberdeenshire							65300	42750		
Total existing commitments							60400	39150		
Total additional proposals							80300	52200		
GRAND TOTAL							140700	91350		

Aberdeen City Centre Floorspace

6.4 The recommended retail development strategy identifies 30,000 sq m GFA new retail floorspace to be located in the City Centre. A range of potential sites have been identified and reviewed to assess their potential for contributing towards this floorspace. The location of the potential sites, together with an indication of the primary and secondary retail locations within the City Centre and also the proposed City Centre Prime Retail Area is shown in Figure 8.

Figure 8: Aberdeen City Centre Potential Development Sites



6.5 The redevelopment of sites within the City Centre for new retail floorspace will be a complex and difficult process. Therefore it is recommended that a number of sites should be pursued to achieve the desired level of new retail floorspace within the City Centre comprising both major development sites and smaller sites. The recommended strategy is, therefore, as set out in the following box.

Recommended Development Strategy for City Centre Retail Floorspace

Major Retail Development Sites

- Identify land at Denburn/Woolmanhill (Site A) for major new retail development. As part of this identify mechanisms to support the integration of this site with the remainder of the City Centre.
- Monitor position and liaise with Robert Gordon College and Robert Gordon University regarding future potential of land at Schoolhill (Site C). If this site has the potential for redevelopment in the future then it should be identified as the preferred major retail development site within the City Centre.
- Review other major sites (Site H – Virginia St and Site I – Union Square South) only if no progress can be made with either Sites A or C).

Other Retail Development Sites:

- Identify the following sites for City Centre retail development:
 - Site D – George St/Crooked Lane
 - Site F – 73-149 Union Street
 - Site G – Aberdeen Market

Policy Framework

- 6.6 Retail planning and town centre policies (covering each of city, town and district centres) require to be provided in the Strategic and Local Development Plans.

Retail Policy Objectives

- 6.7 Planning objectives for retailing within the study area should include:
- Support for Aberdeen City Centre as the principal shopping location serving the whole of the north east of Scotland. This support should include both the enhancement of retail provision and the protection of the City Centre against adverse retail impact from retail developments outwith the City Centre.
 - Improving overall access to shopping provision – particularly for day-to-day shopping requirements thereby minimising the need to travel.
 - Recognition of the economic benefits of retailing.
 - Addressing identified retail deficiencies through the allocation of sites for new retail development.

- Ensuring that significant new urban areas (whether new towns or extensions to existing settlements) incorporate an appropriate range of retail facilities including new town or district centres (comprising a range of types of retail unit) where appropriate.

Proposals for Retail Development

- Proposals which include retail development consistent with the proposals identified in the Development Strategy for Retail Floorspace (Table 7 above) should be supported. Proposals that incorporate floorspace significantly greater, or of a different character/type of floorspace, would not be consistent with the recommended strategy.
- Proposals that are not identified in the Development Strategy for Retail Floorspace, or are not consistent with it should be assessed in terms of:
 - Application of the sequential approach.
 - The retail impact that the proposed development would have, on its own and taking into account cumulative effects with other proposals, on the vitality and viability of relevant centres.
 - The extent to which the proposal will help meet quantitative or qualitative retail deficiencies identified in this report and which would not be addressed by other retail proposals identified in Table 7.

Sequential Approach

- A sequential approach should be adopted for all retail proposals with the exception of those proposals that comprise the formation of a new district or town centre (as identified in Table 8). The sequential approach should take into account recent court decisions about the application of the approach.

Aberdeen City Centre

- Identification of the Principal Retail Area. This should be consolidated to reflect the nature of retail uses and occupiers within the City Centre as shown in Figure 8.
- In areas to the west of the Principal Retail Area (west end of Union Street) and north (northern part of George Street) there should be encouragement of mixed commercial and residential uses as well as retail and retail services.
- Other initiatives aimed at supporting the vitality and viability of the city centre including pedestrianisation of Union Street in the prime retail core, environmental improvements and transport infrastructure improvements should be supported.

Other Locations

- Both Torry and Fraserburgh town centres exhibit signs of weakness in terms of vitality and viability and are vulnerable to adverse retail impact. Notwithstanding the desire to encourage investment by both the private and public sectors in these centres it is appropriate to consider means for the rationalisation and consolidation of retail uses in these centres including the encouragement on non-retail commercial uses and residential development within the town centres.

Issues with Retail Sectors

- 6.8 The general retail planning objectives and policy framework outlined above should be applied to all retail sectors and sub-sectors. The report however provides a commentary on particular issues that would apply to different types of retail development including: supermarkets & superstores; other types of convenience floorspace; retail warehouses (comparison goods); very-large floorplate units; tourist retail; garden centres; and retail clubs/warehouses.

Monitoring

- 6.9 The strategy also makes recommendations for monitoring retail development.

Recommended Retail Strategy – Summary for Centres

- 6.10 The recommended Retail Strategy comprises a number of distinct elements: identification of the Network of Centres; the protection of defined centres within the Network; promotion of retail investment in Centres; addressing retail deficiencies; supporting retail facilities in new urban areas; identification of new retail development within the City Centre and elsewhere; identification of key policy principles; and consideration of the particular issues for different retail sectors. These have varying effects on different settlements and centres. Table 6.4 in Volume 1 of the Report provides a summary of the position for each of the centres identified in the Network of Centres including:

- Characteristics of retail provision – market area served and scale of retail turnover
- Summary of key retail issues and deficiencies affecting the centre.
- Existing retail commitments affecting the centre (including those proposed nearby but outwith the defined centre).
- Implications of the recommended Retail Strategy for each centre.

Aberdeen City and Aberdeenshire Retail Study 2013

Final Report Volume 1:

Main Report

October 2013

reference:

Contact: **Keith Hargest**

Tel: **0131 443 8813**

Email: **keith.hargest@btconnect.com**

Contents

1	Introduction	1
2	Overall Study Approach	4
3	Trends in Retailing	16
4	Retailing in Aberdeen and Aberdeenshire	29
5	Retail Deficiencies and Floorspace Strategy	54
6	Recommended Retail Strategy	73

Ordnance Survey plans contained in this report reproduced under license 100040565

1 Introduction

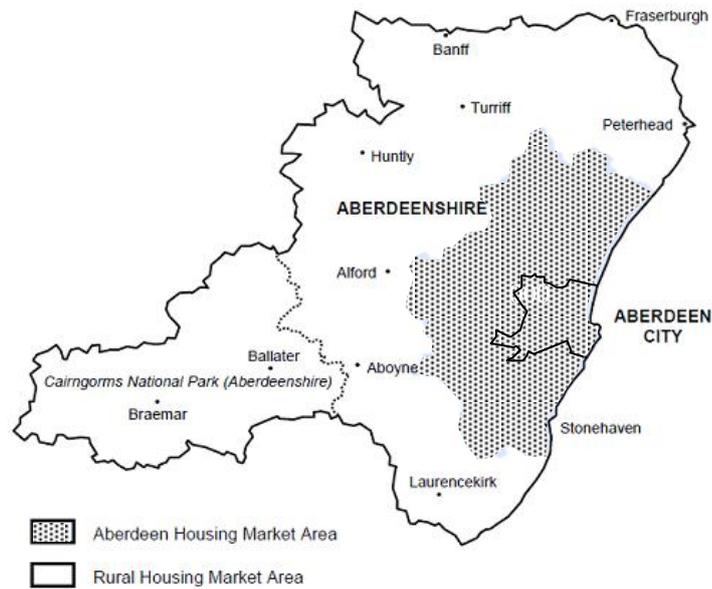
Background

- 1.1 This Aberdeen City and Aberdeenshire Retail Study (ACARS) has been prepared to provide an up to date assessment of retail provision within Aberdeen City and Aberdeenshire and to provide an assessment of potential future demand and supply for retail floorspace within this area for the next 15 years or so. The primary purpose of this assessment is to provide a basis for the development of plans and proposals for retail and related activities in the Strategic Development Plan and Local Development Plans being prepared for the Aberdeen City and Aberdeenshire planning authority areas.
- 1.2 The study has been commissioned jointly by Aberdeen City and Shire Strategic Development Planning Authority, Aberdeen City Council and Aberdeenshire Council. It provides an update of the Aberdeen and Aberdeenshire Retail Study (AARS) which was undertaken in 2004. Earlier major assessments of retail demand and supply in the north east of Scotland were undertaken in 1998 for Aberdeen City and in 1999 for Aberdeenshire.
- 1.3 Retailing remains one of the key mechanisms by which households gain access to goods and services. It does not account for all services (for example education, healthcare and other public services are not normally provided through retail or retail services) but access to retailing, whether located in town centres or elsewhere, remains of key importance for social inclusion. Retailing is, however, rapidly changing. Over the past decade, and the last 5 years in particular, major shifts in the way that retail goods and services are delivered to households have become apparent, for example through the rise in the use of internet. Furthermore major population growth is planned for the north east of Scotland which includes large scale housing development within the City and in development corridors to the north, north west and south of the City. It is therefore, important that information on retail provision and anticipated future demand is kept up to date for development planning purposes.
- 1.4 This report sets out the findings of the Study. The report is provided in three volumes:
 - Volume 1 sets out an overview of the study – the approach and method and the key findings of the study including: an analysis of retail trends; a description of current retail provision in the study area; analysis of changes since 2004; future demand and supply; and a recommended strategy for development planning for retail and retail services within the study area.
 - Volume 2 provides a review of current and future provision for all the principal retail locations within the study area. This includes Aberdeen City Centre and a wide range of smaller centres located throughout the study area.
 - Volume 3 sets out the appendices for the study.
- 1.5 An Executive Summary of the report is also provided as a separate volume.

Study Brief

- 1.6 An Invitation to Quote for the Study was issued in March 2013. This identified the following requirements and objectives for the study:
- Provide appropriate data on retailing fit for the purpose of developing a retail strategy and assessment of retail proposals.
 - Identify an appropriate scale and mix of retail provision for major housing allocations in Aberdeen City.
 - Identify appropriate future retail provision for Aberdeen City Centre and a preferred option for additional City Centre floorspace.
 - Identify issues associated with particular retail categories.
 - Identify potential implications and risks associated with long term trends in retailing.
 - Develop a retail strategy for the Aberdeen Housing Market Area.
 - Identify potential implications for development plans in terms of policy and allocations.
- 1.7 The study brief identified the study area to comprise the Aberdeen City and Shire Strategic Development Plan area with the focus on the Aberdeen Housing Market Area. However it is evident from both the results of the current study together with that identified in AARS that those parts of the National Park which lie within Aberdeenshire are functionally part of the retail network identified for the Study Area – in particular there is a clear dependence for those residing within the National Park on retail provision both within the City and in towns in Aberdeenshire. Therefore the effective study area used for ACARS has *included* those parts of Aberdeenshire that are located within the National Park but no recommendations within this study directly apply to the National Park.
- 1.8 Furthermore the primary focus of the study, as required in the study brief set out in the Invitation to Quote, is the area lying within the Aberdeen Housing Market Area. In retail terms, there is a clear functional relationship between those areas in the Rural Housing Market Area and the Aberdeen Housing Market Area (particularly in terms of the extent to which trade draw to major retail centres extends beyond the housing market area boundary) such that, in strategic retail planning terms, it is preferable to include all parts of the Strategic Development Plan area within the study. Therefore the study has undertaken an analysis of demand and supply for retail for the whole of the Aberdeen City and Aberdeenshire although the primary focus in terms of recommendations for new retail floorspace is with centres located within the Aberdeen Housing Market Area. The relationship between these different areas is illustrated in Figure 1.1.

Figure 1.1: Study Area Boundaries



1.9 In summary the brief has been interpreted as requiring:

- Use of up-to-date data for the preparation of a Strategic Retail Model (“SRM”) for the period to 2027.
- Recommendations for a retail strategy with the principal focus on the city and settlements within the Aberdeen Housing Market Area. This strategy is to include:
 - addressing retail deficiencies in existing urban areas;
 - identification of retail floorspace to serve new and expanded urban areas;
 - the future growth of the City Centre;
 - consideration of specific retail sectors and other factors; and
 - a framework for emerging development plans.

2 Overall Study Approach

2.1 The Study has been undertaken using a range of techniques and data sources. The principal techniques used for the Study are:

- Data review: existing and future population; existing retail and retail service floorspace; existing and future available expenditure forecasts; tourism expenditure.
- Household survey.
- Long term market trends and review.
- Development of the Strategic Retail Model (SRM) – including the use of sensitivity tests and development scenarios.
- Review of existing retail centres – surveys and town centre health checks (vitality and viability).

Data Review

2.2 The accuracy of forecasts from the SRM is dependent on the quality of the data that is used for the model. Where there are uncertainties about data (for example concerning expenditure growth rates or the future use of the internet) then these can be overcome through the use of sensitivity testing (this is described below).

2.3 Data sources used for the study are as follows.

Existing Retail Floorspace.

2.4 Disaggregated data was provided by the Regional Assessor for all retail units within the study area. All properties were reviewed to identify whether the principal use was for: convenience goods retailing; general comparison goods retailing; bulky goods retailing; retail services; and vacant retail goods/service units. The working definitions for these categories is as follows:

- *Convenience Goods.* Pitney Bowes Retail Expenditure Guide definitions have been adopted i.e. convenience goods: food; alcoholic and non-alcoholic drinks; tobacco; non-durable household goods; and newspapers and magazines.
- *General Comparison Goods.* Pitney Bowes Retail Expenditure Guide definitions have been adopted i.e. books; clothing and footwear; audio visual goods (excluding those identified as bulky); chemists goods; jewellery etc; recreational goods and other miscellaneous goods (excluding those identified as bulky).
- *Bulky Comparison Goods.* Furniture and floor coverings; domestic appliances; repair/maintenance materials; tools/equipment for home and garden; garden plants/flowers; and limited other goods.
- *Retail Services.* These reflect Goad survey categories and include: restaurants/cafes/fast-food; hairdressing/beauty/health; launderettes; travel agents; banks and financial services; building societies;

estate agents; betting; video/dvd hire; and other services aimed at serving passing members of the public (rather than uses where normal business would be by prior arrangement).

- 2.5 The above definitions are consistent with those adopted in the 2004 study. It is important to note that the above definitions do *not* match classes identified in the Use Classes Order – in particular Class 1 Shops is a wider definition than is used in this study and includes uses that are either retail services (e.g. travel agent) or, for the purpose of this study, not identified to be retail (e.g. funeral director).

Population

- 2.6 Base line population has been derived from Scottish Neighbourhood Statistics and the 2011 Census. This has been aggregated to provide population estimates for strategic model zones. Forecasts were based as follows:

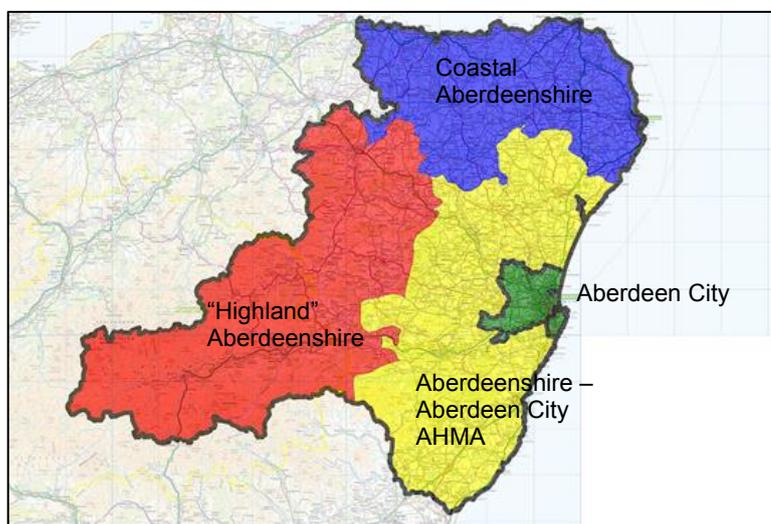
- Low growth – from SDPA 2008 based forecasts (no adjustment)
- Central case – from SDPA 2008 based forecasts – with uplift adjustment to match to 2011 census results.
- High growth – from SDPA 2010 based forecasts – with uplift to match 2011 census results.

- 2.7 Current LDP/SDP allocations for growth corridors and development sites for future housing development were used for allocation to individual study zones with adjustment to other zones to control total population to the GRO global totals.

Available Expenditure, Growth and Special Forms of Trading

- 2.8 Available expenditure for four sub-regions (“highland” Aberdeenshire, coastal Aberdeenshire, Aberdeenshire - Aberdeen City HMA; and Aberdeen City) were provided by Pitney Bowes Business Insight AnySite reports. These are reproduced in Appendix A (Volume 3). Figure 2.1 shows the location of these sub-regions.

Figure 2.1: Location of Study Sub-Regions



2.9 Expenditure growth forecasts have used forecasts produced by both Pitney Bowes Business Insight (trend forecasts and Oxford Economic Forecasts) and Experian. The following alternative forecasts have been identified:

- Low case: Experian (RPG 10.1) Defensive Households Forecast and Pitney Bowes Central Forecast for SFT growth.
- Central Case: average of Pitney Bowes OEF (Retail Expenditure Guide Sept 2012) and Experian (Retail Planning Guide 10.1 – Sept 2012). These assumptions were used for *both* total available expenditure growth and special forms of trading (“SFT”) assumptions.
- High Case: Pitney Bowes OEF (Sept 2012) and Pitney Bowes Central Forecast for SFT growth.

2.10 Various combinations of expenditure growth and SFT growth were tested in the development of the model and the above were identified to represent reasonable limits to forecast ranges.

Tourism

2.11 Estimates for tourism expenditure in shops were derived from the 2011 data for Aberdeen City and Aberdeenshire for comparison goods and estimates of convenience goods spend is made by reference to UK national average convenience goods spend per day and occupancy rates for different types of accommodation in the study area. Tourist data for 2005-11 did not demonstrate any clear trend in changing expenditure levels and therefore, for the purpose of the study, the SRM did not build in growth or decline in tourist spend in shops.

2.12 To ensure a consistent approach to tourism the model also estimated tourist spend by study area residents made while staying away from the study area. The retail model therefore estimated the net effect of tourist spend on available expenditure (therefore in areas of high tourism activity such as Deeside this added to expenditure whereas in other areas such as parts of the Aberdeen suburbs tourist spend reduced overall available expenditure).

Household Survey

Introduction

2.13 A key component for accurately understanding the operation of retail patterns and estimates of actual retail turnover is the use of extensive and detailed surveys. In this study an extensive household survey has been undertaken to establish both behavioural and attitudinal information about retail habits in the study area. This includes the following:

- The identification of quantitative information on shopping habits. This includes the identification of reasonable estimates of spend on different types of goods at different stores and town centres.
- Mode of transport used for shopping.
- The role of "special" forms of retailing including the internet.

- Attitudinal information about different centres.
- 2.14 The design of the survey was undertaken jointly by Hargest Planning Ltd and RMG Clarity and was implemented as a telephone interview survey by RMG Clarity in May 2013.
- 2.15 The principal benefit of a household survey is that it allows a reliable assessment of expenditure by residents of the study area which is directed to centres located both within and outwith the study area and also expenditure on "special" forms of retailing (SFT). However it cannot identify expenditure within centres located in the study area by those originating from outwith the area. This issue has been addressed by examination of the following:
- Information on the spend of tourists in North East Scotland (i.e. Visit Scotland and similar study reports and data on tourist and day visitor numbers).
 - Retail studies undertaken for residents in Angus and Moray.
- 2.16 A copy of the household questionnaire is provided at Appendix B in Volume 3.

Scope of Household Survey

- 2.17 The survey covered a range of issues relating to shopping habits and in particular sought to establish the following:

Main Food Shopping

- In which shopping centre respondents buy most of their household's main food and grocery shopping
- The most important reason for shopping in that centre
- How respondents would rate the following aspects of the centre:
 - Choice of shops for food shopping
 - Choice of shops for clothing, footwear and similar items
 - Choice of shops for household electrical items
 - Choice of shops for other items
 - Ease of getting access to the centre
 - Car parking provision
 - Public transport access to the centre
 - As an attractive place to visit for a shopping trips

- How often respondents undertake their main food shopping and in which shop or supermarket
- Those not shopping online were asked how long it took to reach the store on their last main supermarket shop and the method of transport used
- The approximate amount spent on the last main food shopping trip to their principal store
- Any other supermarket/ shop used for main food shopping

Top-up Food Shopping

- Those who undertake top-up shopping for food and grocery items were asked which store they use most for this purpose, how frequently they carry out top-up shopping and the amount spent on their last top-up shop

Non-Food Shopping

- Which town respondents use most when shopping for personal goods (e.g. clothing, footwear etc), the next most important town visited and how frequently they visit these towns for these goods
- Respondents' first and second choice when shopping for bulky goods (e.g. furniture, large appliances, DIY etc)

Purchasing Methods

- How often respondents use any of the following to purchase goods for use at home:
 - Internet (including purchases via smartphones using internet)
 - By telephone (i.e. by speaking to staff and placing an order)
 - Catalogue/ mail order
 - Mobile shops
 - Farmers' Market (or similar)
 - Car boot/ jumble/ second hand sales
 - Other methods

Aberdeen City Centre

- How respondents would rate the following in Aberdeen City Centre as a shopping destination:
 - Choice of shops for clothing and footwear

- Choice of shops for other personal goods (e.g., CDs, china, glass, jewellery etc)
- Choice of shops for furniture floor coverings and large electrical items
- Easy to travel to by car
- Easy and cheap to park
- Easy to travel to by public transport
- As a pleasant and attractive place to visit
- As a good place to combine shopping with other leisure activities (e.g. visit friends, the cinema etc)
- As a good place to combine shopping with other personal business (e.g. visit the bank/building society)

Other Cities

- Any other cities (first and second choices) visited regularly for shopping trips and the types of goods purchased there

Demographics

- Age band of respondents
- Occupation/Socio-Economic Group of chief wage earner
- Household's gross annual income
- Number of people in the household aged:
 - 0-15 years
 - 16 years and over
- Number of cars in the household
- Gender
- Quality control

Sampling

2.18 In total 3000 interviews were completed. Table 2.1 indicates the number of interviews completed by zone.

Table 2.1: Household Survey Samples

Zone	Postcode Sectors	Sample Achieved
1 + 3	AB35 5	75
	AB34 4	
	AB34 5	
2	AB33 8	75
	AB36 8	
4 + 5	AB54 4 A'shire	100
	AB54 8	
	AB55 5 A'shire	
	AB52 6 AB54 6	
6	AB53 4	75
	AB54 7 A'shire	
7	AB44 1	100
	AB45 1	
	AB45 2 A'shire	
	AB45 3 AB56 4 A'shire	
8	AB53 5	50
	AB53 6	
9	AB51 8	50
	AB53 8	
10	AB43 6	100
	AB43 7	
	AB43 8	
	AB43 9	
11	AB42 0	100
	AB42 1	
	AB42 2 AB42 3	
12	AB42 4	75
	AB42 5	
13	AB41 7	100
	AB41 8	
	AB41 9	
14	AB23 8 A'shire	75
	AB41 6	
15	AB21 0 A'shire	100
	AB21 7 A'shire	
	AB51 0	
16	AB51 3	100
	AB51 4	
	AB51 5	
17	AB31 4	75
	AB51 7	
18	AB15 8 A'shire	100
	AB32 6 A'shire	
	AB32 7	

Zone	Postcode Sectors	Sample Achieved
19	AB14 0 A'shire	100
	AB31 5 A'shire	
	AB13 0	
	AB14 0 Ab City AB31 5 Ab City	
20 W and 20 E	AB31 6	100
	AB39 3	
21	AB39 2	100
22	AB30 1 A'shire	100
	DD10 0 DD9 7 A'shire	
23	AB23 8 Ab City	75
24 N	AB21 0 Ab City	75
	AB21 7 Ab City	
24S	AB21 9	75
25	AB22 8	100
26	AB24 1	125
	AB24 2	
	AB24 3	
	AB24 4 AB24 5	
27	AB25 1	100
	AB25 2	
	AB25 3	
28	AB16 5	125
	AB16 6	
	AB16 7	
29S	AB10 7	125
	AB15 7	
	AB15 9	
29N	AB15 4	125
	AB15 5	
	AB15 6	
	AB15 8 Ab City AB32 6 Ab City	
30	AB10 1	150
	AB10 6	
	AB11 5	
	AB11 6	
	AB11 7	
	AB11 8 AB11 9	
31	AB12 3 A'shire	75
	AB12 4	
	AB12 5 A'shire	
32	AB12 3 Ab City	100
	AB12 5 Ab City	

Strategic Retail Model

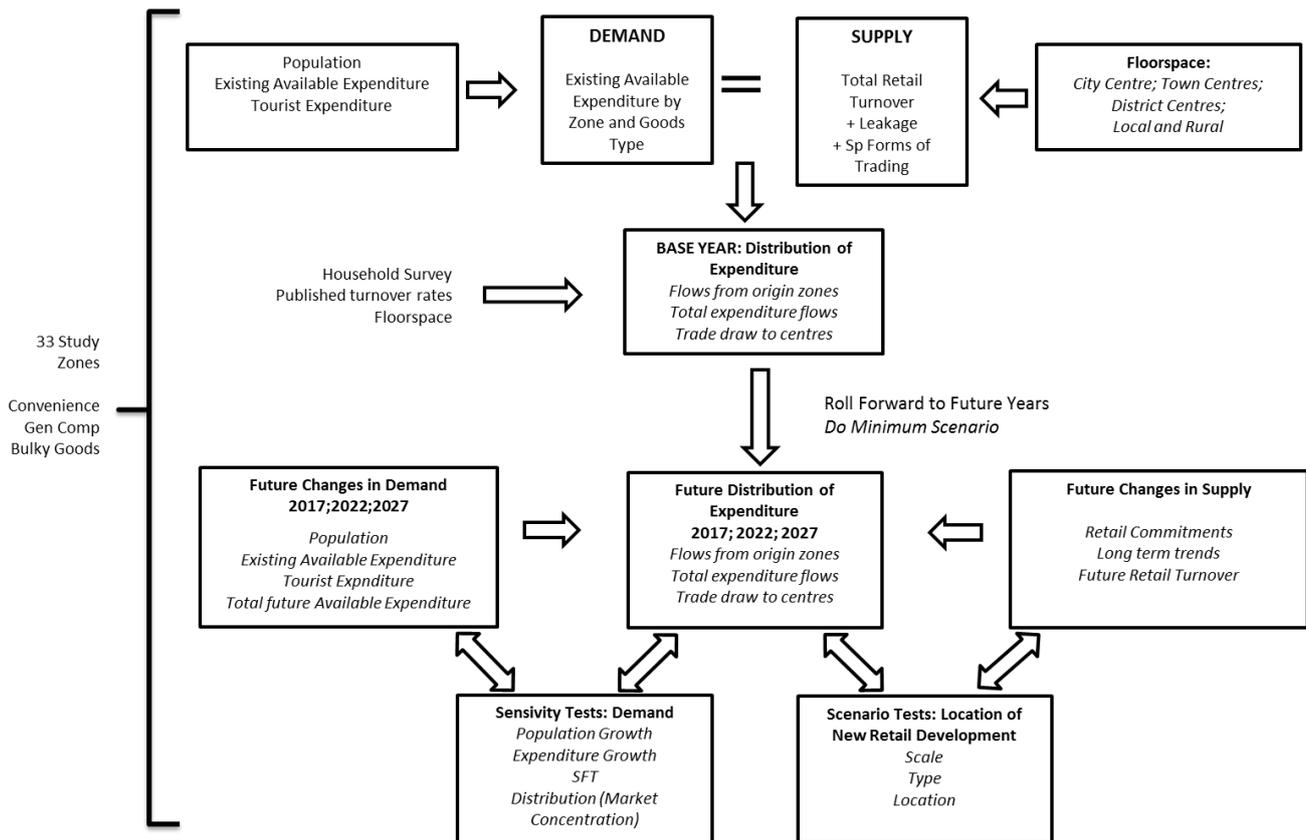
- 2.19 The purpose of the Strategic Retail Model (SRM) is to provide an analysis of the balance between demand and supply for retail expenditure/turnover within the study area for the period 2013-2027. The model is an update of the Aberdeen and Aberdeenshire SRM that was prepared for the 2004 retail study. The model identifies actual turnover levels achieved in existing/future floorspace and, as such, it is not a retail *capacity* model¹.
- 2.20 *Retail Demand.* Retail demand is expressed through changes in available expenditure arising from residents and visitors to Aberdeen City and Shire. The primary focus is on expenditure directed to the purchase of goods through conventional retail floorspace and therefore account is taken of expenditure demand that occurs through other “special forms” of retail trading including the internet. Demand also takes into account potential net inflows of expenditure from residents outwith the study area (but not staying tourists) including residents from Moray, Dundee and Angus, Orkney, Shetland and elsewhere.
- 2.21 *Retail Supply.* Retail supply is the retail turnover within existing and committed retail floorspace. It includes:
- Turnover in existing shops.
 - Turnover in “committed” future retail floorspace.
 - Purchases of goods through special forms of trading – as noted, this is discounted at the outset in the model.
 - Expenditure leakage – i.e. purchases of goods through shops outwith the study area.
- 2.22 It should be noted that “committed” floorspace has only been identified for the period to 2017 and therefore any changes in retail demand will be identified in the model thereafter are shown as changes in turnover in existing retail floorspace (i.e. changes in sales densities).
- 2.23 The principal components of the model are as follows:
- Use of 33 zones within the study area. These are used to identify areas of broadly similar retail characteristics and form the basic units for the identification of both retail demand and supply. Zones are grouped into four sub-regions – highland Aberdeenshire, coastal Aberdeenshire, Aberdeenshire (Aberdeen Housing Market Area) – also referred to as “commuter”; and Aberdeen City.
 - Identification of demand through population forecasts and forecasts of changes in available expenditure per capita.
 - Disaggregation of retail into three broad categories – convenience, general comparison and bulky goods. The study does *not* address the purchase of retail *services*.

¹ Retail capacity models are typically based on the use of notional average levels of turnover achieved by retail floorspace.

- Identification of expenditure flows from each zone to retail destinations. These flows are estimates from a combination of: household survey data; existing/committed retail floorspace; future changes in expenditure patterns (as a sensitivity test).
- Broad distribution of retail expenditure to existing/committed floorspace within general retail locations.

2.24 These issues are considered in further detail below. The overall structure of the model is set out in Figure 2.2.

Figure 2.2: Structure of Strategic Retail Model



Model Zones

2.25 In support of the analysis the study area has been divided into 33 zones. The definition of zones has been led by the location of postcode sectors and reflects those used for the 2004 AASRM and also zones used in earlier studies. The reference to postcodes allows direct application of information collected through the household survey. Zones have also been differentiated by the two local authorities and, with the exception of one zone, zones lie within one authority area. The exception to this is Zone 19 which incorporates a number of freestanding commuter settlements west of Aberdeen in Deeside.

2.26 There have been some alterations to Zone boundaries compared to the 2004 study model. This reflects both that the focus of this study is within the Aberdeen Housing Market Area (as specified in the study brief) and that major new housing allocations are proposed with the current LDPs/SDP. New zones were therefore identified to take into account the housing developments in north and west Aberdeen and also for the new settlement of Chapelton of Elsick. The zones used in the SRM are summarised in Table 2.3 which also

identifies changes compared to the 2004 AASRM . Figures 2.4 and 2.5 show the location of the Zones within the Study Area.

Table 2.3: Zone Changes compared to 2004 AASRM

Zone	Description	Changes from 2004 AASRM
1+3	<i>Aberdeenshire: Mid and Upper Deeside: Aboyne; Ballater; Braemar</i>	Zones 1 and 3 combined
2	<i>Aberdeenshire: Alford and upper Don</i>	
4+5	<i>Aberdeenshire: Huntly</i>	Zones 4 and 5 combined
6	<i>Aberdeenshire: Turriff and rural areas to west</i>	
7	<i>Aberdeenshire: Banff, Macduff and coastal areas to Moray boundary</i>	
8	<i>Aberdeenshire: Cumniestown, Garmond and rural areas</i>	
9	<i>Aberdeenshire: Fyvie, Rothienorman and rural areas</i>	
10	<i>Aberdeenshire: Fraserburgh, Strichen</i>	
11	<i>Aberdeenshire: Peterhead, Cruden Bay</i>	
12	<i>Aberdeenshire: Mintlaw, Maud and rural areas</i>	
13	<i>Aberdeenshire: Ellon, Methlick, Pitmedden</i>	
14	<i>Aberdeenshire: Newburgh, Balmeddie</i>	
15	<i>Aberdeenshire: Oldmeldrum, Kintore</i>	
16	<i>Aberdeenshire: Inverurie; Kemnay</i>	
17	<i>Aberdeenshire: Sauchen; Torphins</i>	
18	<i>Aberdeenshire: Westhill; Dunecht</i>	
19	<i>Aberdeenshire & Aberdeen City: Banchory to Peterculter</i>	
20E	<i>Aberdeenshire: Newtonhill and proposed Chapelton of Elsick</i>	Previous Zone 20 split into two parts
20W	<i>Aberdeenshire: Strachan and rural areas</i>	
21	<i>Aberdeenshire: Stonehaven</i>	
22	<i>Aberdeenshire: Laurencekirk</i>	
23	<i>Aberdeen City: Bridge of Don; Denmore Road area</i>	
24N	<i>Aberdeen City: Dyce</i>	
24S	<i>Aberdeen City: Bucksburn, Bankhead and proposed Newhills</i>	Previous Zone 24 split into two parts
25	<i>Aberdeen City: Middleton Park, Danestone. Includes Garndholme</i>	
26	<i>Aberdeen City: Old Aberdeen</i>	
27	<i>Aberdeen City: Berryden, Kittybrewster</i>	
28	<i>Aberdeen City: Mastrick; Northfield</i>	
29N	<i>Aberdeen City: west Aberdeen/Countesswells</i>	Previous Zone 29 split into two parts
29S	<i>Aberdeen City: Garthdee, Cults; Bielside</i>	
30	<i>Aberdeen City: City Centre; Torry; Aberdeen Beach</i>	
31	<i>Aberdeenshire: Portlethen</i>	
32	<i>Aberdeen City: Cove Bay; Altens</i>	

Figure 2.4: Aberdeen City Zones

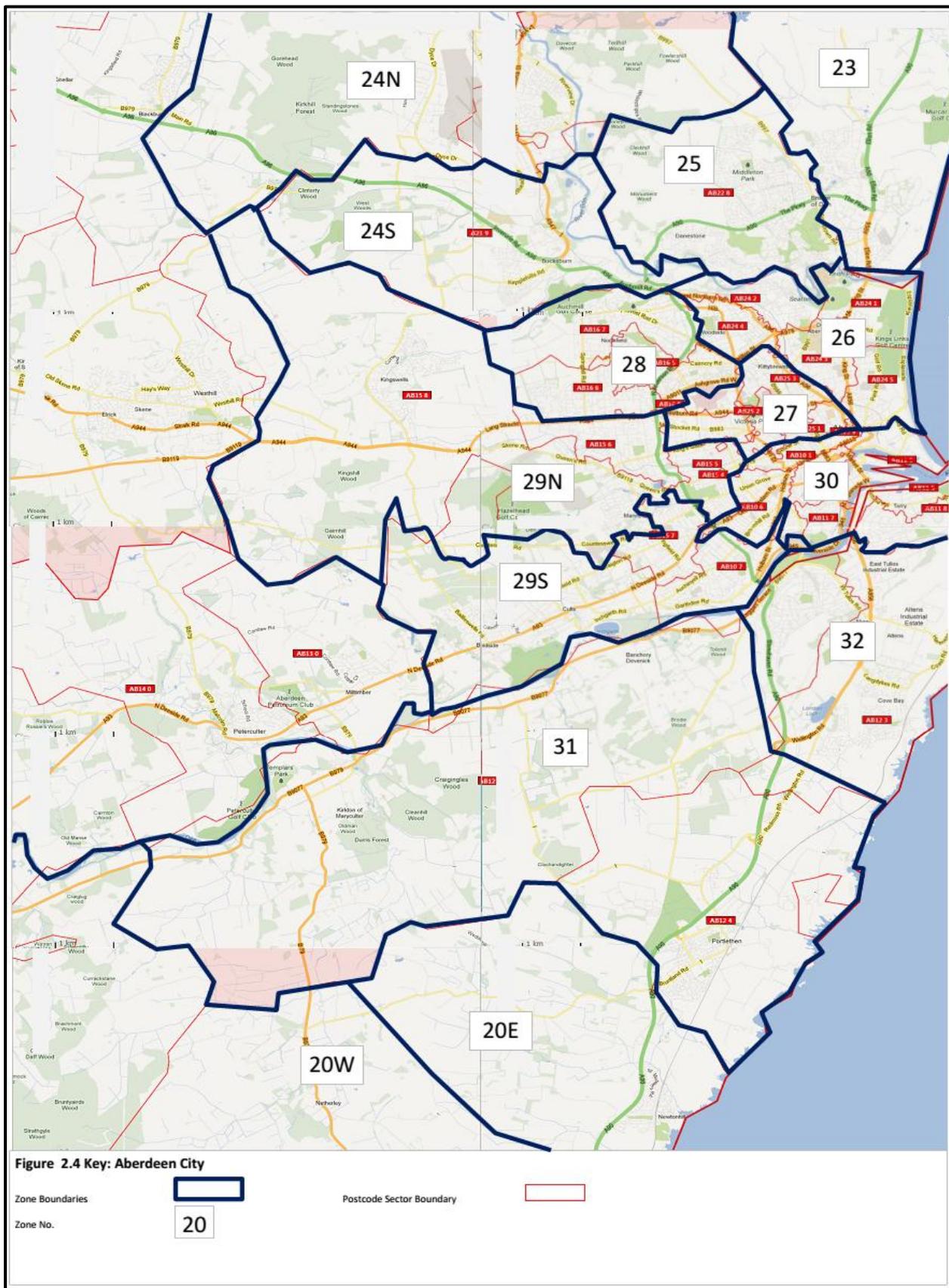
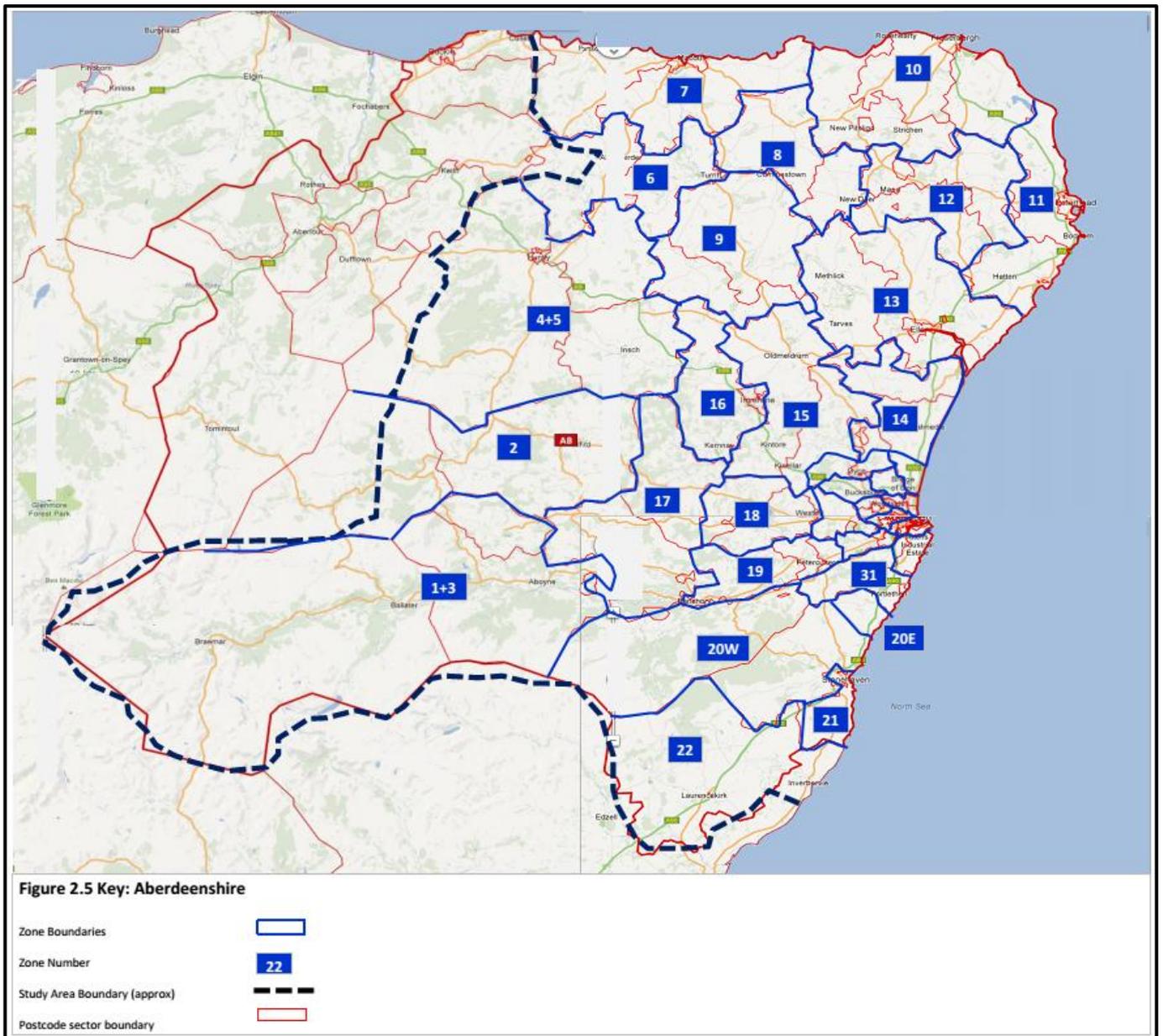


Figure 2.5: Aberdeenshire Zones



3 Trends in Retailing

Introduction

3.1 This section provides an overview of long term trends in retailing and issues that affect the retail industry which could have significant implications for retail growth and change in the study area for the period up to 2027. For the period up to 2007/8 it is evident that a series of long term trends resulting in reduced retail unit numbers but increased retail floorspace had been in place for a number of decades. However the recent recession that commenced in 2008 appears to have had particular adverse impacts on the retail sector and, the combination of these impacts with wider societal and technological changes has led to broader questioning of the role of retailing and levels of future investment in new floorspace. This has become manifest in a number of different ways – questions regarding the rate of growth of expenditure on retail goods, the impact of the internet on the need for retail floorspace, impact on the future of town centres and future investment even modern retail formats such as supermarkets and superstores.

3.2 This study focuses on the impact of long term changes rather than short-term property market concerns. This echoes the advice of Experian in their Retail Planner Briefing Note 10.1 (September 2012):

“Planning decisions for the next two decades should focus on the long term, ignoring the short-term effects of recent events. But it should be recognised that the future will not necessarily be like the past – if circumstances change the outlook changes”.

Long Term Retail Trends: 1960s - 2008

Overview of Trends

3.3 Retailing is one of the most dynamic and rapidly changing sectors within the national economy and that change has been a continuous feature since the 1950s. Key references for this review are provided in Appendix C in Volume 3.

3.4 The principal changes in retailing that have been occurring over the past decade include the following:

- A decrease in total number of shops.
- An increase in the number of large food and non-food superstores - despite increased difficulties in finding sites.
- Growth of retail sales and floorspace.
- Increase in small store formats - some of which are well suited to markets that were previously too limited for large scale retail operators.
- Increased ownership of retail businesses outwith Scotland.
- Market concentration of retail sales in less businesses and larger/most competitive retail stores and locations.

- Extension of products and services in superstores (food and non-food).
- Strengthening of primary locations and weakening of tertiary locations.
- Larger retailers taking control of the supply chain.
- Changes in accessibility to retail - particularly with concerns about reduced accessibility for the less mobile in both rural and urban locations.
- Use of technology by retailers - to control costs, develop new markets/formats and to develop customer loyalty.
- Rapid growth of internet based retailing. This is through a combination of direct delivery to the home of goods purchased over the internet with some operators having no conventional retail outlets with others using delivery from existing shops to home for goods purchased over the internet (e.g. Tesco).

Retail Numbers

Numbers of Shops

- 3.5 In terms of total numbers of shops the Federation of Small Businesses in Scotland (2005) and the New Economics Foundation (2002) identified that between 1997 and 2002 50 specialist convenience retailers closed per week in Britain. The number of independent grocery stores also declined by 25% (8,600) between 2000 and 2005. At the same time the market share of the major multiple supermarkets increased significantly.

Floorspace and Turnover

- 3.6 In contrast to the number of shops floorspace has increased, frequently at rates faster than the growth of retail expenditure. The evidence for this is mixed and an analysis of Retail Rankings for the larger UK retail operators for 2002-2008 indicate some operators with increasing sales densities while others (smaller in number) with decreasing sales densities. In general older retail space has been retired at a slower rate than new space has come to the market. The quality of space is important and the demand for good quality space has remained, in general terms, strong. In combination these factors have indicated that there is a growing gap in the productivity between new space (and those businesses that occupy this space) and old space.

Scale of Retail Activity

- 3.7 A key feature of the past fifty years has been the rapid growth of retail expenditure:
- Expenditure per capita for convenience goods has risen from approximately £1450 to £1600 (in constant 2003 prices).
 - Expenditure per capita for comparison goods has risen from less than £500 to over £3000.
 - Expenditure per capita for all goods has risen from slightly over £2000 to nearly £5000.

- 3.8 Over the same period the UK has experienced a 20% increase in population. Combining population growth with increased expenditure per capita has resulted in growth of total available expenditure of 300% in real terms. Over this period there has been shift so that most expenditure is directed towards comparison goods whereas in the 1960s it was predominantly directed towards convenience goods.

Town Centre and Out of Centre Locations

- 3.9 Reflecting trends towards concentration city/large town centres have increased in attractiveness to consumers and retailers while the inner and middle suburbs and rural retailing have declined significantly. To date this has reflected larger retailers *responding* to market demand which has been driven by increased consumer mobility – consumers are willing and able to travel to major foci of retail activity. City centres have retained their attraction but the newer edge of centre and out of centre developments are also more attractive than older shopping areas of the middle suburbs and smaller town centres. In accessible rural areas (i.e. within relatively easy reach of major towns and cities) retail provision has declined rapidly.

Concentration

Larger Unit Sizes

- 3.10 Average retail unit sizes are increasing. Based on long term trends there has been a decline in shop numbers but an increase in floorspace resulting in increases in average unit size.
- 3.11 However greater market segmentation and refined targeting of markets which is now emerging particularly in the grocery sector would indicate trends in the opposite direction – for example as a result of the roll out of convenience formats both Tesco and Sainsbury are reducing the average size of their stores. Furthermore micro-outlets can be seen e.g. M&S chilled-cabinets at railway stations as well as their association with BP at petrol stations. The Competition Commission (2007) identified that customer shopping frequency to supermarkets may have increased and they have also suggested that demographic changes appear to be supporting growth in convenience shopping with smaller households with increased proportions of elderly and single people leading to “smaller shopping missions” with more tendency to “top-up”.

Geographical Concentration

- 3.12 A key trend has been a combination of *both* decentralisation and concentration. Decentralisation in the context of market pressures to move away from existing centres (with the exception of the largest town and city centres) but concentration to both larger individual retail units and also towards larger retail centres (including established town and city centres).

Business Concentration

- 3.13 The concentration of retail activity in a small number of retailers has been a key trend. Large firms have increased their market share and small ones have declined. In 1990 the largest 10 firms had a total market share of around 33% but by 2002 this had increased to close to 40% in 2002 (Dawson 2002). Similarly Dawson identifies that 70% of trade in 1971 was undertaken by the top 29000 retailers whereas in 2000 this proportion of trade was accounted for by only the top 100 retailers.
- 3.14 Figure 3.1 shows changes in market concentration since 2000.

Figure 3.1: Market Concentration Since 2000 - Retail Rankings Data

Retail Rankings Data	Proportion of Total Retail Sales
Top 5 Retailers	
2000	29%
2005	36%
2012	35%
Top 10 Retailers	
2000	41%
2005	45%
2012	55%
Top 100 Retailers	
2000	72%
2005	81%
2012	90%

Implications of Long Term Trends for Future Retail Provision

1. Changes in Retail Organisations

- Further decreases in the number of small and micro-firms.
- Increased international activity of retailers. A greater proportion of retail in Scotland will be in companies with headquarters outwith Scotland and a smaller proportion of goods retailed in stores in Scotland will be manufactured in Scotland. However Scottish products will be sold in these businesses more widely through retail outlets elsewhere in the world. Some Scottish retailers will be successful internationally (e.g. Schuh is a recent example).
- Market concentration will continue. This will be in terms of numbers of retail businesses and also locationally. Major new retail schemes tend to be concentrated in a small number of centres. Highly accessible locations will attract market interest for new retail floorspace.
- Strongest potential for growth will be for retailers who have broad general merchandise retailing (notably the grocers but including other types of store) and the very specialist retailing while retailers that provide neither extremely wide range nor an extremely deep range will lose their appeal to shoppers.

Impacts on Retail Locations

- Successful large retailers will be operating multi-format strategies that provide retail to a number of different target markets across a range of settlement sizes. Concentration is likely to be in major city centres with an intensification of the retail core and into major out-of-town centres.
- The losers are expected to be smaller firms in the shops in: the middle suburbs (this would include local and district centres); in centres of towns that suffer strong inter-town competition; and rural

settlements/small towns that do not innovate to become specialist provides in some way. Centres that are able to adapt and innovate to establish a role will thrive/survive, those that do not will decline.

- In the larger town centres demand for space will continue – these locations will remain high cost locations. This will provide a pressure on less successful businesses who will, over time, lose space in these key locations as a result of reduced ability to pay for expensive locations to the more successful businesses.
- Pressure for out of centre space will continue for the same reasons. Requirements for larger units at comparatively low cost with access to the large majority of customers (i.e. those that have access to a private car) will always favour out-of-centre retail park development. Demand will not only be for large scale development but, in smaller markets, for smaller scale development (e.g. 5000-10000 sq m GFA) in smaller towns with rural hinterlands.
- In those towns and district centres that are less able to compete there will inevitably be a net loss of retail space. This will affect secondary locations most as the core of these centres contract. This will be reflected by increased vacancies and deterioration in environmental quality. Over time vacant units will gradually change into non-retail uses.
- In some cases secondary locations (including smaller town centres) have the potential to provide attractive and unique shops and services as well as to meet local needs including opportunities for a specialist retail offer (e.g. linked to tourism etc).

Different Types of Space

- The trend towards larger units will continue – especially for those retailers that are seeking to extend the breadth of their retail offer (supermarkets, clothing and DIY retailers). The extension of this principle is that, for the largest retail units it is possible that these will gradually evolve to potentially provide most of the full range of facilities provided in town centres i.e. retail, personal service and business, leisure, recreation and potentially even community and civic.

Summary

3.15 Based on the long term trends observed *up to 2008* the principal conclusions regarding future provision of retail floorspace were the following:

- Demand for additional retail floorspace will continue for the foreseeable future.
- Larger centres will see demand for new space (including major refurbishment – but development constraints will present a major barrier).
- Limited demand and development constraints will significantly reduce demand for new space in secondary locations including small town centres.

- Lack of new space in smaller centres will result in limited availability of space of the type preferred by larger retailers – this will underpin some demand for out of centre comparison floorspace in small retail park developments.
- Other locations are expected to see a gradual decline in retail space. There will, therefore, be a steady decline in the total number of shops in small town centres, suburban/local areas and in rural shops:
 - In the convenience sector independent specialist shops will decline as a result of competition but convenience-format stores will continue (albeit based on symbol² groups or the major grocers) as a result of lifestyle and demographic changes.
 - Retail services are expected to maintain or even increase – especially in secondary locations where occupation costs are expected to slowly decline – this may also support the development of specialist roles for centres.
 - Small independent comparison goods shops (especially general traders) will decline.
- In certain locations specialist retail locations will develop – e.g. associated with transport hubs, sports, leisure and tourist locations.

Key Issues Post 2008

3.16 Since 2008 two key factors have dominated analysis of the future growth of the retail sector and its requirements for additional floorspace. These are:

- Future economic growth and, linked to this, the growth of available expenditure for retail. This has been heavily influenced by the effects of the prolonged economic recession from 2008-2012 which has had a severe impact on certain retail sectors; and
- The impact of the internet (including use of the internet from mobile devices) and other technology changes on retail operations.

3.17 Despite the attention given to these factors in the media there are also other important changes that are affecting the retail industry in Scotland, including changes to demographics and lifestyles.

The Effects of the 2008 Recession

3.18 The retail property market over the past 5 years has, as with other sectors of the development industry, been profoundly affected by the recession. It has been affected both by the withdrawal of finance from the banks for funding new developments and also from the squeeze on household income which has reduced the growth of available expenditure for retail goods. The latter has resulted in increased numbers of retail failures and reduced demand for new retail floorspace. This has even affected the major supermarket operators – for example Tesco has been going through a process of reviewing its existing undeveloped sites and seeking to concentrating on improving its offer in existing stores.

² Symbol group is a form of retail franchise where companies act as suppliers to independent grocers and small supermarkets and produce stores which then trade under a common banner. Examples are Spar, Londis, Nisa, Costcutter.

- 3.19 Impacts have varied between prime and secondary retail locations. DTZ, in their 2011 report to the Scottish Government, consider that the total stock of occupied floorspace is about the same as the beginning of 2008 but that secondary centres have fared much worse than primary centres with increasing vacancy levels in the former but less so in the latter.
- 3.20 Retailers have focussed attention on prime locations working on the basis that they only need a relatively small number of stores in a particular part of the country (and in the main locations) in order to have sufficient presence – the result of this is that many are cutting back on their number of stores. This is complemented by transactional internet and mobile commerce sites that allow shoppers to access stores from any location at any time, and order goods. This profile would further increase concentration of retail activity in the larger retail centres and *accelerate* many of the trends identified in para 3.15 above.

Economic Prospects

- 3.21 The state of the economy and availability of disposable income are fundamental drivers for the future growth of retailing. It appears that now, after a long period lasting a number of years of slow and/or erratic growth, there is a sustained economic recovery with expenditure levels experiencing significant and strong growth.
- 3.22 The key issue for this Study is the long term economic prospect and the impact that this has on expenditure growth. In their latest Retail Planner Briefing Note³ (Sept 2012) Experian provide their own assessment of the economic outlook and the implications for the retail sector:
- **The medium-term outlook** is for economic growth to be much less buoyant than during the 12 years prior to the recession of 2008/09. They identify consumer spending growth averaging 2.5% a year (which compares to an annual average of 3.4% in 1995-2007).
 - **The longer-term outlook.** Experian suggest an ageing population will reinforce the need for on-going fiscal restraint.
 - **Alternative scenarios.** Experian provide three alternative scenarios: *optimistic scenario* (10% probability) with UK economic growth matching the previous long term trend at 2.7% per annum; *“eurocrisis scenario”* (10% probability) – economic growth derailed during to worsening of the eurocrisis – growth is limited; and *defensive households scenario* (15% probability) lower growth arises due to on-going low levels of expenditure, government restraint with increased levels of savings and repayment of debts.

Demographics

- 3.23 The Scottish population has received a considerable boost from high levels of net in-migration in the past decade and this appears to have been particularly strong in the north east. At the Scotland level this has reversed national population decline such that the total population is the highest it has ever been. Furthermore there appears to be evidence of increased growth at both the youngest and oldest age groups in certain locations.

³ The next version of Experian's Retail Planner Briefing Note (version 11) is due out late October 2013.

Lifestyle Changes

- 3.24 Consumers now use a variety of shopping channels and locations dependent upon where consumers are during the day and evening – the key driver being convenience. There are now a diversity of shopping opportunities – local, out-of-town, town centre, service station, online, travel locations, TV shopping, mobile shopping, airport retailing – and the choices are increasing all the time. The challenge for the retailer is to provide the choice of multi-channel shopping, but to make sure that overall it is a profitable model.
- 3.25 Shopping as an activity faces increasing competition from other activities including leisure pursuits. It is increasingly argued that shopping will need to be able to offer more – because shoppers have a lot more choices about how to acquire goods shops need to provide something to attract increased footfall.

Technology

- 3.26 The role of technology is of crucial importance for the retail sector. Technological change affects each of the production of goods, control of operations and ability of the consumer to interact with vendors. It has substantially reduced the costs of entry for new retail businesses – for example a high number of very small retailers have become established in recent years using Amazon or ebay as a platform for retailing goods to a very wide market.
- 3.27 From the consumer perspective smartphones and tablets are just the latest in a series of developments utilising internet access. The technology is becoming more user friendly and intuitive further increasing accessibility.
- 3.28 In the present market the most successful businesses appear to be those that have both a virtual and physical store channels. For many companies having a large number of stores is no longer viable and getting the right balance and right locational strategy with well-designed internet infrastructure is the key to commercial success.

Implications of Recent Trends for the Future of Retailing

- 3.29 Taking all of these factors into account Verdict identify the following key effects on retail growth:
- *Limited volume growth* means that the profile of a retail outlet is of crucial importance: “if you are not number one on their [the shoppers] list then you will have little chance of getting a sale”.
 - *Fewer store visits*. More online shopping equates to lower store footfall and lower store revenues, while higher costs make stores unprofitable. Space, the great driver of retail growth over the past 40 years, no longer drives growth but instead dilutes profits.
 - *High volume business under pressure*. Low price, high volume businesses will suffer as volumes but not costs fall. Furthermore retailers with low margins and high debt levels will be in peril, particularly if they have a narrow product range.
 - *Technology*. “m-Commerce” (i.e. internet-based retail using mobile phone and related technology) is growing fast and will become an integral part of shopping for all ages – retailers need mobile capability to engage with shoppers as well as sell to them.

- *Virtual replaces physical.* Retailing must be multi-channel with both the virtual and physical required. A large number of stores is less likely to be viable.
- *Reconfiguration of store portfolios.* Multiple retailers are reducing store numbers and focussing on the best locations in terms of customer numbers, footfall and profitability. This is becoming a new model – large flagship style stores with satellite stores that provide click and collect facilities, on-line access plus a transactional website and mobile capabilities.
- *Local shopping increases in importance.* Higher costs of transport, reduction in buying trips and ageing population will reduce trips to out-of-town supermarkets, retail parks and shopping centres hitting footfall and spend in these locations. Local neighbourhood locations will offer more opportunities.

Internet Based Retailing

- 3.30 The role of technological changes underpinning the current and, potentially, future growth of the use of the internet for the purchase of retail goods has been a focus of debate for the past decade. It is identified by a number of research organisations to be a key factor affecting future growth and use of retail floorspace. There is a presumption that the use of the internet, whether from computers at home, tablets computers or smartphones will increase in importance over the next few years, however, there is a divergence of view as to how important this sector will be in the longer run: will the use of the internet (or indeed other technological developments) supplant the need for traditional retail floorspace, its location and distribution or will it simply be another tool in the retailer's arsenal of retail channels?
- 3.31 Examination of historic data shows that the use of the internet for retail sales has grown from about 0.5% of all retail sales in 2002 to 9.7% in February 2013 but that the proportion of other non-store sales ("special forms of trading") has *declined* from just under 5% in 2002 to less than 2% in 2011⁴.
- 3.32 Each of the principal retail forecasters in the UK (Verdict, Experian and Pitney Bowes) all forecast that all special forms of trading (SFT) will level off as a proportion of total retail sales. It follows from this that its impact on the need to provide additional retail floorspace will reduce and the provision of new retail floorspace will revert to being driven by overall growth in available expenditure.
- 3.33 Both Experian and Pitney Bowes adopt this assumption in their forecasts of growth of SFT. PB's central case is that the proportion of SFT of all retail goods sales reaches an effective maximum in 2020-22 – from this point SFT is expected to grow in line with total expenditure growth.
- 3.34 The key points from these forecasts are:
- The presumption is that internet sales (and therefore SFT) will level off as a proportion of total sales – probably in the early 2020's. Experian indicate that all SFT will be close to 13% of total retail sales whereas Pitney Bowes identify this to be 12.5% of total sales (or 11% adjusted to take account of deliveries of convenience goods from local stores).

⁴ These figures do not take into account the role of "click and collect" which result in internet based trade directed through existing stores.

- There are serious uncertainties in these forecasts – the UK is the furthest along the curve in terms of internet usage (for retail) and therefore one cannot draw on experience from elsewhere.
- Continued high growth of internet use *will* have significant impacts in terms of the future quantum and distribution of retail floorspace.

3.35 However there are clear contrasting views about the future role of the internet. Whereas each of Verdict, Pitney Bowes and Experian all identify a levelling off of internet based retail trade within the next decade an alternative view is advocated by some commentators as leading to a fundamental shift in the nature of retailing. This alternative argument frequently is highlighted in the media. The argument of this alternative view is that internet use will, ultimately, lead to a breakdown in the relationship between floorspace and turnover and that current levels of retail floorspace will no longer be required.

Conclusion – The Future Role of the Internet for Retail

3.36 The biggest issue regarding the role of the internet is uncertainty. Examination of recent data would suggest that growth rates are declining leading to a more stable position in the early 2020s. However it may well be that the use of smart-phones (“m-retail”) is in its infancy (both by consumers and retailers) and this could rejuvenate growth.

3.37 It should also be noted, as Pitney Bowes do, that the growth of the use of the internet, combined with “click and collect” and multi-channel forms of retailing will break the relationship between sales densities and assessments of “need” for retail floorspace. If “click and collect” becomes more significant (as expected by all commentators) this will potentially result in reduced sale area requirements (i.e. goods are supplied from storage rather than sales floors) with the result that *net sales densities* could increase significantly. This is, of course, consistent with store strategies based on “flagship” plus “satellites”. It would appear most likely that the net effect of “click and collect” is to reduce net retail floor area requirements.

3.38 Although radical assumptions about the future role of internet-based retail are advocated by some commentators this is not the position of the principal retail research organisations in the UK (i.e. Experian et al). Furthermore, unlike these research organisations, the commentators proposing high growth of internet trading do not provide detailed quantitative forecasts. As a result this Retail Study adopts forecasts proposed by Experian and Pitney Bowes for the future role of Special Forms of Trading (including the internet) and adopts sensitivity tests to consider the effects of high and low SFT growth for the study area.

Retail Trends: Implications for Study Area

Key Trends

3.39 The key factors underpinning the growth of retail over the next 15 years will reflect a combination of the long term retail trends together with the changes that have been identified over the past 5 years. These can be summarised as follows:

- The fundamental business requirements will remain – to maximise business profit through balancing income with costs. Slower growth in retail expenditure will question the pursuit of maximising income at

all costs with the result that businesses, especially multiples, will pay greater attention to the control of costs, especially those associated with peripheral retail locations, to achieve maximum profit.

- Long term real growth in retail expenditure will occur but at lower rates than seen up to 2008. This will translate into reduced floorspace expansion although total retail floorspace requirements, particularly in the larger centres, will be expected to continue to grow albeit at rates lower than seen up until 2008.
- Increasing economic wealth will result in increased competition between retail and other sectors – notably leisure and entertainment. This will result in increasing proportions of town centre space devoted to retail and leisure services rather than retail goods floorspace. The ageing of society will reinforce this tendency.
- Personal mobility will continue to increase and be a key factor supporting market concentration in larger retail centres at the expense of smaller retail centres.
- The role of the internet will have significant impacts on future floorspace requirements. The internet will take an increasing share of total expenditure (at least until 2020). Furthermore new models of retailing, utilising technology, are expected to result in reduced sales area requirements – this applies whether internet sales are by delivery, “click and collect” or virtual stores. The very rapid rate of technological development will mean that it is very difficult to foresee how this will affect retail even after just a few years. There will be considerable experimentation by retailers to identify the most effective ways to utilise this for maximising turnover and profit.

3.40 These factors will have impacts on the quantum, format and distribution of retail floorspace:

- There will be a continuation (and possibly even acceleration) towards market concentration in the largest centres. This is likely to benefit Aberdeen City Centre. Although comparatively small by UK standards the level of income in the regional economy, its relative isolation from other major centres (Glasgow and Edinburgh) and strength and growth prospects of the local economy are all factors likely to make it attractive to investment. Peripherality and limited absolute size of market in a UK context may, however, result in some reluctance by London-based institutional investors to consider Aberdeen. It is not clear whether the next tier of centres within the region will benefit or lose from geographical concentration. Within Aberdeenshire rapid population growth and recent market success in Inverurie is likely to support future investment whereas more peripheral and smaller centres are less likely to benefit. In smaller centres older floorspace will be less attractive to multiples.
- In smaller traditional town centres the long term retail potential is expected to be limited. Centres may benefit from supermarket investment (either new stores or extension to stores to improve the non-food offer) but significant new investment in pure retail floorspace will be comparatively limited. This has significant implications for these centres to identify a clear role for their future viability.
- The position regarding retail warehouse space is uncertain. Bulky goods retail will remain dependent upon the housing market. Within the region this will remain buoyant in the long term however most retail occupiers of this space are national and investment decisions will be driven by the viability of UK (rather than north east Scotland) businesses and economy. So called “category killers” which have

large floorplate units focussing on single product categories (such as electricals, bookshops etc) have been demonstrated to be prone to competition from the internet. Even in bulky goods the current trend towards showroom floorspace plus internet transactions (e.g. Oakfurnitureland) point to more limited floorspace growth.

- As a result of new retail channels sales densities in existing floorspace in larger centres and retail warehouses are likely to increase – i.e. the growth of new floorspace is expected to be at a rate lower than growth in available expenditure.
- The rate of growth of floorspace for convenience goods is expected to reduce. There will still be demand for areas that remain underserved at present which includes areas of major new housing development. There will, however, be continuing demand to diversify the retail offer in supermarkets to cater for a wider non-food offer and, in the larger units, retail services. Growth of small convenience-format stores by major operators is expected to continue to reflect modern lifestyles.
- Long term retrenchment by multiples will create some opportunities for local operators in smaller centres. However these will need to be able to compete with the internet which will be (almost) impossible on the grounds of price. Therefore these businesses will succeed where they provide some or all of the following:
 - Unusual or specialist products that are difficult to identify or obtain from the internet.
 - A very high level of service (and a type of product that needs this service) that generates customer loyalty.
 - A very attractive shopping/leisure environment that makes shoppers want to visit and spend.
 - Create a brand image that attracts certain groups of consumers (e.g. youth, sports etc).
 - Tap into pass by trade otherwise attracted to a centre/location.

These businesses could be found in a variety of locations – many will be attracted to the City Centre but others could be linked to tourist locations (e.g. outdoor sports in the National Park, or golf linked to courses). In other cases the long term loss of multiples from smaller centres could create gaps in the market sufficient for smaller operators to re-enter local markets.

- In overall terms there is expected to be a slow loss of retail goods floorspace from traditional medium/smaller centres – particularly for comparison goods space. This will be a slow process and will, in part, be countered by increases in retail services.
- There will be continued opportunities for retail to be provided at specialist locations – notably transport hubs, sports, leisure and tourist locations.

Implications for the Strategic Retail Model

- 3.41 The retail model is, primarily, concerned with strategic changes in retail provision. It is not designed to identify precise changes in floorspace in individual centres, rather it is designed to identify how retail expenditure and turnover will change in locations. Having identified this one can draw conclusions regarding the implications for future changes in floorspace.

Expenditure Growth

- 3.42 The central case used in the SRM is based on the average of the Pitney Bowes Oxford Economic Forecast and Experian forecasts – both produced in September 2012 for expenditure per capita for both convenience and comparison goods. These forecasts are derived from macro-economic models of the economy and are not trend based projections. Regardless of strength of correlation coefficients there is a high likelihood that projections which derive part of their basis from historic expenditure growth will not provide a sound basis for future forecasting.
- 3.43 There remains considerable uncertainty regarding future growth and growth forecasts are regularly being changed by the UK government or others. Therefore sensitivity tests have been used which include both high and low growth alternatives.

Special Forms of Trading

- 3.44 As noted there are considerable uncertainties regarding the future growth of SFT and how the use of internet trading will impact on future floorspace requirements. Both PB and Experian produce central forecasts although only the PB forecasts take into account the effects of “Click and Collect” (for convenience goods at least. This is therefore used in the central forecast. However an alternative “high growth” forecast for internet spend is also included as a sensitivity test in the SRM.

Distribution of Expenditure Flows

- 3.45 The third area which can be considered is the extent to which expenditure flows change over time. Analysis of floorspace and questionnaire responses allows the identification of current (2013) expenditure flows and identifies the extent to which expenditure is currently directed to large centres and shops. Comparison of this to the 2004 retail model demonstrates the extent to which expenditure flows have changed over the past 9 years which assists in identifying changes in distribution of retail expenditure in the future.
- 3.46 The review of trends identified above leads to the conclusion that there will be increased market concentration in both larger centres and larger stores in future years. This has therefore been reflected in model assumptions for different types of goods categories for each of the test years.

4 Retailing in Aberdeen and Aberdeenshire

Introduction

- 4.1 This Section provides a summary and overview of retail provision in Aberdeen City and Aberdeenshire. Volume 2 provides detailed information for individual settlements and retail centres including the City Centre. These volumes provide baseline information for the formulation of the recommended Retail Strategy but this will also assist in providing data for the preparation of town centre strategies, retail impact assessments and other studies.
- 4.2 The information provided in this Section focuses on the level of retail floorspace and turnover in the study area as identified in early 2013. It should be noted that retail provision is continually changing as new retail units are provided and existing units change to non-retail uses and therefore the information contained in this section and in Volume 2 will vary over time.
- 4.3 Information in this Section includes:
- A summary overall description of the amount and distribution of retail floorspace and expenditure flows. This includes identifying total floorspace and turnover by the three principal categories of retail goods i.e. convenience, general comparison and bulky goods – these categories were defined in para 2.4 above.
 - It summaries floorspace information for retail services and vacant retail/retail service floorspace. No estimate is provided of the turnover of retail services.
 - A comparison between current floorspace and turnover and that identified in the 2004 retail study. Key changes are identified.
 - A review of the retail network identifying the principal types of retail centres and their function within the network.

Overall Distribution of Retail Floorspace

- 4.4 Table 4.1 provides a summary of retail floorspace and turnover, by principal retail goods category, for Aberdeen City and Aberdeenshire. It also identifies the floorspace located in existing town and district centres used for retail services and vacant floorspace. All floorspace information is provided through the Grampian Assessors office combined with planning authority records of the floorspace of major retail units. Information on retail turnover (expressed in 2011 prices) is derived from combining data on available expenditure (from Pitney Bowes Insight AnySite Reports) and detailed analysis of the household survey responses together with known average and typical sales density information.
- 4.5 Table 4.1 shows that the total retail provision within Aberdeen City and Aberdeenshire is as follows:
- There is 722,882 sq m retail goods floorspace. This comprises 223,881 sq m GFA convenience goods floorspace (31% of the total), 338,938 sq m GFA general comparison goods (47% of total) and 160062 sq m GFA bulky goods (22% of total).

Table 4.1: Total Retail Floorspace and Turnover – 2013 – Aberdeen City and Aberdeenshire

	No.	Convenience			General Comparison			Bulky Goods			All Goods		
		GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m
City Centre	460	23522	14665	£83.40m	156429	101587	£698.28m	20833	13499	£60.23m	200785	129751	£841.91m
Retail Services	365	12%		10%	78%		83%	10%		7%			
Vacant	66										13847		
Total	891										271847		
Town & District Centres													
1. Highland	116	5911	3785	£13.45m	8864	5757	£15.30m	5046	3280	£5.25m	19821	12822	£34.00m
Retail Services	63										5974		
Vacant	10										1338		
Total	189										27133		
2. Coastal	282	16604	10707	£45.39m	35845	23292	£68.30m	10880	7072	£14.35m	63329	41071	£128.04m
Retail Services	207										23909		
Vacant	49										4835		
Total	538										92072		
3. Aberdeenshire - Aberdeen HM	284	28511	18050	£126.40m	37602	25016	£103.06m	20725	14327	£29.15m	86838	57393	£258.60m
Retail Services	233										23815		
Vacant	20										3235		
Total	537										113887		
4. City	117	35967	21503	£281.17m	39425	25269	£126.17m	22554	15764	£40.99m	97945	62535	£448.34m
Retail Services	117										11729		
Vacant	17										2752		
Total	251										112427		
TOTAL TOWN & DISTRICT CENTRES	799	86992	54044	£466.41m	121736	79335	£312.83m	59205	40442	£89.74m	267933	173821	£868.98m
Retail Services	620										65426		
Vacant	96										12161		
Total	1515										345520		
Neighbourhood/Local/Rural													
1. Highland	41	1628	1058	£3.32m	3443	2238	£5.13m	574	373	£0.45m	5645	3669	£8.90m
2. Coastal	142	14399	16954	£15.21m	4648	3075	£7.95m	5008	3255	£3.90m	25269	24146	£27.06m
3. Aberdeenshire - Aberdeen HM	99	19703	12923	£80.68m	5665	3598	£16.54m	11135	6996	£13.47m	35940	23517	£110.70m
4. City	356	26689	17348	£40.40m	17551	11408	£28.03m	12908	8390	£10.99m	57148	37146	£79.42m
TOTAL	638	62418	48283	£139.61m	31307	20319	£57.66m	29625	19015	£28.81m	124002	88478	£226.08m
OOC Supermarkets/Superstores													
1. Highland	4	7008	4326	£33.26m	2454	1472	£6.39m	377	226	£1.38m	9839	6024	£41.03m
2. Coastal	6	14506	8970	£89.61m	4227	2609	£16.44m	757	446	£1.73m	19490	12074	£107.78m
3. Aberdeenshire - Aberdeen HM Inc Conv part of Costco	3	12030	7343	£72.00m	1452	891	£5.36m	237	154	£0.58m	9780	5828	£77.94m
4. City	9	17405	11291	£95.09m	6652	4073	£20.65m	1239	714	£3.09m	25297	16079	£118.82m
TOTAL	22	50949	31930	£289.96m	14785	9045	£48.84m	2610	1541	£6.78m	64406	40004	£345.58m

Table 4.1: Total Retail Floorspace and Turnover – 2013 – Aberdeen City and Aberdeenshire (contd)

	No.	Convenience			General Comparison			Bulky Goods			All Goods		
		GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m
OOO Retail Parks													
1. Highland	5	0	0	£0.00m	3696	2896	£13.13m	4987	3989	£4.30m	7468	5975	£17.43m
2. Coastal	1	0	0	£0.00m	3375	2194	£11.99m	3375	2194	£7.67m	11251	6948	£19.66m
3. Aberdeenshire - Aberdeeen HM Excl conv part of Costco	29	0	0	£0.00m	7610	5708	£20.25m	39427	27404	£41.81m	47037	33112	£62.06m
4. City	29	0	0	£0.00m	7610	5708	£20.25m	39427	27404	£41.81m	47037	33112	£62.06m
TOTAL	35	0	0	£0.00m	14681	10797	£45.37m	47789	33587	£53.78m	65757	46034	£99.15m
Total Retail Goods Shops Only													
1. Highland Aberdeenshire	161	14547	9169	£50.04m	14761	9467	£26.83m	5997	3879	£7.07m	35305	22515	£83.93m
2. Coastal Aberdeenshire	435	45508	36631	£150.21m	48416	31871	£105.82m	21631	14763	£24.28m	115556	83265	£280.31m
3. Aberdeenshire - Aberdeeen HM	387	60243	38315	£279.09m	48093	31699	£136.95m	35472	23671	£50.87m	143809	93686	£466.90m
4. Aberdeen City	971	103583	64807	£500.06m	227668	148045	£893.38m	96962	65771	£157.11m	428212	278623	£1,550.55m
		46%		51%	67%		77%	61%		66%			
TOTAL	1954	223881	148923	£979.39m	338938	221082	£1,162.98m	160062	108084	£239.33m	722882	478089	£2,381.70m
Total Retail Goods Shops Only													
City Centre	460	23522	14665	£83.40m	156429	101587	£698.28m	20833	13499	£60.23m	200785	129751	£841.91m
		11%		9%	46%		60%	13%		25%	28%		35%
Town & District Centres	799	86992	54044	£466.41m	121736	79335	£312.83m	59205	40442	£89.74m	267933	173821	£868.98m
		39%		48%	36%		27%	37%		37%	37%		36%
Neighbourhood/Local Rural	638	62418	48283	£139.61m	31307	20319	£57.66m	29625	19015	£28.81m	124002	88478	£226.08m
		28%		14%	9%		5%	19%		12%	17%		9%
Supermarkets/Superstores	22	50949	31930	£289.96m	14785	9045	£48.84m	2610	1541	£6.78m	64406	40004	£345.58m
		23%		30%	4%		4%	2%		3%	9%		15%
Retail Parks	35	0	0	£0.00m	14681	10797	£45.37m	47789	33587	£53.78m	65757	46034	£99.15m
		0%		0%	4%		4%	30%		22%	9%		4%
TOTAL	1954	223881	148923	£979.39m	338938	221082	£1,162.98m	160062	108084	£239.33m	722882	478089	£2,381.70m
		31%		41%	47%		49%	22%		10%			

- Total net (sales) floorspace is 478,089 sq m NFA i.e. the net area is, on average, 66% of gross floor area.
- Total retail goods turnover is £2,381.7m per annum (2011 prices). Convenience goods turnover is 41% of the total, general comparison 49% and bulky goods 10%. It follows from this data that sales densities are highest for convenience goods and lowest for bulky goods.

4.6 Table 4.1 disaggregates this information to allow the identification of retail floorspace and turnover by different types of retail location – the City Centre, town and district centres (including large village centres and local centres), retail parks (or similar) and local neighbourhood or rural floorspace. The Table also identifies the floorspace and turnover in the four sub-regions identified in the study i.e. “highland” Aberdeenshire, coastal Aberdeenshire, that part of Aberdeenshire in the Aberdeen Housing Market Area and the City of Aberdeen. As would be expected a high proportion of total retail floorspace and turnover is located within Aberdeen City but this varies according to type of retail goods: whereas 67% of general comparison floorspace (and 77% of turnover) is located within the City this figure reduces for bulky goods (61% of floorspace and 66% of turnover) and is lowest for convenience goods (44% of floorspace and 51% of turnover). This shows a clear trend that is prevalent in the study area – general comparison goods, in particular, are concentrated in the largest centres notably the City Centre whereas convenience goods are more closely related to population distribution. Bulky goods lie between the two – less concentrated in the City than general comparison but less dispersed than convenience goods.

Aberdeen City Centre

- 4.7 For this report Aberdeen City Centre is taken as the whole of the area identified as the City Centre in the Local Development Plan. This area therefore extends beyond the City Centre Business Zone. The total retail goods floorspace in the City Centre is 200,785 sq m GFA which is 27% of all retail goods floorspace in the City and Shire. Its retail goods turnover is estimated at £841.9m per annum – 35% of the total retail turnover of the study area.
- 4.8 The retail role of the City Centre is dominated by general comparison goods. These account for 78% of the gross retail goods floorspace and 83% of the retail goods turnover of the City Centre. Convenience and bulky goods account for approximately 10% of floorspace and turnover each.
- 4.9 Within the City Centre area a total of 460 retail goods shops were identified in 2013 with a further 365 retail service units and 66 vacant. This totals 891 retail and retail service units.
- 4.10 Details of the retail provision within the City Centre is provided in Section 2 of Volume 2 of this Report.

Town and District Centres

- 4.11 For this section town and district centres include all centres that perform a clear function as the centre of a community regardless of their classification in the retail network (which is discussed below). Therefore this includes all principal town centres, major district centres and centres of smaller settlements/communities which have a clear identifiable retail/retail service focus. Therefore in Aberdeenshire this includes not only the larger town centres (such as Inverurie) but also small communities (such as Kemnay or Laurencekirk). In

Aberdeen City it includes the major district centres (e.g. Berryden) and also the larger local centres (e.g. Mastrick and Cults).

- 4.12 Table 4.1 provides a breakdown of the floorspace for these centres including retail goods retail services, vacancies and retail turnover. In overall terms town and district centres are identified to account for 267,933 sq m GFA (i.e. larger than the City Centre) with turnover of £869.0m (marginally larger than the City Centre). These centres comprise 36% of retail floorspace and also 36% of turnover.
- 4.13 Summary data for all principal retail locations is presented in Table 4.2. This shows that there is very wide variation between different locations for example Inverurie has a turnover of over £123m compared to less than £3m for Culter. It should be noted that Table 4.2 includes a range of different types of retail location – not just Town and District Centres.

Supermarkets and Superstores

- 4.14 This category only identifies those supermarkets and superstores that are located outwith the City Centre, town centres and district centres (for example Tesco in Inverurie and Sainsbury in Berryden are both included *within* the relevant town and district centres and not as separate superstores). This section does include supermarkets that are located in retail parks but not identified as district/town centres (notably Asda and Sainsbury at Garthdee or Asda at Boulevard Retail Park). This section only includes supermarkets in excess of 500 sq m GFA – units smaller than this have been treated as convenience-format stores. For the purpose of this assessment this figure has also included the convenience component of Costco at Westhill.
- 4.15 This section of Table 4.1 shows that there are 22 stores identified in this category. These account for 64,406 sq m GFA (only 9% of all floorspace) and have a turnover estimated to be £345.6m (15% of all retail turnover). However they are, of course, much more significant in terms of convenience floorspace accounting for 22% of all convenience floorspace and 30% of all convenience turnover.

Retail Parks

- 4.16 In Table 4.1 Retail Parks comprise purpose built retail parks (e.g. Kittybrewster and Boulevard) and also groupings of large retail warehouse units including Garthdee, and Windmill Road, Peterhead. Supermarkets and superstores in these locations have been identified separately.
- 4.17 In total 35 retail warehouse units in this category are identified most of which are in Aberdeen City. In total these account for 65,757 sq m GFA (9%) of all goods floorspace and £99.2m turnover (4% of total). In the overall scale of retail provision these therefore have limited overall significance. However they are important for bulky goods floorspace accounting for 30% of total bulky goods floorspace and 22% of bulky goods turnover.
- 4.18 It could be considered that, in order to understand the significance of modern retail units in out of centre locations within the study area, one should consider the supermarkets/superstores category together with the retail parks category. If one undertakes this analysis it can be seen that these units total:

- 130,162 sq m GFA = 18% of the total retail goods floorspace

- £444.7m turnover = 19% of total turnover.

Local Shopping Floorspace

- 4.19 The other category included within Table 4.1 is all other local, neighbourhood and rural floorspace. This primarily comprises small independent shops and services but also includes large units such as garden centres. In total 638 retail units are identified in this category – that is over one third of all units. However in terms of floorspace and turnover their significance is much less – they account for 17% of all floorspace and only 9% of turnover. They are, however, more important for local convenience provision accounting for 28% of floorspace and 17% of turnover.

Retail Services

- 4.20 Retail services cover a wide range of personal, catering and financial services and facilities within centres. In total they are identified to occupy 122,641 sq m floorspace within the city, town and district centres within the study area that is 20% of the total retail goods, services and vacant floorspace. In total there are 985 retail service units identified within the city, town and district centres (although there are many outwith these locations) – that is over 40% of all units in the centres are providing retail services. They are particularly important in smaller town centres and, as is seen in the review of centres in Volume 2, their importance in smaller centres has increased significantly over the past decade.

Vacant Units

- 4.21 According to the Grampian Assessor records there is currently 26,008 sq m of vacant retail goods and retail services units within the city, district and town centres. This equates to a vacancy rate, by floorspace, of 5%. It is likely that this floorspace figure slightly underestimates the scale of vacancies in certain towns and that the actual vacancy rate is in the region of 6-7% by floor area.
- 4.22 The numbers of vacant units were identified by combining Assessor data with surveys of the principal centres within the Aberdeen HMA area (City and Shire). This identifies 162 vacant units in these centres which is a vacancy rate of 6.7% by number of units. These figures are significantly lower than either Scottish or UK average vacancy levels. There are some difficulties in comparing these figures with UK national figures as a result of differences in definitions - UK figures are currently typically identified to be 14% by numbers of units or even higher. Hargest Planning Ltd data, using the same definitions as used in the current study, indicate average Scottish vacancies in the range of 10-12% by number of units at the current time. This implies that the vacancy rate for the study area as a whole is *well below* UK and Scottish average levels whether measured by numbers of units or by floorspace. As will be seen in Table 4.8 below it is also evident that, across the study area as a whole, there has been a *reduction* in vacant retail floorspace using the Grampian Assessor data – this contrasts with the position for the whole of the UK and Scotland where vacancies have increased.

Principal Retail Locations

- 4.23 Table 4.2 identifies the principal retail locations within the study area. As well as identifying quantitative retail data for each location (numbers of retail and retail service units, floorspace and turnover) it also summarises the type of retail goods shops available and additional services and facilities available within the centre. Each of these factors has been used in the analysis of the retail network and the categorisation of centres.
- 4.24 Figures 4.3 to 4.6 provides maps of the study area showing the relative size of retail locations first in terms of floorspace (Figures 4.3 and 4.4) and then by retail goods turnover (Figures 4.5 and 4.6). The size of the “pies” for each location is directly proportional to the total floorspace or turnover. In this way the importance of the City Centre as a retail location can be identified as well as the larger town and district centres. These four figures also include a number of smaller centres (notably smaller rural town centres) which are not included in Table 4.2.

Available Expenditure, Turnover, Leakage and Retention

- 4.25 The SRM allows the identification of the overall expenditure flows into and out of the study area. These are summarised in Figure 4.7 below.
- 4.26 Figure 4.7 shows that, if one discounts expenditure directed towards special forms of trading (notably the internet) then the expenditure inflows generally match outflows that is the net expenditure and turnover generated by tourists is broadly balanced by leakage of expenditure to other centres (i.e. from those living close to retail centres outwith the study area or expenditure directed to larger retail centres such as Glasgow or Edinburgh). The difference between retail turnover and available expenditure is therefore largely accounted for by expenditure directed to special forms of trading.

Table 4.2: Principal Retail Locations

	Location	Zone	2013 Total Goods	No. of Units					Total Retail Goods and Retail Service Floorspace	Additional Services and Facilities in Centre	Range of Retail Goods Shops
				Convenience	Comparison	Service	Vacant	Total			
City Centre	City Centre	26/27/30	£841.91m	75	385	365	66	891	271847 sq m	All categories with extensive choice	Wide ranging
Highland	Aboyne	1+3	£7.10m	3	9	13	0	25	3605 sq m	Most categories	Limited
	Alford Town	2	£5.46m	4	12	12	2	30	4732 sq m	Limited retail offer	Limited
	Ballater	1+3	£5.47m	6	28	10	1	45	4372 sq m	Most categories	Limited
	Huntly	4+5	£12.43m	10	37	22	6	75	12180 sq m	Most categories with choice; multiples and independents	Good range
	Insch	4+5	£3.54m	4	3	6	1	14	2244 sq m	V limited - esp comparison	Limited
Coastal	Banff	7	£29.01m	10	36	31	7	84	17131 sq m	Most categories with choice; multiples and independents	Good range
	Fraserburgh	10	£33.00m	19	57	64	23	163	25432 sq m	Almost all categories with choice; independents and multiples	Wide range
	Fraserburgh OOC - Maconachie Rd	10	£59.85m	2	2			4	9176 sq m	Lidl, Argos, Acorn, Tesco	None
	Macduff TC	7	£3.54m	6	19	15	0	40	5133 sq m	Limited retail offer	Limited
	Mintlaw	12	£1.67m	4	2	7	2	15	1824 sq m	V limited - esp comparison	Limited
	Peterhead	11	£36.12m	14	69	60	15	158	27889 sq m	Almost all categories with choice; independents and multiples	Wide range
	Peterhead OOC (large units only)	11	£71.71m	3	3			6	18150 sq m	4 locations - largest only has 3 units	None
	Turriff	6	£22.54m	14	32	30	2	78	14663 sq m	Most categories with choice; independents but few multiples	Reasonable range
Commuter	Banchory	19	£12.52m	7	34	28	2	71	8578 sq m	Most categories with choice; multiples and independents	Some additional facilities
	Ellon	13	£12.13m	7	31	36	2	83	12737 sq m	Most categories	Good range
	Inverbervie	22	£4.36m	6	5	4	1	16	2876 sq m	V limited - esp comparison	Limited
	Inverurie	..	£120.52m	13	61	50	5	129	40042 sq m	Most categories with choice; multiples and independents	Good range
	Inverurie OOC	16	£23.79m	1				1	3469 sq m	Superstore only	None
	Kenmay	16	£1.42m	4	4	8	0	16	1768 sq m	V limited - esp comparison	Limited
	Kintore	15	£1.27m	3	3	6	0	12	859 sq m	Limited retail offer	Limited
	Laurencekirk	22	£7.02m	5	12	14	2	33	4349 sq m	V limited - esp comparison	Limited
	Oldmeldrum	15	£2.88m	3	6	11	2	22	2331 sq m	V limited - esp comparison	Limited
	Portlethen	31	£67.33m	3	7	13	1	24	22956 sq m	Limited retail offer	Limited
	Stonehaven	21	£13.96m	15	35	47	4	101	11314 sq m	Most categories with choice; multiples and independents	Good range
	Westhill	18	£15.19m	4	9	16	1	30	6078 sq m	Limited retail offer	Limited
	Westhill OOC	18	£66.36m	1	1			2	16162 sq m	Tesco + Costco	Limited

Table 4.2: Principal Retail Locations (contd)

	Location	Zone	2013 Turnover	No. of Units					Total Retail Goods and Retail Service Floorspace	Range of Retail Goods Shops	Additional Services and Facilities in Centre
				Convenience	Comparison	Service	Vacant	Total			
City	Berryden DC & RP	27	£107.68m	1	12	2	1	16	24913 sq m	Limited retail offer	Limited
	Boulevard RP	30	£73.65m	3	8	0	0	11	22644 sq m	Limited retail offer	None
	Bridge of Don/Denmore	23	£17.35m	9				9	19822 sq m	Limited retail offer	None
	Cults DC	29S	£6.18m	3	11	15	2	31	4786 sq m	Limited retail offer	Some additional facilities
	Culter DC	19	£2.61m	4	6	11	1	22	2227 sq m	Limited retail offer	Some additional facilities
	Danestone DC	25	£76.93m	2	1	5	0	8	13919 sq m	Limited retail offer	None
	Dyce DC	24N	£48.97m	2	3	5	2	12	10268 sq m	Limited retail offer	Limited
	Garthdee RP	29S	£156.34m	2	3	0	0	5	34892 sq m	Limited to 5 major units	None
	Kittybrewster RP	26	£26.05m	0	12	0	1	13	17044 sq m	Limited retail offer	None
	Mastrick DC	28	£5.64m	7	4	11	1	23	3791 sq m	Limited retail offer	Some additional facilities
	Middleton Park	25	£28.36m	1	0	6	0	7	5787 sq m	Limited retail offer	Limited
	Rosemount TC	27	£12.34m	10	33	41	4	88	8518 sq m	Most categories	Some additional facilities
Torry TC	30	£5.92m	8	14	32	7	61	5552 sq m	Most categories	Reasonable range	

Figure 4.3: Aberdeen City – Retail Floorspace 2013

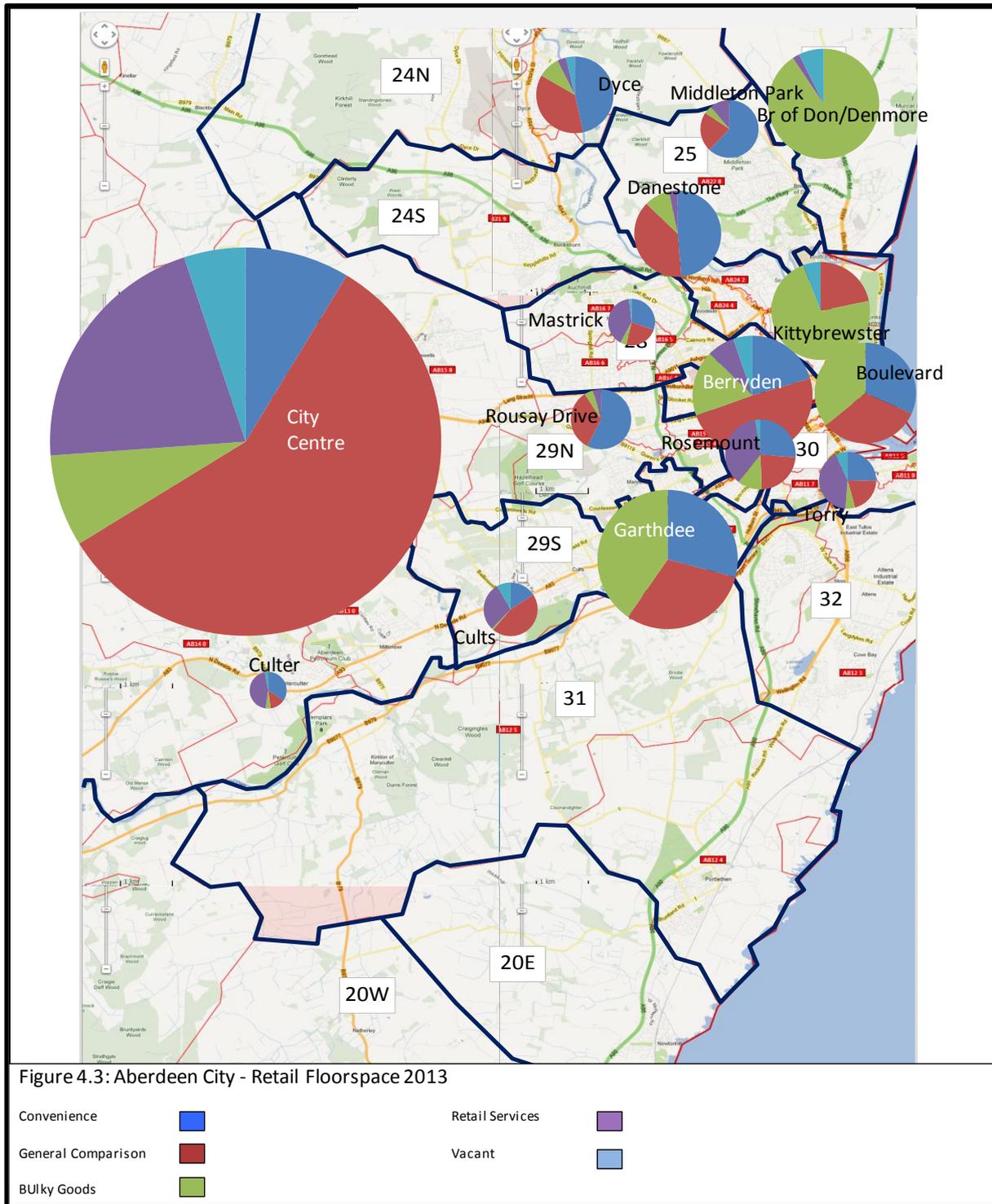


Figure 4.4: Aberdeenshire – Retail Floorspace 2013

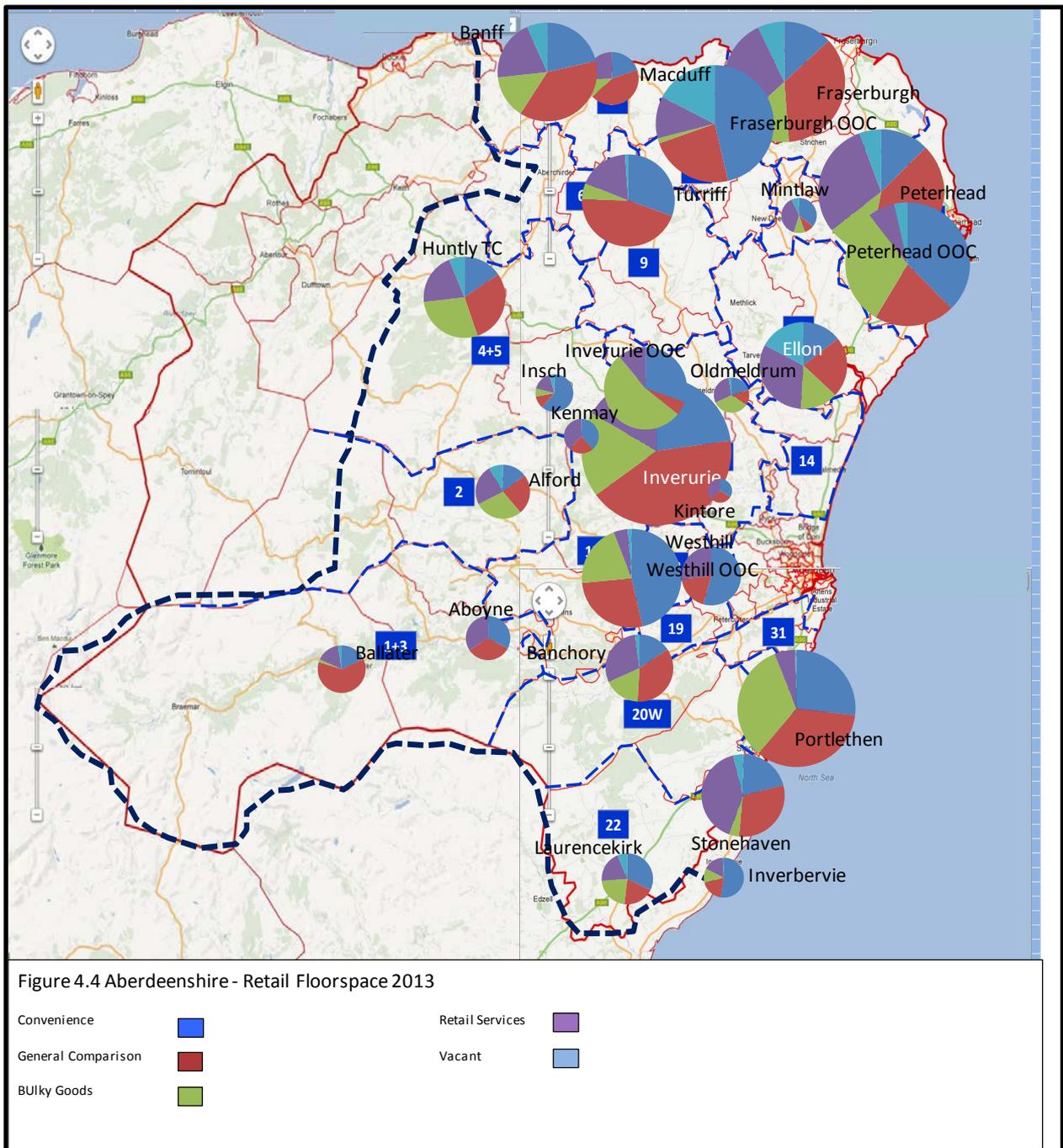


Figure 4.5: Aberdeen City – Retail Turnover 2013

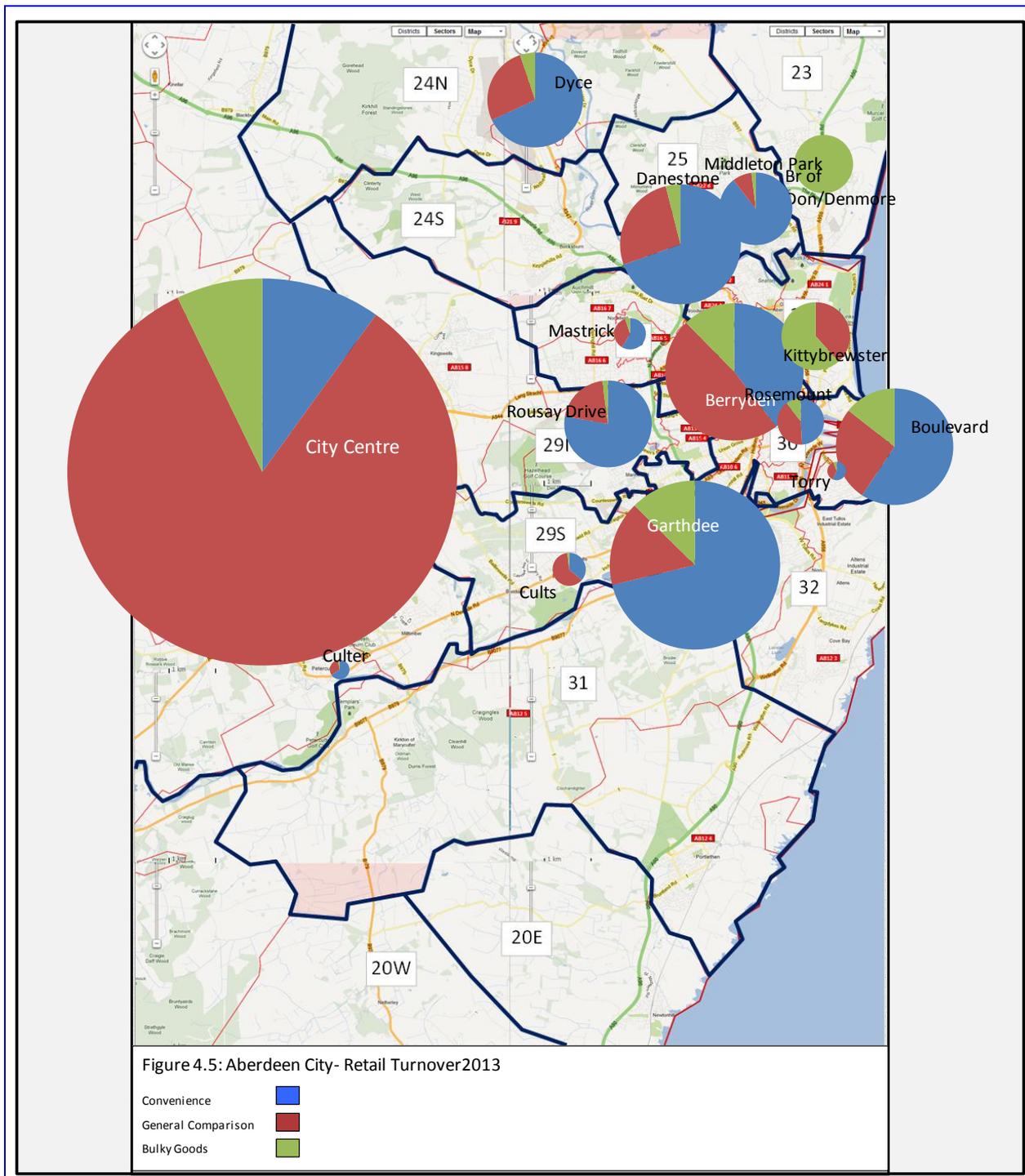


Figure 4.6: Aberdeenshire – Retail Turnover 2013

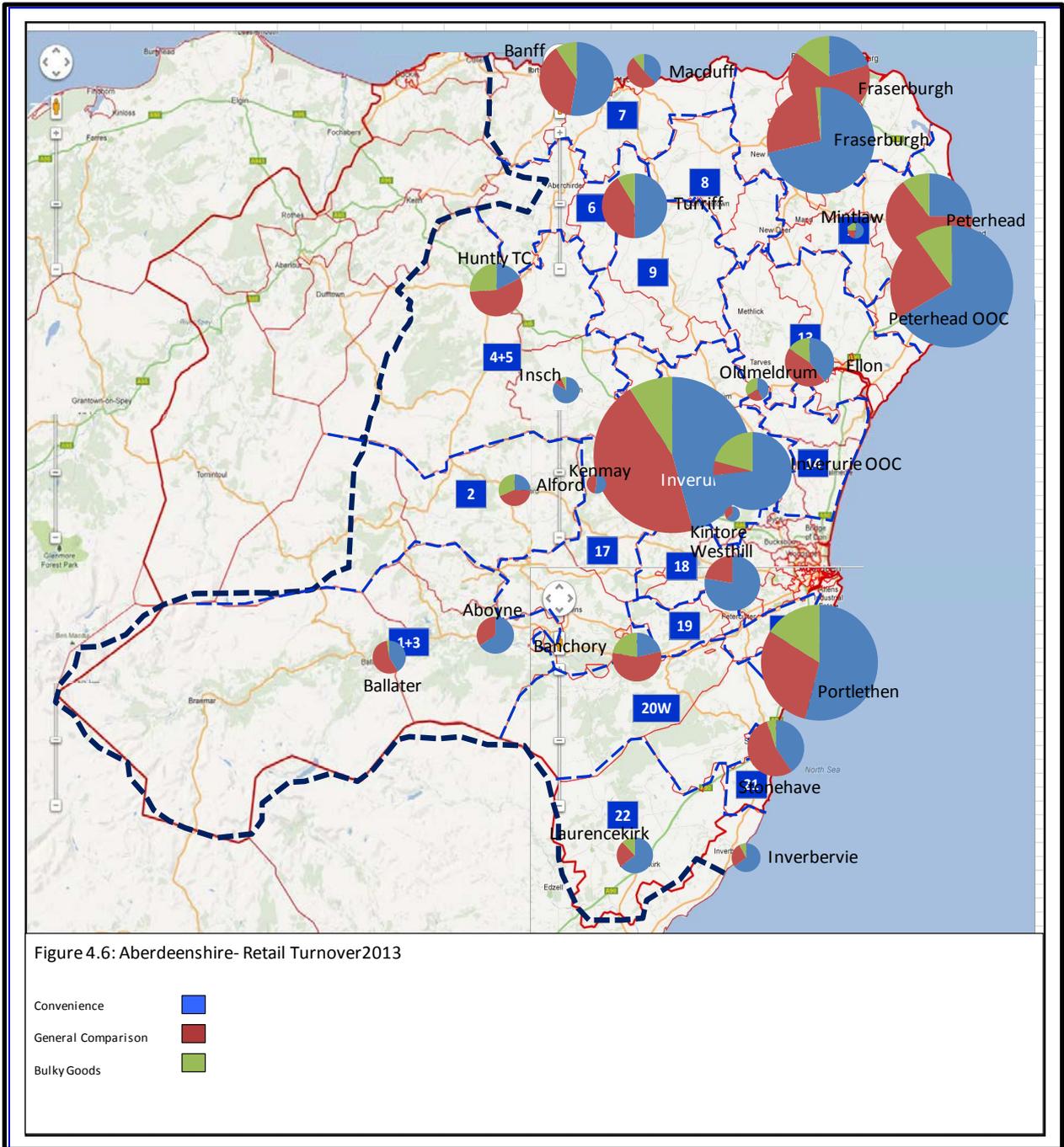
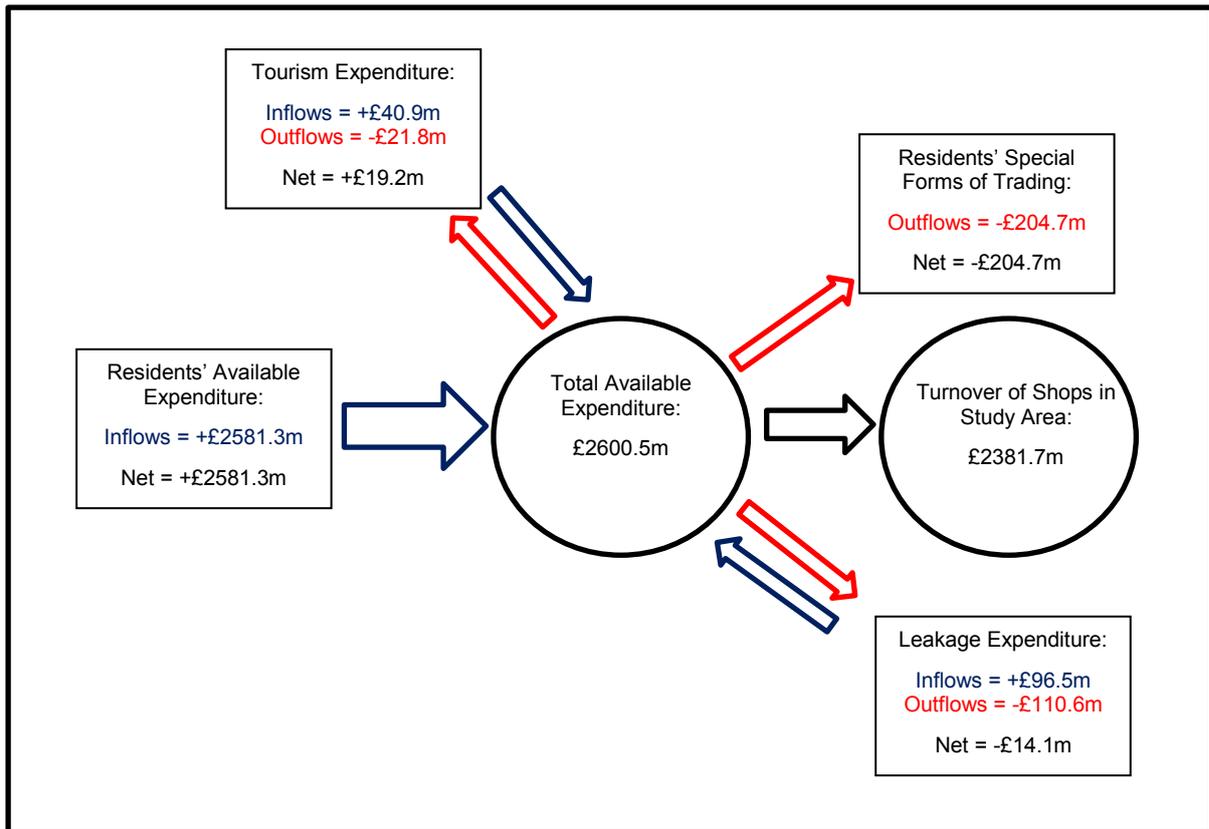


Figure 4.7: Study Area Expenditure Flows and Turnover – 2013



Changes Since 2004

Changes for the Whole Study Area

- 4.27 A general picture of change over the past decade can be identified from comparing the data from the SRM with that prepared for the 2004 AARS study. This information is set out in Table 4.8. Data from the 2004 study has been rebased to 2011 prices.
- 4.28 The Table shows that estimates of available expenditure for convenience goods have declined by 13% between 2004 and 2013. The scale in drop of available expenditure may appear surprising but the figures are directly in line with data published by Pitney Bowes in the latest Retail Expenditure Guide taking into account population growth. Convenience expenditure per capita peaked in 2006 and has declined in real terms since that data. In contrast there has been a rapid growth in available expenditure for general comparison goods of 78% but expenditure for bulky goods has remained broadly flat (slight increase). The overall scale of growth has been higher than identified by Pitney Bowes for all comparison goods – the growth for all comparison goods within the study area over this period is 59% from Table 4.8 but the equivalent per capita figure from Pitney Bowes is 31%. The difference can be explained as a result of above average population growth and increasing relative affluence within the study area as a whole over this period.
- 4.29 Turnover changes closely reflect the changes in available expenditure i.e. decline in convenience goods turnover, rapid increase in general comparison turnover and slight increases in bulky goods turnover.

4.30 The position with turnover changes needs to be contrasted with the changes in retail floorspace that have occurred over the same period. These show that there has been a significant increase in convenience floorspace (+18%), a similar increase in general comparison floorspace (+20%) and a decline in bulky goods space (-19%). These changes take into account shifts in the use of space within existing shops (including reduced areas for convenience goods and increases in comparison goods in supermarkets and superstores, and changes from bulky goods to general comparison goods in retail warehouses).

4.31 The increase in convenience floorspace is explained through the growth of supermarkets and superstores primarily in Aberdeenshire as retailers have sought to extend market catchments to local areas. Therefore retailers have increased market share through new development at a local level despite global reductions in convenience retailing. The result of this is average sales densities declining putting pressure on weaker businesses. In contrast comparison goods floorspace has not matched growth in expenditure resulting in higher sales densities. Because of the nature of market concentration for general comparison goods, despite growth in markets, development viability remains difficult in locations other than the largest towns and the City. In these secondary locations comparison floorspace is normally only possible where development costs are low – i.e. in out-of-centre locations and even here only the stronger markets are favoured. Aberdeen City presents a different situation but it is only recently that proposals have come forward for significant comparison floorspace (e.g. at Denmore Road). The other key factor is that the City Centre is clearly the strongest location for new comparison floorspace but the time and investment required to bring sites together in the City Centre has meant that the delivery of space has not matched growth in the market. As a result general comparison sales densities have increased significantly in real terms between 2004 and 2013.

Table 4.8: Expenditure, Turnover and Floorspace Changes – Study Area 2004-2013

Total Available Expenditure £m (2011 prices)									
	2004			2013			Change 04-13		
	Net SFT	SFT	Total	Net SFT	SFT	Total	Net SFT	SFT	Total
Convenience	1156.0	11.7	1167.7	1000.2	19.0	1019.1	-13%	62%	-13%
General Comparison	674.3	60.2	734.5	1155.8	153.3	1308.1	71%	155%	78%
Bulky Goods	241.4	21.6	263.0	241.0	32.4	273.3	0%	50%	4%
Total	2071.7	93.5	2165.2	2397.0	204.7	2600.5	16%	119%	20%
Turnover £m (2011 prices)									
Convenience	1136.9			979.4			-14%		
General Comparison	677.4			1163.0			72%		
Bulky Goods	234.6			239.3			2%		
Total	2048.8			2381.7			16%		
Gross Floorspace									
Convenience	190249			223881			18%		
General Comparison	283612			338938			20%		
Bulky Goods	196929			160062			-19%		
<i>Total Goods</i>	<i>670790</i>			<i>722881</i>			<i>8%</i>		
Retail Services	186412			169198			-9%		
Vacant	59984			46104			-23%		
Total Goods and Services	917186			938183			2%		

4.32 The Table also shows that, over the period 2004-2013, there has been a modest decline in retail services (reflecting a substantial drop in retail services outwith town centres) and also a decline in vacancies.

Changes in Towns

4.33 Changes in retail floorspace and retail turnover have varied enormously between different retail locations within the study area. This is seen in Figures 4.9 and 4.10 which show the percentage changes in retail goods floorspace (Fig 4.9) and retail goods turnover (Fig 4.10). It should be noted that the figures indicate percentage change – therefore centres with a low base and with even limited amounts of new floorspace will register significant growth.

4.34 Figure 4.9 shows change in retail goods floorspace. This indicates the contrasting fortunes between different locations within the study area:

- Highest growth (in percentage terms) has been in out-of-centre locations in Aberdeenshire. The high growth of Inverurie reflects the development of the retail park which has subsequently been included within the defined town centre and therefore could be considered to overstate growth in this location (the retail park is also included in the town centre data showing growth of over 60%). Other out of centre locations showing high growth are Fraserburgh and Peterhead.
- Some town and district centres have registered significant growth – a key part of this is the reduction in vacant floorspace (notably Turriff and Banff) and also redevelopment of existing units (e.g. Danestone, Westhill or the City Centre).
- However others have experienced decline due to range of different factors: Portlethen (due to large units becoming vacant) and Fraserburgh, Rosemount and Torry (as a result of more general factors including the shift from retail goods shops to services).

4.35 Figure 4.10 presents a different picture:

- High growth is identified for Boulevard and Turriff as a result of changing retail operators (Asda in Boulevard and Tesco in Turriff) resulting in higher turnover than previous operators. Others experiencing growth are those centres with a greater proportion of turnover derived from general comparison goods which have benefited from market growth.
- In contrast locations that have declined are those where turnover is dominated by convenience floorspace including centres in north Aberdeen (Danestone, Dyce and Middleton Park) which have been affected by increased competition from supermarkets and superstores in Aberdeenshire. It also shows that those centres that have seen a decline in floorspace have also resulted in reduced turnover.
- The figure also shows the general decline in retail goods floorspace in the smallest centres.
- The situation with Westhill is slightly unusual with an increase in retail floorspace but decline in total turnover. This reflects the impact on the Tesco superstore on town centre convenience floorspace resulting in trade diversion which exceeds the additional turnover associated with new retail floorspace in the town centre.

Figure 4.9: Total Retail Goods Floorspace Change – Retail Locations 2004-13

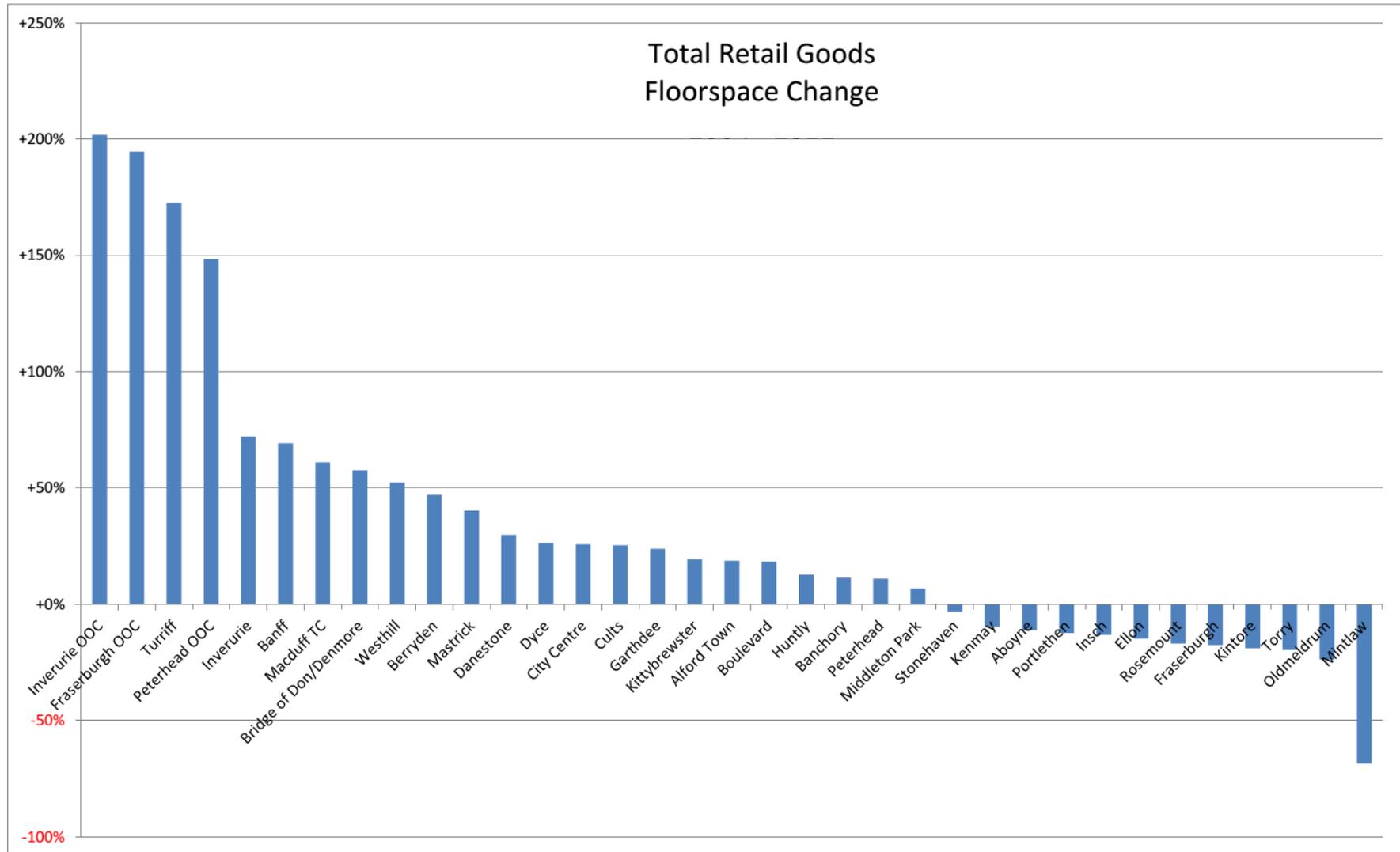
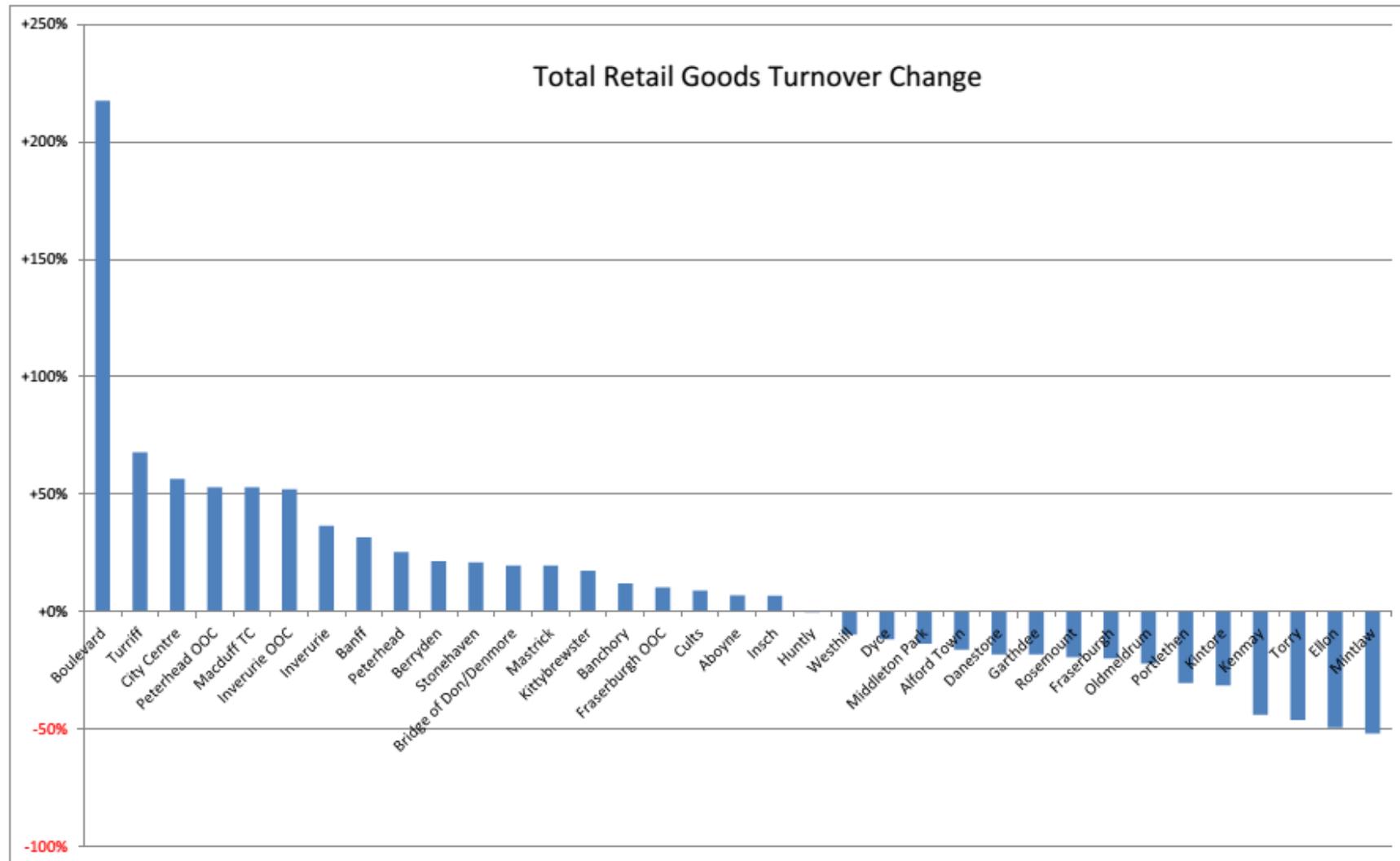


Figure 4.10: Total Retail Goods Turnover Change – Retail Locations 2004-13



Future Expenditure, Floorspace and Turnover

4.36 The SRM uses information to identify future turnover in existing centres. This is based on the following:

- Forecast changes in available expenditure (based on forecast changes in population, expenditure per capita and the role of special forms of trading).
- Changes in the pattern of expenditure flows – in particular increased market concentration favouring larger centres/units compared to smaller ones.
- Retail floorspace commitments.

Available Expenditure Changes

4.37 The implications for expenditure growth and special forms of trading were reviewed in Section 3. The central case used for the retail model identifies the following growth in available expenditure:

- *Convenience Goods*: the central case identifies modest growth from 2013 to 2022 of +10% and +16% to 2027 (range in 2027: +11% to +27%).
- *General Comparison Goods*: the central case identifies high growth from 2013 to 2022 of +40% and +71% to 2027 (range in 2027: +32% to +114%).
- *Bulky Goods*: the central case identifies high growth from 2013 to 2022 of +41% and +73% to 2027 (range in 2027: +33% to +116%).

4.38 These forecasts are derived directly from the forecasts produced by Pitney Bowes/OEF and Experian (reviewed above). They differ from the changes that have been observed in the period 2004-2011 because of the major impact that the recession has had on retail expenditure growth over the period 2008-2011 as summarised in Table 4.8.

4.39 There is increasing uncertainty with the forecasts for the period from 2022-2027 therefore limited consideration has been given to these. However, even for the period 2013-2022, the forecasts indicate significant growth in available expenditure especially for comparison goods. This occurs even taking into account the principal forecasts for continuing growth in the use of the internet for retailing (as noted in paragraph 3.50 above). All other things being equal one would expect retail turnover in existing retail locations to match this scale of growth.

Patterns of Expenditure Flows

4.40 Long term trends reviewed in Section 3 have indicated that there is an expectation that there will be greater concentration of retail activity in larger retail units and centres. For convenience goods this is likely to be less significant because of the comprehensive network of major stores already available within the study area and recent trends supporting local convenience-format stores. However for comparison goods the current trends are reinforcing the role of major centres (this would include the City Centre, major retail parks and larger town/district centres). These trends would result in even higher rates of growth of retail turnover in the largest

centres (notably the City Centre) and slower growth in smaller centres and local/neighbourhood/rural floorspace.

Retail Commitments

- 4.41 There are currently a large number of retail schemes that have been granted planning permission or are identified as retail development sites in the Local Development Plans. Because there is limited planning policy impediment to the implementation of these schemes they are all treated as retail “commitments” for the purpose of this study. The full list of retail commitments identified in Spring 2013 is provided in Table 4.11. Where planning permission has been granted details of the proposed floorspace is available and this is set out in the Table. Where the proposal is an allocation, or only general information has been provided, an assessment has been made of the scale and type of floorspace likely to be accommodated in the proposal. For the purpose of the study it is assumed that nearly all the proposals could be implemented by 2017 (the exception is the proposal at Haudegain Triangle where it is assumed implementation would be by 2022).
- 4.42 Table 4.11 shows that there is a substantial amount of retail floorspace included within the list of retail commitments. In total 60,361 sq m GFA retail goods floorspace is identified – 64% in Aberdeenshire and 36% in Aberdeen City. Furthermore 48% of the proposed retail floorspace is for convenience goods and only 29% for general comparison and 23% of bulky goods.
- 4.43 Retail commitments will have a direct impact on existing retail locations and centres. They will divert trade away from competing proposals and this trade diversion will, in certain cases, exceed the increases in retail turnover that would arise from increased available expenditure. This will be most significant with the proposed convenience floorspace. The proposed scale of new convenience floorspace is about the same net increase in floorspace that has been developed in the period 2004-13 and represents a 13% increase in gross convenience floorspace. In contrast the growth in available expenditure for the period to 2017 is identified to be only 10% and 16% up to 2023. It is inevitable therefore that, if all this space is developed, there will be many locations that will see a real decline in convenience turnover.

Overall Effects on Future Turnover

- 4.44 The strategic model has drawn each of the above factors together to assess the anticipated future changes in turnover in existing centres. This assessment is conditional on no other floorspace coming forward (other than that identified as a commitment). This shows that, for comparison floorspace (both general and bulky) turnover will increase significantly. It will be fastest in the City Centre and those locations with retail commitments for comparison floorspace. In contrast for convenience turnover there will be redistribution – growth in those centres/locations with proposals for new floorspace and decline elsewhere. Turnover is identified to increase significantly for all types of retail goods.
- 4.45 The principal purpose of this analysis is to set out the “do minimum” position in terms of strategies for the provision of new retail floorspace to reflect the identified increase in demand. It is the “do minimum” because it assumes that the only implemented floorspace will be that already granted planning permission or allocated in the development plans and does not allocate any further space. This is an important exercise to undertake because it allows the identification of potential retail deficiencies and the scale of additional new floorspace that could be identified in the proposed retail development strategy. This is addressed in detail in Section 5.

Table 4.11 Retail Commitments

Zone	Location	Proposed Development	Trading by	Conv		GC		BG		Total		
				GFA	NFA	GFA	NFA	GFA	NFA	GFA	NFA	
Aberdeen City												
23	Site 4 Denmore Road	Unrestricted Class 1	2017	4560	2736	2280	1368	380	228	7220	4332	
23	Dubford	Class 1	2017	392	255	118	76			510	331	
26	390-406 Great Northern Road	Convenience Format Foodstore	2017	230	160					230	160	
28	Haudegain Triangle	Retail Park	2022			3250	2438	3250	2438	6500	4875	
29N	Hazlehead Nurseries	General Comp	2017			500	400			500	400	
32	Souter Head Road, Cove	Residential or retail opportunity	2017	4313	2588	1150	690	288	173	5750	3450	
32	Wellington Road (E)	Class 1	2017	702	456	210	137			912	593	
Aberdeenshire												
6	Market St, Turriff	Supermarket	2017	2560	1536	640	384			3200	1920	
7	Canal Park, Banff	Supermarket (Tesco)	2017	3219	1932	858	515	215	129	4292	2576	
10	Watermill Road, Fraserburgh	Supermarket (Asda)	2017	3458	1748	922	466	231	117	4610	2331	
11	Kirkburn Mills, Peterhead	Mixed class 1 retail	2017	1308	811	1792	1218	1465	1015	4565	3044	
11	Asda, Peterhead	Extension/	2017	489	367	1271	954	196	147	1956	1467	
11	Buchan Gateway, Peterhead	Bulky goods retail warehousing	2017					4645	3484	4645	3484	
11	St Peter Street, Peterhead	3 non-food retail units	2017			1858	1208			1858	1208	
15	Midmill, Kintore	Supermarket	2017	1255	753	139	84			1394	836	
15	Forest Road, Kintore	3 units Class 1	2017	224	146	416	270			640	416	
16	Harlaw Road, Inverurie	Proposed superstore	2017	4200	2520	1500	900	300	180	6000	3600	
16	Harlaw Road, Inverurie (Aldi)	Proposed foodstore	2017	1254	900	313	225			1567	1125	
18	Westhill Centre	5 retail units (phase 1 of expansion)	2017	800	520	400	260			1200	780	
19	Deeside Nurseries, Drumoak	Extension to Garden Centre	2017					2812	2342	2812	2342	
Total												
Aberdeen City					10197	6195	7508	5109	3918	2839	21622	14141
Aberdeenshire					18766	11233	10110	6483	9862	7413	38739	25129
Total					28964	17428	17617	11593	13782	10253	60361	39270

Network of Centres

Introduction

- 4.46 Scottish Planning Policy requires the identification of a network of centres within a planning authority area. The role of individual centres within the network should be identified.
- 4.47 SPP requires that town centres should be the focus of a mix of uses – and the consultation draft SPP also identifies a range of additional requirements for locations to be identified as town centres including: a high level of accessibility; locations which have a quality of character and identity, wider social and economic activity, integration with residential areas, and environmental quality.
- 4.48 In the absence of clear guidance from SPP the following has been taken into account (from the 2009 version of PPS4 for England) for the identification of district and local centres:

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

- 4.49 The terms “district” and “local” centre are regarded as generic and terms can vary (e.g. neighbourhood or village centres in place of “local centre”). There are also a range of other types of retail location that should be considered in terms of their role within the retail network. These include: purpose built retail parks; freestanding major stores (including supermarkets/stores, retail warehouses, garden centres etc); agglomerations of large retail units in a locality; individual local shops; small parades of shops; specialist tourist/leisure shops associated with particular attractions; shops at transport hubs and so on. Not all of these are found within the study area.

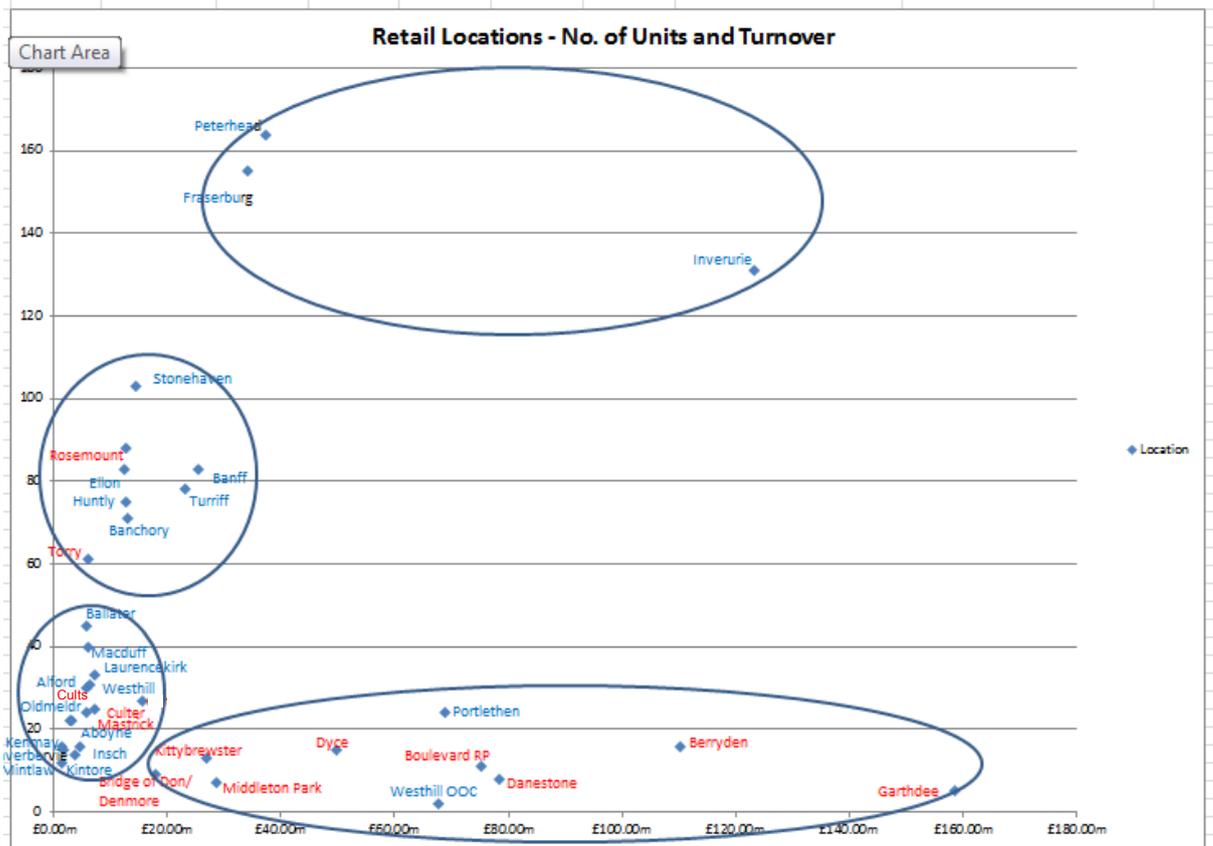
Characteristics of Existing Retail Locations in Study Area

- 4.50 There are a number of characteristics of retail locations that will assist in determining the function of the centre and, from this, identification of its classification and role within the retail network. These include:
- The number, floorspace and turnover of retail units.
 - The range of the retail goods offer – by types of shops and ranges of goods within shops within the location.
 - The extent of retail services.
 - The extent of non-retail services and facilities including both public services and facilities and also other commercial services and facilities.

4.51 These factors have been summarised in Table 4.2. From a retail planning perspective (as distinct from town centre planning) the extent of the retail offer as expressed in terms of both numbers of units and turnover is particularly useful and Figure 4.12 provides an illustration of the relationship between size of centre (numbers of units) and turnover for retail locations within the study area. The City Centre is excluded from this Figure. The first part shows the direct relationship indicating well the substantial variation in turnover between centres whereas the second part uses a logarithmic scale for turnover. The second part makes it easier to identify centres with more similar characteristics but both figures indicate broad groupings of locations based on numbers of units and turnover. The categories of locations are:

1. Large town centres with high turnover and wide range of retail offer. This is limited to Inverurie, Peterhead and Fraserburgh. Note that the turnover of Inverurie is considerably greater than the other two.
2. Medium sized town centres with a good range of shops but more limited turnover. Note that Torry, although within this group, has significantly lower retail offer and turnover.
3. Small centres comprising either larger villages' centres or traditional local centres in Aberdeen. All are dominated by smaller retail units.
4. Retail locations mostly within Aberdeen City characterised by a small number of retail units but with very wide variation in turnover but all with considerably higher turnover than category 3 above. This group includes both retail parks, agglomerations of large retail units and centres dominated by large supermarkets and superstores.

Figure 4.12: Relationship between Turnover and Retail Units



Proposed Network of Centres

4.52 Table 4.13 sets out the proposed retail network for the study area together with a summary of the function and role of each category.

Table 4.13: Proposed Retail Network

Category of Centre	Function/Role of Centre	Locations
<i>Regional Centre</i>	<i>Principal retail location for the north east of Scotland. Provides very wide range of retail, retail service and non-retail public and commercial services and facilities. Provides a focus for the city- and region-wide community and as a focus for transport.</i>	<i>Aberdeen City Centre</i>
<i>Town Centres</i>	<i>Provide a wide range of retail, retail service and non-retail public and commercial services and facilities. Provide a focus for the local community (town and immediate rural hinterland) and for local transport networks.</i>	<i>Aberdeenshire: Banchory; Banff; Ellon; Fraserburgh; Huntly; Inverurie; Peterhead; Stonehaven; Turriff; Westhill Aberdeen City: Rosemount; Torry</i>
<i>District Centres</i>	<i>Provide a range of retail and non-retail services and facilities meeting a significant proportion of shopping requirements for the surrounding local communities located primarily in suburban locations (City of Aberdeen). Superstore-based District Centres have more limited non-retail offer.</i>	<i>Aberdeenshire: Portlethen Aberdeen City: Upper Berryden; Danestone; Dyce; Rousay Drive; Middleton Park</i>
<i>Local and Village Centres</i>	<i>Provide a limited range of retail facilities and other services/facilities – primarily meeting some of the day-to-day needs of the local community.</i>	<i>Aberdeenshire: Aboyne; Alford; Ballater; Inch; Inverbervie; Kenmay; Kintore; Laurencekirk; Macduff; Mintlaw; Oldmeldrum Aberdeen City: Cults; Culter; Mastrick</i>
<i>Neighbourhood Centres</i>	<i>Small groups of local shops/parades – primarily convenience and local retail services.</i>	<i>Numerous</i>
<i>Other Commercial Locations:</i> - <i>Retail Parks</i> - <i>Others</i>	<i>Retail developments (either purpose built or well-defined groups of separate units) that serve one or more specific retail market sectors with relative wide catchment areas.</i>	<i>Aberdeenshire: Fraserburgh (Maconachie Road); Portlethen; Westhill (Endeavour Drive) Aberdeen City: Lower Berryden; Boulevard RP; Garthdee; Kittybrewster RP</i>

5 Retail Deficiencies and Floorspace Strategy

Approach to Identifying Retail Deficiencies

5.1 The SRM allows analysis to be undertaken to identify potential existing and future retail deficiencies. This includes the following:

- Comparing available expenditure within defined zones with both the forecast actual turnover and notional average turnover of floorspace within the defined Zone.
- Undertaking a similar analysis but for parts of Zones e.g. associated with new major housing allocations/settlements and the potential new floorspace that would address the available expenditure generated within the new housing areas.
- Comparison of forecast “actual” turnover with notional average turnover to ascertain the extent to which existing/committed floorspace would be trading above (or below) notional average levels.

Retail Deficiencies: Convenience Floorspace

5.2 The distribution of expenditure flows identified in the strategic model confirms that most convenience goods are purchased locally. This supports the analysis of quantitative retail deficiencies at a zonal level. The model also shows that most retail locations with significant convenience floorspace draw trade from more than one zone – in certain cases (e.g. Inverurie Tesco, or Garthdee superstores) the primary and secondary catchments are quite extensive. Furthermore catchments of competing retail locations will overlap – this occurs in both rural areas (e.g. Zone 12 with trade to each of Ellon, Peterhead and Fraserburgh) and within the City where there is relatively easy access to a number of superstores. Therefore the analysis of retail deficiencies for convenience goods includes the following:

- Consideration of available expenditure compared to notional average turnover and also actual forecast turnover.
- Examination of the existing catchment areas served by retail locations and the balance between demand and supply in the whole of these catchments.
- Consideration of the potential convenience floorspace that could be supported by major new housing allocations.

Analysis by Zones

5.3 The most straightforward guide for convenience floorspace is the comparison of available expenditure with notional average turnover. This is a conventional retail capacity approach. This identifies⁵ that, for the whole of the study area (all 33 zones) the notional average turnover for all convenience floorspace exceeds the available expenditure for all years i.e. this would suggest that, in overall terms, there is already an over-supply

⁵ The detailed tables for this analysis and for other quantitative retail deficiency analysis are not reproduced in this report but were provided for Working Papers for the study.

of convenience floorspace. This is greatest in 2017 when a number of new supermarkets and superstores are assumed to be implemented and gradually reduces to 2027.

5.4 However this masks considerable variation between different parts of the study area. For example in Aberdeenshire Zones 16 (Inverurie) and 18 (Westhill) and in the City Zones 29S (Garthdee) and 30 (City Centre) convenience turnover considerably exceeds available expenditure generated within the respective zones. In contrast the following zones show a quantitative retail deficiency:

- Rural areas: 12 (Mintlaw), 14 (Newburgh), 15 (Kintore); 20W (Strachan); 22 (Laurencekirk)
- Zone 20E – Chapelton of Elsick – particularly from 2017 onwards
- Towns: 21 (Stonehaven)
- City: 26 (Old Aberdeen); 28 (Mastrick); and 29N (west Aberdeen/Countesswells).

Analysis by Retail Locations

Aberdeenshire

5.5 Each of the zones identified above is located within the catchment area of existing centres. This is particularly the case for the rural zones. Therefore it is appropriate to consider whether the catchment areas of existing retail locations have identifiable quantitative retail deficiencies. In many of the Shire towns convenience floorspace is provided both within the town centres and in out-of-centre locations and the catchment areas served by both are generally comparable. Therefore this analysis considers the catchment areas of whole towns rather than town centres alone.

5.6 Table 5.1 identifies the principal settlements, the primary and secondary catchment areas (PCA and SCA respectively) and the difference between available expenditure and notional average turnover for these catchment areas. Two calculations are presented – the first is a direct sum of the PCA and SCA and the second, recognising that zones may be in more than one SCA, is a sum of the PCA plus half the SCA expenditure/turnover.

Table 5.1: Convenience Quantitative Deficiency Analysis – Aberdeenshire

Figures in £m 2011 prices

	PCA	SCA	PCA + SCA				PCA + 0.5*SCA			
			2013	2017	2022	2027	2013	2017	2022	2027
Huntly	4+5	6	-£31.22	-£48.26	-£46.83	-£44.45	-£28.86	-£36.78	-£36.05	-£34.19
Banff	7		£3.61	-£12.75	-£11.71	-£10.13	£3.61	-£12.75	-£11.71	-£10.13
Fraserburgh	10	12	£5.35	-£14.38	-£9.73	-£5.50	-£0.89	-£22.00	-£18.59	-£15.11
Peterhead	11	10,12	-£14.01	-£41.38	-£33.96	-£26.74	-£16.68	-£34.19	-£29.09	-£23.99
Ellon	13	10,11,14	£5.32	£2.59	£11.65	£19.53	£0.33	-£0.04	£4.94	£9.80
Inverurie	15,16	9	£1.73	-£40.54	-£37.73	-£33.06	-£2.76	-£44.74	-£41.92	-£37.45
Westhill	18	17,19	-£34.08	-£37.48	-£35.45	-£31.80	-£34.66	-£37.91	-£36.78	-£34.33
Banchory	19	1+3,17,20W	£19.51	£19.04	£21.83	£25.65	£4.07	£4.01	£6.34	£9.14
Portlethen	21,31	20E,32	-£7.53	-£35.03	-£25.09	-£18.83	-£11.38	-£25.75	-£20.61	-£16.53
Stonehaven	21	20W+22	£39.30	£41.94	£45.01	£48.53	£23.79	£25.10	£26.84	£29.12

5.7 The Table shows that there is potential for additional convenience floorspace in each of Ellon, Banchory and Stonehaven:

- Ellon's secondary catchment overlaps with each of Peterhead, Fraserburgh and Inverurie therefore limited weight should be given to the figures that give full weight to the SCA. Even if one benefits Ellon with expenditure from half of the SCA (which is a generous assumption) the retail potential is not manifest until 2022 and the scale of opportunity is limited - £11.26m turnover would be equivalent to a supermarket of about 2250 sq m GFA. This does not take into account current proposals for an Aldi supermarket in Ellon town centre – if implemented this would reduce the retail potential for all years by approximately £3.5m.
- Banchory's SCA is very extensive and overlaps with Westhill, Garthdee and Stonehaven/Portlethen. Therefore, as with Ellon, most weight should be given the second part of the table. As with Ellon the retail opportunity is limited and only available to any significant degree from 2022 onwards.
- Stonehaven's catchment is well defined and overlaps in part with Portlethen – although Portlethen has benefitted from lack of superstore competition to the south. Here there is a clear potential for a new large supermarket/small superstore to serve Stonehaven and nearby rural areas. Stonehaven is also located relatively close to Elsick and the potential for Stonehaven should also have regard to the scale of potential demand for convenience floorspace and the scale of provision proposed in Elsick's town centre.

Chapelton of Elsick

5.8 Table 5.1 excludes the potential for additional retail floorspace associated with the proposed new town of Chapelton of Elsick (located in Zone 20E). It is appropriate to consider this settlement in isolation as well as the relationship between the new town and existing centres. The total allocation of units identified in the Masterplan is over 4000 units implying a population probably in the region of 9000-10000. It is difficult to identify the rate of development and occupation of houses in the new settlement – the draft 2013 Housing

Audit identifies a build rate of 200 units per annum and the Phase 1 Masterplan for the settlement identifies a total of 1744 dwellings constructed up to 2023. These figures imply a population of approximately 1800 by 2017 and 3900 by 2022. It is not known when the whole development is anticipated to be completed.

5.9 Assuming this rate of development is achieved the convenience expenditure (net of SFT) associated with this population would be:

- 2017: £3.8m – equivalent to a supermarket with gross floor area of approx. 750 sq m.
- 2022: £8.5m – equivalent to a supermarket of gross floor area of approx. 1700 sq m.
- Completion: £20.3m – equivalent to a supermarket of gross floor area of approx. 4100 sq m.

5.10 If one assumes that a proportion of expenditure would be addressed through local/small shops and that there would also be a limited amount of net leakage from the settlement (reflecting the presence of large superstores in Portlethen and Garthdee) then the floorspace potential would be less than these figures.

5.11 Although the above figures demonstrate growth in expenditure over the study period it is not practical to plan on the basis of a gradual growth in the floor area of the principal retail store serving the town. It is appropriate to consider the market potential based on the completed development of the settlement – i.e. a maximum gross floor area of approximately 4100 sq m GFA less an allowance for small shops etc. In conclusion the potential for Elsick would be the development of a store in the region of 3750 sq m GFA, plus local (small) convenience shops.

5.12 Elsick is located close to Newtonhill and new foodstore serving Elsick would also be able to serve the existing community of Newtonhill for main-food shopping requirements. Furthermore Elsick is also close to Stonehaven and Portlethen and the identification of retail potential in this area would need to consider the ease of access to convenience shopping requirements in each of these communities.

Aberdeen City

5.13 Catchments in Aberdeen City are not well defined reflecting the relatively easy access to a range of major stores from all parts of the City. It is therefore appropriate to consider the balance between supply and demand within the model zones within the city. This analysis identifies the following:

- Zone 24S (Bucksburn). There is a clear quantitative deficiency from 2017 onwards. This is in the range of £20m increasing to £29m turnover in 2027. The principal driver for this is the additional residential development proposed for Newhills/Dyce Drive.
- Zone 26 (Hayton, Old Aberdeen). There is a significant shortfall between existing retail floorspace and available expenditure within this Zone. This is in the range of £60-£66m. However although the retail floorspace within this zone is limited it is close to superstores in Berryden, Middleton Park, Danestone and King Street. If one considers these zones as a whole (that is Zones 23, 25, 26,27, 30) there is substantial excess of average turnover over available expenditure. This would imply that there is not any clear retail deficiency for convenience goods floorspace in Zone 26.

- Zone 28 (Mastrick, Northfield). As with Zone 26 regard should be had to access to stores in Zone 25 (Danestone/Middleton Park), 27 (Berryden), and 29N (west Aberdeen/Countesswells). However when this is taken into account there is a retail deficiency in the region of £35m-£60m (highest is in 2027). This reflects the scale of new housing proposed in this part of the City.
- Zone 29N (west Aberdeen/Countesswells). A convenience retail deficiency in the range of £20-25m can be identified throughout the study period. If one takes into account neighbouring Zones a similar level of deficiency is identified by 2027.

5.14 A second approach is to consider the communities created through the major new housing allocations. These are summarised in Table 5.2 below.

Table 5.2: Aberdeen City New Housing Areas

Location (Zone)	Housing Allocation	Approximate Convenience Goods Expenditure	Approx Potential Net Convenience	Potential GFA	Comment
Dubford (23)	550	£2.70m	225 sq m	425 sq m	Limited local space only
Grandholme (25)	7000	£34.40m	2850 sq m	7350 sq m	Superstore
Newhills/Dyce Drive (Bucksburn) (24S)	4440	£21.80m	1800 sq m	4000 sq m	Large Supermarket
Greenfearns (28)	1350	£6.60m	500 sq m	1100 sq m	Small-medium supermarket
Kingswells, Maidencraig + Countesswells (29N)	3920	£19.30m	1600 sq m	3500 sq m	Large Supermarket
Loirston	1500	£7.40m	600 sq m	1200 sq m	Small-medium supermarket

5.15 A supermarket or superstore is currently identified as “committed” in Souter Head Road, Cove which would address the retail potential associated within Loirston. Grandholme is a substantial allocation but the area is relatively close to existing superstores at Middleton Park and Danestone and would also be close to the “committed” superstore at Denmore Road.

5.16 Although not justified in terms of *quantitative* retail deficiencies there is a case for the provision of a medium sized supermarket to serve local needs for Grandholme that would meet day-to-day and some main food shopping requirements for these new communities. In all new communities there is clear role for new local shopping provision.

5.17 It should be noted that, notwithstanding the role of additional convenience floorspace serving new communities in Aberdeen, if one adopts an assessment based on notional average sales densities then, for the city as a whole, there remains throughout the study period an excess of existing/committed retail floorspace compared to available expenditure.

Summary – Convenience Goods

5.18 The principal retail deficiencies for convenience floorspace are identified to be:

- Limited potential for additional convenience floorspace in Ellon and Banchory only from 2022 onwards. If the Aldi is implemented in Ellon then the convenience retail potential here will be reduced.

- Potential for large supermarkets/small superstores for Stonehaven and the new settlement at Chapelton of Elsick.
- New large supermarket/superstore in Zone 24S (Bucksburn area) for 2017 onwards – primarily to serve major new housing allocations at Newhills.
- New convenience floorspace in Zone 29N. No specific location is identified and this can be met through the provision of convenience floorspace in more than one location. Qualitative deficiencies would support some of this floorspace to be located in the Countesswells development to serve local day-to-day and limited main food shopping needs.
- New supermarket to serve Grandholme. The provision of a new foodstore in this community is not justified by a *quantitative* retail deficiency but the limited level of convenience retailing within the communities (i.e. a qualitative retail deficiency) reflecting other planning considerations. The development is within relatively easy access to major superstores and therefore the opportunity is primarily for a medium sized foodstore and related floorspace to serve local day-to-day and limited main food shopping needs.

Retail Deficiencies: Comparison Floorspace

- 5.19 The structure of retail centres meeting comparison goods requirements differs significantly from convenience floorspace. For comparison goods (and especially general comparison goods) there is a strong hierarchy of centres in the north east dominated by Aberdeen City Centre and then other major locations including major retail parks and the larger town centres. Catchments for these centres overlap with each other and with those of small centres. There is not therefore a direct relationship between available expenditure within zones or communities and comparison floorspace provision.
- 5.20 Furthermore the high rate of forecast growth in expenditure, high variation in forecasts and the changing relationship between floorspace and sales densities mean that it is difficult to assume that new floorspace provision will relate directly to the forecast growth in available expenditure. These factors make forecasts for the period from 2022 particularly unreliable.

Analysis Assuming Maintenance of Existing Shopping Patterns

- 5.21 The approach adopted here has been based on the assumption that the general pattern of expenditure (with limited allowance for market concentration) is maintained with centres and retail parks continuing to retain market share in relevant zones across the study area. This is identified through the use of “actual” expenditure levels identified from the SRM which can be compared to notional “average” turnover for the centres based on existing and committed floorspace to identify whether the forecast “actual” turnover exceeds the notional average which provides an indication of the potential for additional floorspace.
- 5.22 There are two additional factors that need to be taken into account in this analysis:
- *Assumptions relating to sales densities.* There has been considerable debate in retail planning as to whether or not it should be assumed that, over time and in real terms, sales densities should increase. The previous section demonstrated that, because of the difficulties associated with the delivery of new

floorspace (related to both market and planning issues), over the past decade, new comparison floorspace provision has not matched growth in expenditure. This position is expected to continue into the future – it is difficult to imagine the identification of sufficient sites to accommodate the scale of new floorspace that would be implied by the growth in available expenditure. Therefore the analysis undertaken has been on the basis of both maintaining existing sales densities (i.e. no increase in real terms over the study period) and also increasing sales densities (at 1% increase per annum).

- *Assumptions regarding expenditure patterns.* The review of market trends has indicated that there is a strong trend towards market concentration for comparison retailing – this would favour larger centres compared to small centres. Therefore two tests are applied in the analysis – one assuming only limited market concentration in expenditure distribution and one assuming significant increases market concentration for comparison goods.

2013 – 2022 (SRM test years 2013, 2017 and 2022)

5.23 The analysis identifies limited potential for additional general comparison floorspace for the period 2013-2020:

- Inverurie: Potential for the equivalent of £3m- £9m turnover for general comparison floorspace (ca. 2500 sq m GFA subject to type of floorspace).
- Stonehaven: Potential for the equivalent of £12- £15m turnover for general comparison floorspace (ca. 6000 sq m GFA subject to type of floorspace).
- Aberdeen City Centre: enormous potential for additional floorspace ranging from £120m to £145m in 2017. This could support ca. 55,000 sq m retail floorspace depending upon assumptions. This is an enormous market potential driven by a combination of expenditure growth per capita and large population increases within the catchment area served by the city centre.

5.24 Opportunities for additional bulky goods floorspace for the period 2013-2020 are identified as follows:

- Berryden/mid Aberdeen area – opportunity equivalent to £5m-£6m by 2017. This is equivalent to approximately 3500 sq m GFA.
- Aberdeen City Centre – opportunity equivalent to £16m-£23m by 2017. Even with higher sales densities associated with city centre locations this is equivalent to ca. 8000 sq m GFA.

2022-2027(SRM test years 2022 & 2027)

5.25 For this period substantial retail opportunities for both general comparison and bulky goods floorspace are identified in many retail locations:

- For general comparison goods these are: Huntly; Fraserburgh; Peterhead; Ellon; Inverurie; Westhill; Banchory; Stonehaven; Berryden; Danestone; Dyce; Mastrick; Middleton Park; and the City Centre.
- For bulky comparison goods: Inverurie (in one test only); Berryden; Kittybrewster; and the City Centre.

5.26 However, there are enormous uncertainties and variations with long term forecasts of future available expenditure growth and therefore it is considered that it is inappropriate to quantify potential new floorspace for the period after 2022.

Aberdeen City Centre

5.27 The scale of potential floorspace for Aberdeen identified in this quantitative analysis is enormous – even by 2017 the implied figure is 60-65,000 sq m GFA. This is a result of both significant available expenditure growth⁶ and market forces favouring major centres. Over the past decade, a period which has seen more rapid growth in expenditure than is forecast for the next 10 years, the net increase in comparison floorspace in the City Centre has been approximately 37,000 sq m GFA a large proportion of which has been associated with the development of Union Square and the extension of Bon Accord. With lower growth rates forecast it is difficult to consider that this scale of new floorspace could be developed in the City Centre over this period. It is more likely that the limitations imposed by the numbers of operators interested in investing in Aberdeen (either now or in the future) and the practical difficulties associated with bringing new floorspace forward will act as a constraint to new floorspace development rather than the growth of expenditure. This has the following implications:

- The potential capacity for additional new floorspace within the City Centre will be greater than sites or premises that could be made available. Potential demand from increasing expenditure will not act as a constraint for the provision of new floorspace.
- Sales densities within units in the City Centre will increase.
- There will be increasing market pressure to identify additional *new* retail locations to address some of the demand that cannot be accommodated within the City Centre.

Comparing Available Expenditure and Average Turnover

5.28 The foregoing analysis is based on expenditure distribution associated with existing retail centres, it does not identify situations where there are deficiencies arising from a current lack of provision. If there is limited existing provision it follows that existing expenditure flows to these locations will be very low with the result that the foregoing analysis will not identify a deficiency. This has been addressed by using a second analysis comparing available expenditure and notional average turnover for comparison goods. This is similar to that used for convenience floorspace but is complicated by the diverse patterns of expenditure associated with comparison goods. Nonetheless it is a useful exercise to identify those zones in which there is a substantial difference between available expenditure and notional average turnover in zones in which there is a major urban settlement/areas. As would be expected this shows that, with the exception of the City Centre, almost all zones identify an excess of available expenditure compared to notional average turnover. Those with the highest levels of notional shortfall using this analysis are as follows:

- Zone 13 – Ellon (existing/committed floorspace accounts for an approximate average of 25% of available expenditure in Zone).

⁶It should be noted that the expenditure growth rate assumed is the *average* of Pitney Bowes and Experian forecasts and about half the rate achieved in the period 2001-2011.

- Zone 19 – Banchory (30%).
- Zone 21 – Stonehaven (30%).
- Zone 24S – Bucksburn (4%).
- Zone 28 – Mastrick/Northfield (10%).
- Zone 29N – west Aberdeen/Countesswells (20%).
- Zone 32 – Cove (10%).

5.29 This is a very simplistic analysis because it does not take into account the hierarchical nature of comparison shopping patterns. The findings imply that the most appropriate locations for additional general comparison goods floorspace would be: Ellon; Banchory; Bucksburn area; Mastrick/Northfield/Hazlehead area; and Cove area. For the Zones in Aberdeen City it should be recognised that distances between locations are limited which would imply that, to address deficiencies it would not be necessary to increase retail provision in *each* of Zones 24S, 28, 29N and 32. Instead the key conclusion from the analysis is that there is a clear deficiency in existing provision in the west of the City (Zones 24S, 28 and 29N) and in the south (Zone 32).

5.30 A similar analysis is undertaken for bulky goods floorspace. This identifies potential locations for additional bulky goods floorspace as: Zone 24S; Zone 28; Zone 29N; and Zone 32 again indicating a deficiency in the west of the City and the south.

5.31 It should be noted that notwithstanding the approaches adopted in many retail capacity studies, it is *not* possible to state what the appropriate level of expenditure retention should be in these communities/zones and therefore it is not possible to calculate the comparison floorspace “deficiency” that is identified.

Summary and Conclusions – Comparison Goods

5.32 Two approaches have been adopted for the identification of quantitative retail deficiencies for comparison goods – one assuming the maintenance of existing expenditure patterns and the second based on a simple comparison of turnover and expenditure in individual study zones. These imply that there is potential for additional comparison floorspace in each of the following:

- Inverurie
- Stonehaven
- Ellon
- Banchory
- New retail locations in west, central and south Aberdeen
- Aberdeen City Centre

- 5.33 Further comment should be made regarding these:
- 5.34 *Inverurie*. Inverurie has demonstrated strong growth and market interest as a comparison retail location. It is in a central location and its market area serves a large proportion of Aberdeenshire. For these reasons combined with the quantitative analysis there is justification for the identification of significant additional comparison floorspace in Inverurie.
- 5.35 *Stonehaven*. The immediate market area served by Stonehaven is limited but its location close to the A90 increases the potential market catchment area. However within this area the new town of Chapelton of Elsick is proposed which will have similar access to the A90. There is, therefore, the opportunity for additional comparison floorspace to be provided to form the basis of a new town centre (together with the identified convenience floorspace deficiency) in Elsick. The provision of this floorspace in Elsick town centre would provide significant additional planning benefits rather than a location at Stonehaven.
- 5.36 *Ellon*. As well as serving the local market there are opportunities for locations close to the A90 which would increase potential market interest and development viability.
- 5.37 *Banchory*. Although the quantitative analysis supports significant additional space in Banchory its catchment area is limited and it has relatively easy access to major comparison floorspace in Garthdee and elsewhere. Major new comparison floorspace is therefore less likely to be viable. There remains potential for further growth of specialised comparison retail associated with the tourist industry in the town.
- 5.38 *Aberdeen locations*. Due to overlapping catchment areas and relative ease for access between different parts of the city the analysis does not support the identification of specific locations for new retail floorspace but does indicate that there is significant potential within the city (outwith the City Centre) as a whole. There are two important qualifications for this:
- First that there is an opportunity to provide the new comparison floorspace, combined with new supermarkets, to create new district centres to serve the new communities such as Grandholme and Newhills. This could address the current lack of broad based District Centres in the City suburbs.
 - Second that the provision of large scale comparison floorspace in new areas of Aberdeen will be much easier than redevelopment of land within or on the edge of the City Centre. The development of land in the City Centre for new retail will be a protracted, complex and costly process and could be undermined by relatively easy alternatives elsewhere in the City. Therefore a balance needs to be struck between providing new comparison floorspace in new District Centres and support for the provision of new City Centre floorspace.
- 5.39 The scale of opportunity in Aberdeen City Centre from increases in available expenditure is enormous and should not be seen as providing a limitation to new retail proposals within the City Centre. It is, however, limited by the retail market – i.e. how many retailers are willing to invest in the City Centre as opposed to alternative locations.

New Retail Floorspace Scenarios

Description of Scenario Options

- 5.40 The previous section has identified existing retail deficiencies for both convenience and comparison floorspace together with other factors to identify the potential for additional retail floorspace – primarily for the period to 2022. The provision of new retail floorspace will have a range of implications for planning including: improvements to access to retail facilities; the extent to which identified deficiencies are addressed; overall economic impacts; and potential adverse retail impacts on existing centres.
- 5.41 In order to assist the identification of the preferred strategy for the provision of new retail floorspace a series of alternative development scenarios have been identified and tested using the SRM. The initial scenarios identified were:
1. Do Minimum: retail commitments only (plus St Nicholas House redevelopment).
 2. Addressing retail deficiencies (excluding Aberdeen City Centre new comparison floorspace)
 3. Addressing retail deficiencies including major City Centre development.
 4. Addressing all retail deficiencies plus additional floorspace in Aberdeenshire.
 5. Addressing all retail deficiencies plus additional floorspace in out-of-city-centre Aberdeen.
 6. Maximising development – combination of all of the above.
- 5.42 These scenario options have been reviewed and three were selected for detailed testing:
- Scenario 1: Do Minimum – this assumes only “committed” developments plus a modest amount of retail development within the proposed redevelopment of St Nicholas House in the City Centre.
 - Scenario 3: Addressing deficiencies plus City Centre development. This includes all development identified within the “Do Minimum” plus meeting all retail deficiencies identified together with 30,000 sq m GFA floorspace for comparison goods within the City Centre.
 - Scenario 5: Addressing deficiencies plus comparison floorspace development within the City Centre (i.e. Scenario 3) together with a further 30,000 sq m GFA comparison floorspace elsewhere in Aberdeen City (outwith the City Centre).
- 5.43 Table 5.3 summarises the floorspace proposals in the three scenario options.

Table 5.3: Floorspace in Retail Development Scenario Options

Scenario Option	Convenience GFA	Gen Comp GFA	Bulky Goods GFA	Total GFA
1. Do Minimum	29,305 sq m	19,115 sq m	13,780 sq m	62,200 sq m
3. Deficiencies + City Centre	DM + 15,650 sq m	DM + 54,100 sq m	DM + 25000 sq m	DM + 94,750 sq m
5. Deficiencies + City Centre + Additional Aberdeen	DM + 15,650 sq m	DM + 72,100 sq m	DM + 37,000 sq m	DM + 124,750 sq m

5.44 The Table shows that the scale of floorspace identified in the scenario options is very large. Scenario 5 totals 186,950 sq m GFA. This is a 26% increase in the total gross retail goods floorspace in the study area. Scenarios 1 and 3 represent increases of 9% and 22% respectively.

Appraisal of Scenarios

5.45 Scenarios have been assessed in terms of:

- The extent to which different scenarios address the retail deficiencies (both quantitative and qualitative).
- The overall impacts on the level of retailing within the study area which provides the basis for identifying overall net economic benefit to the study area.
- The potential adverse retail impacts on identified retail centres arising from the different scenarios.
- Other key issues relevant to the evaluation.

Addressing Deficiencies

5.46 Table 5.4 identifies the extent to which the development Scenarios address the retail deficiencies identified above.

Table 5.4: Scenarios: Addressing Deficiencies and Potential

Identified Deficiency	Scenario 1: Do Minimum	Scenario 3: Addressing Deficiencies + City Centre	Scenario 5: Aberdeen OOC Space
Convenience			
Banff	Yes	Yes	Yes
Turriff	Yes	Yes	Yes
Kintore	Yes	Yes	Yes
Cove	Yes	Yes	Yes
Stonehaven	No	Yes	Yes
Chapelton of Elsick - supermarket	No	Yes	Yes
Bucksburn Area (24S) - supermarket	No	Yes	Yes
West Aberdeen/ Countesswells (29N)	No	Yes	Yes
Grandholme (25)	No	Yes	Yes
Comparison			
Inverurie	No	Yes	Yes
Stonehaven/Elsick	No	Yes	Yes
Ellon	No	Yes	Yes
Central Aberdeen area	No	Yes	Yes
West Aberdeen	Part (Haudegain)	Yes	Yes
South Aberdeen	No	Yes	Yes
North Aberdeen	Yes (Denmore Road)	Yes	Yes
Aberdeen City Centre	No	Yes	Yes

5.47 The principal differences between the Scenarios are that Scenario 1 addresses some of the principal retail deficiencies identified but not all. In contrast both Scenarios 3 and 5 address all of the principal retail deficiencies although Scenario 5 provides greater comparison floorspace within Aberdeen.

Overall Retail Turnover within the Study Area

5.48 The additional turnover associated with new retail floorspace is derived primarily from the diversion of turnover from existing retail locations. The vast majority of this is derived from existing shops located within Aberdeen and Aberdeenshire however a limited proportion will also be derived from locations outwith the study area. This occurs either from increase inflows from residents outwith the study area (e.g. from Moray) deciding that the retail offer within the study area is more attractive and justifies additional trips or results from study area residents deciding to travel less often to larger centres (such as Glasgow) for occasional shopping trips with the result that retention of expenditure increases. Both of these effects will be more significant for comparison shopping but even with convenience shopping this can be significant in locations such as Banff with proposals for a new foodstore reducing the likelihood of travel to Buckie and Elgin for food shopping. No account has been taken of additional turnover associated with wider economic effects from increased investment in the retail sector nor of indirect or induced income effects associated with additional retail activity.

5.49 Table 5.5 identifies from the scenario tests the *total* retail turnover within the study area by retail sectors and the net change compared to the do nothing situation.

Table 5.5 Total Retail Turnover in Aberdeen City and Shire

	Scenario 1: Do Minimum £m	Scenario 3: Addressing Deficiencies + City Centre Net Additional Turnover	Scenario 5: Aberdeen OOO Net Additional Turnover
Convenience Goods Turnover			
2013	£989.09m	£0.00m	£0.00m
2017	£1,016.53m	£0.00m	£0.00m
2022	£1,049.82m	£6.40m	£6.40m
General Comparison Goods Turnover			
2013	£1,199.78m	£0.00m	£0.00m
2017	£1,249.41m	£0.00m	£0.00m
2022	£1,351.31m	£30.79m	£30.79m
Bulky Goods Turnover			
2013	£247.27m	£0.00m	£0.00m
2017	£256.10m	£0.00m	£0.00m
2022	£277.20m	£7.82m	£7.82m
Total Goods Turnover			
2013	£2,436.14m	£0.00m	£0.00m
2017	£2,522.03m	£0.00m	£0.00m
2022	£2,678.33m	£45.01m	£45.01m

5.50 Table 5.5 shows that there is a modest increase in the total retail turnover within the study area associated with Scenarios 3 and 5. There is no significant difference between Scenarios 3 and 5. In direct employment terms £45m turnover can be considered to be equivalent to approximately 450 FTE retail jobs.

Summary of Retail Impacts

5.51 Whether or not proposed retail floorspace is addressing an identified retail deficiency it will still result in the diversion of trade from existing retail centres. Therefore *all* proposals will result in retail impacts on existing retail floorspace including town centres – for example the proposed new Tesco in Banff will result in some shoppers no longer travelling to, for example, Fraserburgh, because an attractive new store is available nearer in Banff. However one can only assess whether these impacts are significant when one takes into account both the scale of trade diversion and vitality and viability of the centre. An indicative assessment of the cumulative retail impact of all the proposals contained in the scenario options has been undertaken using the SRM. Table 5.6 summarises the results of these assessments of retail impact.

Table 5.6: Summary of Retail Impacts

Location	Zone	Type	Significance of Retail Impact		
			Scenario 1	Scenario 3	Scenario 5
Banchory	19	TC	Not signif.	Not signif.	Not signif.
Banff	7	TC	Sig improvement	Sig improvement	Sig improvement
Ellon	13	TC	Not signif.	Not signif.	Not signif.
Fraserburgh	10	TC	ST adverse impact; LT not significant	Potential Signif ST and LT	Potential Signif ST and LT
Huntly	4+5	TC	Not signif.	Not signif.	Not signif.
Inverurie	16	TC	Not signif.	Not signif.	Not signif.
Peterhead	11	TC	Not signif.	Probably not signif - some uncertainty	Probably not signif - some uncertainty
Portlethen	31	RP+Local	Not signif.	Not signif.	Not signif.
Stonehaven	21	TC	Not signif.	Some ST impacts but not significant in Long Term	Some ST impacts but not significant in Long Term
Turriff	6	TC	Not signif.	Not signif.	Not signif.
Westhill	18	TC	Not signif.	Not signif.	Not signif.
City Centre	26/27/30	CC	Not signif.	Significant improvement	Significant improvement
Berryden DC & RP	27	DC/RP	Not signif.	Not signif.	Not signif.
Boulevard RP	30	RP	Not signif.	Not signif.	Not signif.
Bridge of Don/Denmore	23	Other	n/a	n/a	n/a
Cults DC	29S	DC	Not signif.	Not signif.	Not signif.
Culter DC	19	DC	Not signif.	Not signif.	Not signif.
Danestone DC	25	DC	Not signif.	Uncertainty re impacts across range of proposals in N of city	Uncertainty re impacts across range of proposals in N of city
Dyce DC	24N	DC	Not signif.	Uncertainty re impacts across range of proposals in N of city	Uncertainty re impacts across range of proposals in N of city
Garthdee RP	29S	RP	Not signif.	Not signif.	Not signif.
Kittybrewster RP	26	RP	Not signif.	Some uncertainty - prob not signif.	Some uncertainty - prob not signif.
Rousay Drive/Tesco area	29N	Other	Not signif.	Not signif.	Not signif.
Mastrick DC	28	DC	Not signif.	Not signif.	Not signif.
Middleton Park	25	DC	Not signif.	Uncertainty re impacts across range of proposals in N of city	Uncertainty re impacts across range of proposals in N of city
Rosemount TC	27	TC	Not signif.	Not signif.	Not signif.
Torry TC	30	TC	Significant Impact	Significant Impact	Significant Impact

Note: ST denotes Short-term i.e. up to 2017 and LT Long-term i.e. 2022 onwards

5.52 Table 5.6 shows that, whereas most centres would not be significantly affected in terms of vitality and viability, there are a number of cases where there is a significant degree of uncertainty. As there are no specific proposals identified for the proposals considered within Scenarios 3 and 5 it is not possible to provide full and

detailed assessment of potential impacts and these matters would only be resolved with full retail impact assessments.

5.53 Two centres, Fraserburgh town centre and Torry, have been identified to suffer long term adverse impacts on vitality and viability:

- For Torry this would occur in all three scenarios and reflects a steady decline in the centre and poor indicators of vitality and viability at the present time. The provision of improved convenience floorspace in south Aberdeen, which is likely to be relatively easily accessible to those living in Torry's catchment, is expected to further reduce retail turnover. The centre is, already, comparatively small with relatively few additional facilities and services and these question the future role of Torry as a "town" centre.
- For Fraserburgh the town centre has suffered over the past 10-15 years from the substantial growth of retailing in out of centre locations in the town. This will be exacerbated by the new Asda store opening this year. The assessment concludes that this scheme, plus various schemes in competing towns, all of which affect the wider catchment area traditionally served by Fraserburgh (this includes proposals in each of Peterhead, Ellon, Banff and Turriff), combined with the relative weakness of the centre, are expected to result in long term significant undermining of the vitality and viability of the town centre.

5.54 In the assessment of impacts on retail floorspace west and north Aberdeen it will be noted that some caution is required for interpreting impacts. The difficulty arises because the scenarios do not provide any details of the location, scale or characteristics of the proposed floorspace. Therefore it is difficult to establish the relative strength of different proposals vis-à-vis existing centres and retail parks. The issue is particularly problematic in Aberdeen because of the relatively easy access within the city to a range of different competing retail locations. The assessment of the scenarios has therefore assumed that retail impacts will be distributed evenly between competing locations. As a result of this impacts have been identified against all of the existing centres with the conclusion that, probably, the viability of all will not be seriously undermined. However, in reality there will be a strong competitive response to new proposals and some will be significantly stronger than others. In north Aberdeen it would seem unlikely that there would be six major superstores serving the existing and new residential areas but it is not possible to identify which would not be implemented (or whether any of the existing would cease trading). A similar situation arises with comparison floorspace in north and west Aberdeen.

Scale of Floorspace Proposed

5.55 It has been noted that the overall scale of proposed retail floorspace is very high and is substantially greater than the net increase in retail floorspace that has actually occurred between 2004 and 2013. This would imply that, based on experience, the scale of new floorspace proposed in Scenarios 3 and 5 is highly optimistic.

Implications of Vacant Floorspace for Scenario Options

5.56 The three scenarios reviewed above do not take into account the potential for additional retail floorspace to be accommodated within existing vacant floorspace. There are planning benefits associated with the re-use of vacant space and it is important that any preferred development option does not undermine the potential re-use of vacant retail floorspace. According to Grampian Assessor data there is currently 46,100 sq m vacant floorspace in the study area and there are indications that, in some areas, this is likely to be an under-estimate

of total vacant floorspace. Much of this space is in locations that are unlikely to be attractive to new retail investment or are unsuitable because of the size and/or configuration of the units. A proportion of the space would also be occupied by retail services and other uses rather than for retail goods floorspace. A proportion of space would also normally be expected to remain vacant as a result of occupier “churn”. Analysis of the space indicates that, assuming a sustained strong retail market that in the region of 10,000-20,000 sq m of vacant floorspace could become occupied for retail goods floorspace, half of which would be in the City Centre.

- 5.57 Given that the scale of floorspace identified in the scenarios, especially for comparison goods retailing, is less than the potential that could be implied by the growth in available expenditure, the conclusion of the analysis is that re-use of vacant floorspace is not undermined by the scale of floorspace proposed in the scenario options.

Recommended Retail Development Strategy

- 5.58 Table 5.7 provides a summary of the appraisal of the scenarios. The recommended strategy is identified to be based on Scenario 3 subject to reducing the scale of retail floorspace in order to support retail investment in the City Centre, to minimise potential adverse impacts on existing centres and to facilitate re-use of vacant floorspace. The details of this preferred retail development strategy are described in the final Section of this report.

Table 5.7: Summary of Evaluation of Development Scenario Options

Scenario	Concept	Floorspace Proposals (figures gross floor area)	Evaluation	Recommendation
1. Do Minimum	Minimising additional floorspace within study area – limited to retail commitments plus St Nicholas House proposals	<p>30k sq m convenience 19k sq m general comparison 14k sq m bulky goods 62k sq m all goods</p> <p>Locations:</p> <p>Aberdeen: Denmore Road (unrestricted class 1); Dubford (small scale class 1); Gt Northern Road (foodstore); Haudegain Triangle (retail park); Hazlehead Nurseries (comparison); Souter Head Road, Cove (superstore); Wellington Road (class 1)</p> <p>Aberdeenshire: Turriff (supermarket); Banff (superstore); Fraserburgh (superstore); Peterhead – Kirkburn Mills (mixed); supermarket extension; Buchan Gateway (bulky); St Peter St (mixed); Kintore (supermarket and local units); Inverurie (superstore; discount foodstore); Westhill (town centre units); Drumoak (garden centre extn).</p>	<p>Retail Benefits</p> <ul style="list-style-type: none"> Provides major foodstores in existing communities in Cove, Bridge of Don; Turriff and Banff Extends comparison offer in north west Aberdeen Improves shopping choice in Peterhead, Fraserburgh and Inverurie Improves town centre/edge of centre retail offer in Peterhead and Westhill Improves bulky goods offer in Peterhead <p>Issues, Impacts and Risks</p> <ul style="list-style-type: none"> Adverse retail impacts on Fraserburgh TC and Torry Does not expressly support new retail investment in City Centre Addresses only small number of identified retail deficiencies 	<p>Reject on the grounds that Scenario only addresses a small number of retail deficiencies and does not provide retail provision for the new residential growth areas around Aberdeen and the new settlement of Elsick.</p>
3. Addressing Deficiencies + City Centre	Limiting additional floorspace to retail commitments (Scenario 1) plus addressing all identified retail deficiencies.	<p>Additional (to Scenario 1): 16k sq m convenience 54k sq m general comparison 25k sq m bulky goods 95k sq m all goods</p> <p>Locations:</p> <p>Aberdeen: City Centre (major development); Bucksburn/Newhills/west city (district centre – convenience and mixed comparison); Grandholme (district centre – convenience and mixed comparison); West Aberdeen – Countesswells Zone 29N; central /Berryden area (bulky goods); south Aberdeen (mixed comparison)</p> <p>Aberdeenshire: Ellon (mixed comparison); Inverurie (mixed comparison); Stonehaven (supermarket); Elsick (supermarket and mixed comparison – town centre)</p>	<p>Retail Benefits</p> <ul style="list-style-type: none"> All benefits of Scenario 1 Addresses all identified retail deficiencies for existing communities: Ellon and Stonehaven Extends retail offer in areas of major residential growth: north Aberdeen; west Aberdeen; south Aberdeen; Inverurie and Elsick Supports significant retail growth of the City Centre reinforcing its role as Regional Centre Supports creation of new district centres in Aberdeen and Elsick town centre with balanced floorspace (i.e. both convenience and comparison) <p>Issues, Impacts and Risks</p> <ul style="list-style-type: none"> Adverse retail impacts on Fraserburgh TC and Torry Possible adverse impacts on Peterhead TC and existing District Centres in north Aberdeen and Kittybrewster RP Total scale of floorspace is substantial (161k sq m GFA) which is close to double the amount that was provided over the period 2004-2013. Significant doubt that scale of space would be provided in market. This would undermine delivery of more difficult sites including those adjacent to or within town centres and the City Centre. 	<p>Identify as preferred strategy subject to modification reducing the scale of retail floorspace in order to reduce impacts on existing centres and support City Centre investment.</p>

Table 5.7: Summary of Evaluation of Development Scenario Options

Scenario	Concept	Floorspace Proposals <i>(figures gross floor area)</i>	Evaluation	Recommendation
5. <i>High Comparison Floorspace in Aberdeen</i>	<p><i>Facilitating high retail growth for comparison goods in Aberdeen but recognising City Centre constraints.</i></p> <p><i>Provision of all retail floorspace in Scenario 3 plus an additional 30k sq m comparison floorspace in Aberdeen outwith the City Centre.</i></p>	<p><i>Additional to Scenario 3: 18k sq m general comparison 12k sq m bulky goods 30k sq m all goods</i></p> <p><i>Aberdeen: unspecified locations distributed to west, south and north Aberdeen (all outwith City Centre)</i></p>	<p><i>Retail Benefits</i></p> <ul style="list-style-type: none"> • <i>All benefits of Scenarios 1 and 3</i> • <i>Supports strong growth of comparison retail in Aberdeen reflecting forecast growth in expenditure</i> <p><i>Issues, Impacts and Risks</i></p> <ul style="list-style-type: none"> • <i>Adverse retail impacts on Fraserburgh TC and Torry</i> • <i>Possible adverse impacts on Peterhead TC and existing District Centres in north Aberdeen and Kittybrewster RP</i> • <i>Total scale of floorspace is substantial (191k sq m GFA) which is more than double the amount that was provided over the period 2004-2013. Significant doubt that scale of space would be provided in market. This would undermine delivery of more difficult sites including those adjacent to or within town centres and the City Centre.</i> • <i>Adverse impacts and undermining of town/city centre investment will be greater than in Scenario 3.</i> 	<p><i>Reject on grounds of potential adverse impacts and potential undermining of City Centre retail investment.</i></p>

6 Recommended Retail Strategy

Introduction

6.1 The recommended Retail Strategy comprises the following:

- Locations to plan for the provision of new retail floorspace. This includes: identifying existing and future retail deficiencies; supporting areas of growth; and supporting the network of existing retail centres.
- Planning for the protection and growth of City Centre retail. This includes: the overall structure of the City Centre (prime retail and peripheral areas, the role of the west end of Unions Street and northern areas including George Street and King Street); retail planning policies; and the identification of potential retail sites.
- Planning for the protection of and growth of existing retail centres – particularly town and district centres. This also includes the need to manage change in weaker centres including the mitigation of adverse retail impacts.
- Special provisions for particular retail sectors.
- Retail planning policies.
- Other issues including town centre health checks and monitoring.

6.2 This recommended strategy focuses on retail planning matters rather than broader issues associated with town centres. In limited cases (for example with the encouragement of retail service uses in limited situations) it does include reference to non-retail planning matters where these are directly relevant to the future of retail goods floorspace. In certain instances (notably Fraserburgh and Torry) it is evident that the future retail role of centres will be under pressure as a result of both direct retail impacts from new retail floorspace elsewhere combining with changes resulting from broader structural changes in retailing. In these situations there will be a need for a comprehensive review of the future role of these centres linking retail with the full range of other town centre activities. This wider review is not addressed in this report which is confined to retail planning issues.

Context

Scottish Planning Policy

6.3 Scottish Planning Policy provides a statement of Scottish Government policy on land use planning. It provides an important context for the formulation of development plans and is an important material consideration in the determination of planning applications. A consultation draft SPP was published in 2013 but, although in places it expresses policy in different ways, the overall retail planning policy framework remains largely unaltered in the consultation draft. It should be noted that other more general requirements for policies contained in the SPP/Cons Draft SPP are also relevant, for example minimising the need to travel, support for economic growth and requirements for town centres strategies.

6.4 From SPP the principal requirements for the recommended Retail Strategy are:

- Identification of the retail network including the role of individual centres.
- Identification of deficiencies and gaps in retail provision – both existing deficiencies and those anticipated to arise as a result of proposed new residential development. This assessment should expressly consider accessibility of communities to retail provision.
- For planning policies to: i) encourage diversity of use within town centres; ii) provide for the sequential approach; iii) take into account retail impact of development proposals – both individually and cumulatively; iv) ensure that new retail development is easily accessible by a choice of transport modes.
- Undertake town centre health checks and monitoring.

6.5 Other requirements are the identification of sites/locations for new retail development and the preparation of town centre strategies. With the exception of reviewing sites for new retail development within the City Centre these aspects are not addressed in this strategy.

Retail Trends

6.6 Future trends for retail provision and the implications for the study area were summarised in Section 3. In summary the key trends and issues for retailing were identified to be as follows:

- Rates of growth for retail expenditure are forecast to be lower than experienced in the period up to 2008 per capita. However real growth is forecast even after account is taken of the growth of the internet but there is considerable variation between forecasting organisations.
- Reduced growth rates reflect increasing competition to retail for expenditure.
- Increasing value is being placed on time – this supports the role of convenience-formats – especially for convenience goods but also in selected other sectors.
- The retail business environment will remain highly competitive.
- For many retailers there will continue to be retrenchment from smaller retail centres but retaining market presence in larger retail centres.
- Successful retail businesses will pursue a variety of retail channels – combining retail space in shops with internet and similar channels.
- There will continue to be market concentration – in larger but fewer businesses, larger retail centres, and in larger units.

6.7 Many of the above trends will be in conflict – for example increased demand for convenient locations will favour smaller more local retail units whereas market concentration will tend to result in larger more

centralised retail floorspace. This may be resolved in different ways between different retail sectors – for example for convenience goods there is increased market concentration in fewer businesses but, at the same time, successful businesses have provided increased numbers of smaller shops.

6.8 The specific implications for retailing in the north east of Scotland are:

- Decline in the role of smaller more generalist retailers. This is likely to become particularly evident in smaller-medium sized town centres.
- There will be increasing demand for space for retail services (notably food and drink/entertainment) and convenience goods but reduced demand for comparison goods shops in small-medium centres.
- Major centres and other centres that are highly accessible will attract investment. More peripheral centres and/or those with more difficult access/smaller catchments will suffer relative decline.
- Overall demand for retail goods will, nonetheless, be strong over the next 10-15 years. This reflects both expenditure growth per capita and significant population growth.
- Smaller centres have the potential to grow if they are able to provide one or more of the following:
 - *a clear and distinctive role (e.g. tourism, sports related or specialist function – often associated with a very high quality environment);*
 - *benefit from major footfall associated with major retail (or other use generating high footfall) unit such as supermarket located within or adjacent to the town centre or district centre; or*
 - *benefit from strong market growth in the local catchment area.*
- Local centres and dispersed rural floorspace are expected to suffer relative and absolute decline except for individual units which meet growing or specialised market needs (e.g. leisure/tourism, garden centres etc).

Implications for Strategy

6.9 The overall implications for the retail strategy are that some retail locations will experience growth, reflecting both local population and expenditure growth whereas others will suffer relative and, in certain situations, absolute decline. The major locations for growth will be:

- Aberdeen City Centre
- Inverurie (town centre and, potentially, out of centre)
- Areas with major new urban expansion – notably Aberdeen suburbs and the principal settlements in the growth corridors in Aberdeenshire.

- 6.10 Within smaller centres, and secondary locations within the largest centres, there will be pressure for increasing retail service space at the cost of retail goods space. There will, in effect, be a shift from secondary retail locations to prime locations. The primary shift will be with national and regional multiples – retrenchment from smaller centres may create local market opportunities for smaller/independent retailers.
- 6.11 The changing location strategies for retailers will be likely to result in higher sales densities from retail floorspace. This means that growth in available expenditure will result in slower growth for new retail floorspace.

Issues to be addressed in the Retail Strategy

- 6.12 The key issues to be addressed in the recommended Retail Strategy are identified in the following box. These have been identified taking into account the context of each of: the anticipated population and expenditure growth within the study area; changes in the structure of retailing and future changes in the industry; and the policy framework provided through Scottish Planning Policy.

Key Issues to be addressed through the Retail Strategy

1. **The protection and enhancement of city, town and district centres.** *This reflects the importance of these centres providing important services and facilities to the wider community consistent with a “town centres first” policy approach. In addition the importance of protecting, where possible, local shopping provision in the city, towns and in rural areas to support local access to shopping facilities. This will support social inclusion and the minimisation of travel demand and reducing overall carbon emissions.*
2. **Encouraging new investment in retail** *in both existing retail centres (including both new floorspace and the re-use of existing space, including vacant space) and in new centres which serve new residential areas proposed within the city and shire towns and in the proposed new town of Elsick.*
3. **To ensure that all new retail developments contribute towards reducing the need to travel and encourage people to walk, cycle or use public transport by making these attractive choices.**
4. **Addressing identified existing retail deficiencies** *(qualitative and quantitative).*
5. **Addressing the retail needs of new expansion areas** *in both the city of Aberdeen and in the growth areas of Aberdeenshire.*
6. **Facilitating and supporting the growth of retail within Aberdeen City Centre** *to maintain and strengthen the vitality and viability of the City Centre and to maintain the City Centre as the principal retail location serving the north east of Scotland. The primary focus of the City Centre will be for comparison goods retailing. However it is recognised that the delivery of new sites within the City Centre is a difficult and protracted process reflecting a range of development constraints including complex land ownership. Therefore, in order to provide the maximum opportunity for City Centre development to proceed, some restraint is proposed for out-of-centre retail proposals elsewhere in the City and Shire.*
7. **Identifying general policy principles** *to be applied for all new retail development consistent with Scottish Planning Policy – notably in terms of protecting the vitality and viability of centres and the application of the sequential approach.*
8. **Identifying particular issues** *anticipated to arise with specific retail sectors and different types of retail proposals.*

Network of Centres

- 6.13 SPP requires the identification of a network of centres within a planning authority area. If appropriate this can include the concept of a retail hierarchy. The role of individual centres within the network should be identified. The existing retail centres and their function was reviewed in Section 4 and the network was identified in Table 4.14. This network is proposed to form an important component of the recommended Retail Strategy – this is therefore reproduced as Table 6.1 which includes the implications of the Strategy for the centres.

Planning for New Retail Floorspace

- 6.14 The analysis for identifying retail deficiencies and options for the provision of new retail floorspace were considered in Section 5 of this Report. As a result of this the recommended development strategy for new retail floorspace is set out in Table 6.2.

Table 6.1: Proposed Retail Network

Category of Centre	Function/Role of Centre	Locations	Implications for Strategy
<i>Regional Centre</i>	<i>Principal retail location for the north east Scotland particularly for general comparison goods retail.</i> <i>Provides very wide range of retail, retail service and non-retail public and commercial services and facilities.</i> <i>Provides a focus for the city- and region-wide community and as a focus for transport.</i>	<i>Aberdeen City Centre</i>	<i>Preferred location for all new retail development serving city and regional market.</i> <i>Promotion of new retail development sites</i> <i>Protection against potential adverse retail impact.</i>
<i>Town Centres</i>	<i>Provide a wide range of retail, retail service and non-retail public and commercial services and facilities.</i> <i>Provide a focus for the local community (town and immediate rural hinterland) and for local transport networks.</i>	<i>Aberdeenshire: Banchory; Banff; Ellon; Fraserburgh; Huntly; Inverurie; Peterhead; Stonehaven; Turriff; Westhill</i> <i>Aberdeen City: Rosemount; Torry</i>	<i>Preferred location for new retail development serving towns/districts.</i> <i>Promotion of new retail development sites (see below)</i> <i>Promotion of new mixed use/mixed retail District Centres in new expansion areas (Aberdeen) and new town centre (Elsick).</i>
<i>District Centre</i>	<i>Provide a range of retail and non-retail services and facilities meeting a significant proportion of shopping requirements for the surrounding local communities located primarily in suburban locations (City of Aberdeen) or smaller rural towns (Aberdeenshire). Superstore-based District Centres have more limited non-retail offer.</i>	<i>Aberdeenshire: Portlethen</i> <i>Aberdeen City: Upper Berryden; Danestone; Dyce; Rousay Drive; Middleton Park</i>	<i>Protection against potential adverse retail impact.</i>
<i>Local and Village Centres</i>	<i>Provide a limited range of retail facilities and other services/facilities – primarily meeting some of the day-to-day needs of the local community.</i>	<i>Aberdeenshire: Aboyne; Alford; Ballater; Insch; Inverbervie; Kenmay; Kintore; Laurencekirk; Macduff; Mintlaw; Oldmeldrum</i> <i>Aberdeen City: Cults; Culter; Mastrick</i>	<i>Protection against adverse retail impact (in recognition of significant facilities serving local communities).</i>
<i>Neighbourhood Centres</i>	<i>Small groups of local shops/parades – primarily convenience and local retail services.</i>	<i>Numerous</i>	
<i>Other Commercial Locations:</i> - <i>Retail Parks</i> - <i>Others</i>	<i>Retail developments (either purpose built or well-defined groups of separate units) that serve one or more specific retail market sectors with relative wide catchment areas.</i>	<i>Aberdeenshire: Fraserburgh (Maconachie Road); Portlethen; Westhill (Endeavour Drive)</i> <i>Aberdeen City: :Lower Berryden; Boulevard RP; Garthdee; Kittybrewster RP</i>	

Table 6.2: Proposed Development Strategy for Retail Floorspace

Zone	Location	Proposed Development	Trading by	Floorspace Type			Approx. Total Area (Sq M)		Status	Role of Proposal
				Conv	GC	BG	GFA	NFA		
1. Retail Commitments Aberdeen City										
23	Site 4 Denmore Road	Unrestricted Class 1	2015-20	✓	✓	✓	7200	4300	PP granted	Superstore and comparison floorspace for Dubford/ Denmore area
23	Dubford	Class 1	2015-20	✓	✓	✗	500	300	PP granted subject s75	Additional local retail
26	390-406 Great Northern Road	Convenience Format Foodstore	2015-20	✓	✗	✗	200	150	PP granted	Additional local retail
28	Haudegain Triangle	Retail Park	2020-25	✗	✓	✓	6500	4900	LDP allocation	Comparison floorspace for north west Aberdeen
29N	Hazlehead Nurseries	General Comp	2015-20	✗	✓	✗	500	400	PP granted	Additional local retail
32	Souter Head Road, Cove	Residential or retail opportunity	2015-20	✓	✓	✓	5800	3500	LDP allocation	Addresses supermarket deficiencies in south Aberdeen
32	Wellington Road (E)	Class 1	2015-20	✓	✓	✗	900	600	PP granted	Additional local retail
Aberdeenshire										
6	Market St, Turriff	Supermarket	2015-20	✓	✓	✗	3200	1900	PP granted	Addresses main food supermarket deficiencies in Turriff
7	Canal Park, Banff	Supermarket (Tesco)	2015-20	✓	✓	✓	4300	2600	PP granted	Addresses main food supermarket deficiencies in Banff
10	Watermill Road, Fraserburgh	Supermarket (Asda)	2015-20	✓	✓	✓	4600	2300	PP granted	Extends supermarket choice in Fraserburgh
11	Kirkburn Mills, Peterhead	Mixed class 1 retail	2015-20	✓	✓	✓	4600	3000	PP granted	Extends convenience and comparison retail offer in Peterhead
11	Asda, Peterhead	Extension	2015-20	✓	✓	✓	2000	1500	PP granted	Extends supermarket offer in Peterhead
11	Buchan Gateway, Peterhead	Bulky goods retail warehousing	2015-20	✗	✗	✓	4600	3500	PP granted	Extends bulky goods offer in Peterhead

Table 6.2: Proposed Development Strategy for Retail Floorspace (contd)

Zone	Location	Proposed Development	Trading by	Floorspace Type			Approx Total Area (Sq M)		Status	Role of Proposal
				Conv	GC	BG	GFA	NFA		
11	St Peter Street, Peterhead	3 non-food retail units	2015-20	✗	✓	✗	1900	1200	PP granted	Extension of Peterhead town centre retail offer
15	Midmill, Kintore	Supermarket	2015-20	✓	✓	✗	1400	800	PP granted	Addresses main food supermarket deficiencies in Kintore
15	Forest Road, Kintore	3 units Class 1	2015-20	✓	✓	✗	600	400	PP granted	Additional local retail
16	Harlaw Road, Inverurie	Proposed superstore	2015-20	✓	✓	✓	6000	3600	PP granted	Extends supermarket choice in Inverurie
16	Harlaw Road, Inverurie (Aldi)	Proposed foodstore	2015-20	✓	✓	✗	1600	1100	PP granted	Extends supermarket choice in Inverurie
18	Westhill Centre	5 retail units (phase 1 of expansion)	2015-20	✓	✓	✗	1200	800	PP granted	Extension of Westhill town centre retail offer
19	Deeside Nurseries, Drumoak	Extension to Garden Centre	2015-20	✗	✗	✓	2800	2300	PP granted	Increases leisure retail offer
2. Additional Proposals Aberdeen City										
30	City Centre	Major city centre retail	2020-25	✗	✓	✓	30000	19500	Proposal	Promotes long term growth of regional centre
30	City Centre	St Nicholas House	2015-2020	✓	✓	✗	1800	1200	Proposal	Enhances City Centre retail offer
24S	Newhills/Bucksburn area	Supermarket	2020-25	✓	✓	✗	4000	2400	Proposal	Addresses deficiencies – creation of new district centre combining convenience and comparison floorspace in Newhills growth area
24S	Newhills/Bucksburn area	Mixed comparison (district centre)	2020-25	✗	✓	✓	3500	2275	Proposal	
25	Grandholme	Supermarket	2020-25	✓	✓	✗	4000	2400	Proposal	Addresses deficiency – creation of new district centre combining convenience and comparison floorspace in Grandholme growth area
25	Grandholme	Mixed comparison (district centre)	2020-25	✗	✓	✓	3500	2275	Proposal	

Table 6.2: Proposed Development Strategy for Retail Floorspace (contd)

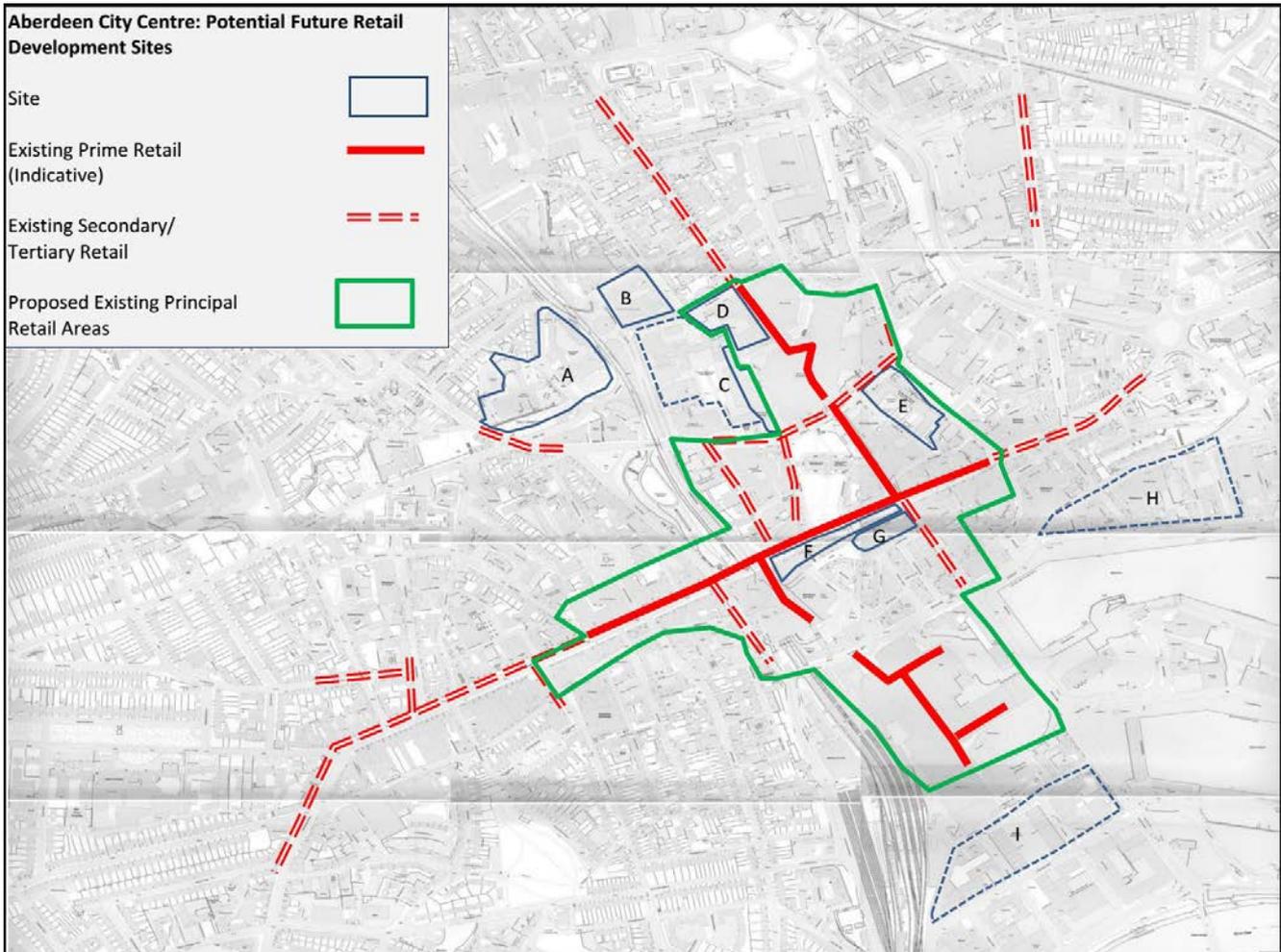
Zone	Location	Proposed Development	Trading by	Floorspace Type			Approx Total Area (Sq M)		Status	Role of Proposal
				Conv	GC	BG	GFA	NFA		
29N	West Aberdeen/ Countesswells	Supermarket/Superstore/ other convenience	2020-25	✓	✓	✗	5500	3500	Proposal	Provision of convenience floorspace to address quantitative deficiency. No specified location and may include floorspace in more than one location. A proportion of the floorspace is encouraged to be provided within Countesswells to form the basis of a new centre (see below).
29N	Countesswells	Mixed convenience and comparison	2020-25	✓	✓	✗	See "Role of Proposal"		Proposal	New centre to be provided comprising both convenience and comparison floorspace. Quantum of convenience floorspace to be from the total convenience floorspace identified for Zone 29N plus additional limited general comparison floorspace (1500 sq m GFA to be taken as indicative maximum).

Zone	Location	Proposed Development	Trading by	Floorspace Type			Approx Total Area (Sq M)		Status	Role of Proposal
				Conv	GC	BG	GFA	NFA		
Aberdeenshire										
13	Ellon	Mixed comparison	2020-25	x	✓	✓	10000	7000	Proposal	Addresses deficiency - enhances comparison goods offer in Ellon
16	Inverurie	Mixed comparison	2020-25	x	✓	✓	5000	3500	Proposal	Enhances comparison goods offer in sub-regional centre
21	Stonehaven	Supermarket	2020-25	✓	✓	x	4000	2400	Proposal	Addresses deficiency for main food shopping in Stonehaven
20E	Chapelton of Elsick	Supermarket	2020-25	✓	✓	x	4000	2400	Proposal	Addresses deficiency - creation of new town centre combining convenience and comparison floorspace in new town of Elsick
20E	Chapelton of Elsick	Mixed comparison (town centre)	2020-25	x	✓	✓	3500	2450	Proposal	
Total Aberdeen City							75400	48600		
Total Aberdeenshire							65300	42750		
Total existing commitments							60400	39150		
Total additional proposals							80300	52200		
GRAND TOTAL							140700	91350		

Aberdeen City Centre Floorspace

6.15 The recommended retail development strategy identifies 30,000 sq m GFA new retail floorspace to be located in the City Centre. A range of potential sites have been identified and reviewed to assess their potential for contributing towards this floorspace. This review is summarised in the City Centre section of Volume 2 of this report. The location of the potential sites, together with an indication of the primary and secondary retail locations within the City Centre and also the proposed City Centre Prime Retail Area is shown in Figure 6.3.

Figure 6.3: Aberdeen City Centre Potential Development Sites



6.16 The redevelopment of sites within the City Centre for new retail floorspace will be a complex and difficult process. Therefore it is recommended that a number of sites should be pursued to achieve the desired level of new retail floorspace within the City Centre comprising both major development sites and smaller sites. The recommended strategy is, therefore, as set out in the following box.

Recommended Development Strategy for City Centre Retail Floorspace

Major Retail Development Sites

- Identify land at Denburn/Woolmanhill (Site A) for major new retail development. As part of this identify mechanisms to support the integration of this site with the remainder of the City Centre.
- Monitor position and liaise with Robert Gordon College and Robert Gordon University regarding future potential of land at Schoolhill (Site C). If this site has the potential for redevelopment in the future then it should be identified as the preferred major retail development site within the City Centre.
- Review other major sites (Site H – Virginia St and Site I – Union Square South) only if no progress can be made with either Sites A or C).

Other Retail Development Sites:

- Identify the following sites for City Centre retail development:
 - Site D – George St/Crooked Lane
 - Site F – 73-149 Union Street
 - Site G – Aberdeen Market

Policy Framework

6.17 Retail planning and town centre policies (covering each of city, town and district centres) require to be provided in the Strategic and Local Development Plans. The scope of policy requirements are set out clearly in the current Scottish Planning Policy. Therefore this section provides only an overview of issues that are recommended to be addressed in policies and proposals.

Retail Policy Objectives

6.18 Planning objectives for retailing within the study area should include:

- Support for Aberdeen City Centre as the principal shopping location serving the whole of the north east of Scotland. This support should include both the enhancement of retail provision and the protection of the City Centre against adverse retail impact from retail developments outwith the City Centre.
- Improving overall access to shopping provision – particularly for day-to-day shopping requirements thereby minimising the need to travel.
- Recognition of the economic benefits of retailing.

- Addressing identified retail deficiencies through the allocation of sites for new retail development.
- Ensuring that significant new urban areas (whether new towns or extensions to existing settlements) incorporate an appropriate range of retail facilities including new town or district centres (comprising a range of types of retail unit) where appropriate.

Proposals for Retail Development

- Proposals which include retail development consistent with the proposals identified in the Development Strategy for Retail Floorspace (Table 6.2 above) should be supported. Proposals that incorporate floorspace significantly greater, or of a different character/type of floorspace, would not be consistent with the recommended strategy.
- Proposals that are not identified in the Development Strategy for Retail Floorspace, or are not consistent with it should be assessed in terms of:
 - Application of the sequential approach.
 - The impact that the proposed development would have, on its own and taking into account cumulative effects with other proposals, on the vitality and viability of relevant centres. SPP advises that retail impact assessment would normally be required for developments in excess of 2500 sq m. However, in rural areas, it would be appropriate to provide an assessment of impact for retail developments smaller than this. Retail impacts should not only consider impacts on centres identified in the Network of Centres but also impacts on local shopping facilities (e.g. village centres/isolated rural and urban shops) where these provide an important function in support local access to shopping facilities.
 - The extent to which the proposal will help meet quantitative or qualitative retail deficiencies identified in this report and which would not be addressed by other retail proposals identified in Table 6.2.

Sequential Approach

- A sequential approach should be adopted for all retail proposals with the exception of those proposals that comprise the formation of a new district or town centre (as identified in Table 6.2). The sequential approach should take into account recent court decisions about the application of the approach.
- The application of the sequential approach should also take into account the market area that would be served by the proposed development and the identified retail network:
 - For developments that would have a market area serving the whole of the study area the first location to be considered would be the City Centre (Principal Retail Area – see below), secondly the edge of City Centre, thereafter town/district centres and so on prior to the consideration of out-of-centre locations.

- For development serving parts of Aberdeen City or individual towns the first location would be the relevant Town or District Centre.

This principle reflects the approach currently adopted in the Aberdeen City LDP Supplementary Guidance 06-1.

- The current wording in the Structure Plan and Proposed SDP re “out-of-town” locations, not having defined this term, could be interpreted as permitting retail sites, consistent with the sequential approach, in locations outwith existing or planned urban areas. This wording should be reviewed and it is recommended that this is replaced with the term “out of centre” where it is confirmed that this term refers to locations within the existing or planned urban areas.

Aberdeen City Centre

- Identification of the Principal Retail Area. This should be consolidated to reflect the nature of retail uses and occupiers within the City Centre as shown in Figure 6.3. This should extend north-south between Union Square and George Street and east-west along Union Street (from Bon Accord Street to Broad Street). This Principal Retail Area is consistent with the existing distribution of retail goods shops, multiples and pedestrian flow information.
- In areas to the west of the Principal Retail Area (west end of Union Street) and north (northern part of George Street) there should be encouragement of mixed commercial and residential uses as well as retail and retail services.
- Other initiatives aimed at supporting the vitality and viability of the city centre including pedestrianisation of Union Street in the prime retail core, environmental improvements and transport infrastructure improvements should be supported.

Other Locations

- Both Torry and Fraserburgh town centres exhibit signs of weakness in terms of vitality and viability and are vulnerable to adverse retail impact. Notwithstanding the desire to encourage investment by both the private and public sectors in these centres it is appropriate to consider means for the rationalisation and consolidation of retail uses in these centres including the encouragement on non-retail commercial uses and residential development within the town centres.

Issues with Retail Sectors

6.19 The general retail planning objectives and policy framework outlined above should be applied to all retail sectors and sub-sectors. However, it is useful to provide a brief review of specific issues that apply to particular retail sub-sectors. These issues are summarised here.

Convenience: Supermarkets and Superstores

6.20 The current level of new supermarket/superstore development is significantly lower than in the period up to 2008. Most towns and communities within the study area now have supermarkets or superstores primarily aimed at meeting main food shopping needs either trading or planned. The notable exception to this is

Stonehaven. The proposed urban extensions and new settlement provide opportunities for additional new supermarket/store floorspace. The key retail planning issues to be considered when assessing these proposals include:

- The role of the supermarket/superstore in providing the anchor or core of a new town, district or retail centre in new urban communities.
- The retail impact that new supermarkets/stores will have on other centres identified in the retail network and also on local retail floorspace – this will be especially significant in rural areas where there is more limited access to food shopping facilities.
- The extent to which a new supermarket/store will reduce overall travel requirements and, consequently, carbon emissions.
- The role of comparison goods in supermarkets/superstores. In general a high proportion of comparison goods (typically over 30%) will result in higher levels of trade diversion from larger town centres. However those stores that are located within, or on the edge of existing district/town centres, or are used to form the core of a new district/town centre, can assist in extending the range of types of goods that can be purchased consistent with the objectives of the centre.

Convenience: Convenience-format Stores

6.21 Convenience-format (“C-format”) stores are those stores that provide local, top-up shopping facilities primarily for food and drink but are often combined with newsagents/tobacconists. In some cases a limited range of comparison goods may also be retailed. The key characteristic of the stores is their limited size – typically less than 300-400 sq m GFA. This limits the total range of goods that can be stocked.

6.22 C-format stores present a clear benefit in improving access to local retail and can, therefore support social-inclusion and reduce carbon emissions. However, if located outwith centres, they can be in direct competition with similar stores in defined centres and this could, potentially, affect the viability of smaller centres.

6.23 Key issues are:

- The small size of stores generally limiting potential retail impacts arising. However one should note the vulnerability of small centres (e.g. small district/town centres and local centres etc) to potential impact from this sector – especially the cumulative impact if a number of stores are developed.
- The role of these stores in supporting/improving local access to day-to-day shopping needs.
- Only in exceptional circumstances should regard be had to the proposed operator of a C-format store. If regard is had to the operator this would need to be carefully justified on planning grounds.

Convenience: Specialist

6.24 Specialist convenience shops include the traditional butcher, baker, fishmonger etc. This group has declined steadily over the past few decades having been particularly affected by supermarkets and superstores and, to a lesser extent, the resurgence of C-format stores. It is expected that this sector will continue to decline and

existing operators seeking to diversify their offer – for example Greggs, a successful national bakers chain, has recently announced that its future growth will be based on focussing on the hot/cold food takeaway business rather than traditional bakery goods.

Convenience: LADS and Freezer Centres

- 6.25 Limited Assortment Discounters (currently Aldi and Lidl) and freezer centres (notably Farmfoods and Iceland) continue to grow steadily in terms of turnover. Because of their generally limited offer and limited size of stores (compared to major supermarkets) they can provide a useful role in complementing independent shops in district and town centres. Their relatively low turnover also limits the scale of retail impacts. They have very specific business models which affect the suitability of alternative sites and premises under the sequential approach and this should be recognised in the light of recent legal decisions concerning the application of the sequential approach. Notwithstanding this the same policy principles apply to these retailers as with supermarkets and superstores.

Comparison: Retail Warehouses

- 6.26 In recent years there has been increased demand for retail warehouses retailing general comparison as well as bulky goods from retail warehouses. Extending the range of goods sold provides greater opportunities for re-letting units when they become vacant. Furthermore the recent growth of the discount sector for comparison goods has increased demand for these types of units.
- 6.27 The principles set out in the above policy framework should be applied to all retail proposals for retail warehouses including the assessment of retail impact and the application of the sequential approach. In terms of retail assessment it is important to recognise that general comparison warehouses generally have higher turnover levels than bulky goods units and will divert a higher proportion of trade from town/city centres. In terms of the sequential approach the key issue will be the market area served by the proposed development – if regional then the first preference is for a City Centre (Principal Retail Area) then edge of City Centre (PCA) location. In the absence of reasonably suitable and available sites within city, town and district centres or on the edge of them a location within, or on the edge of an existing retail park/other commercial centre is preferable to a freestanding retail warehouse which has no physical relationship to any other identified retail location.
- 6.28 The potential for retail warehouse units should be considered to be included as part of the new district/town centres identified in the Development Strategy. This will be a challenge to conventional design approaches to retail parks but the inclusion of some larger units has the potential to provide stronger new centres which are able to provide balance of uses including: supermarket, small unit shops for retail goods and services; medium and large format units for a range of comparison goods.

Comparison: Very Large Floorplate Units

- 6.29 In the comparison sector there are a limited number of operators that use very large floorplates for their stores. These include department stores (the average sizes of these are in the region of 10k to 20k sq m GFA) with John Lewis, House of Fraser, Debenhams and Selfridges being the most important retailers in this sector in Scotland. Larger still is IKEA whose store portfolio across the UK averages 25,000 sq m *net floor area* implying a gross floor area in the region of 28,000 sq m per store. The importance of these units is equally apparent in terms of turnover – the above Department stores' average turnover is in the range £10-

12m for Debenhams and House of Fraser but rises to over £75m for John Lewis and IKEA's average sales in 2011/12 were £63m per store.

6.30 It is not known if any of these operators are seeking new floorspace in the study area. IKEA recently announced plans for expansion and it is possible that this could include a store in the Aberdeen area to serve the north of Scotland market. .

6.31 The key issue for these units is their scale – both in terms of floorspace and turnover. This has significant implications for both assessing retail impact and the application of the sequential approach:

- For both department stores and IKEA a high proportion of retail impact will be on City Centre shops. It could be argued that IKEA is predominantly a bulky goods retailer and that this sector is less important in the City Centre however a substantial proportion of sales area in IKEA is devoted to a wide range of general comparison goods and a high proportion of this turnover will be diverted from the regional centre and other town centres. For developments of this size, if located outwith the city centre, it is essential that a full and detailed retail impact assessment is provided. This needs to be prepared fully in line with the good practice guidance set out in Town Centre and Retailing Methodologies research published by the Scottish Government in 2007. In terms of the impact on the City Centre particular regard should be had to the potential effects that such a proposal will have on undermining confidence in future investment in the city centre – including the ability to generate investment in significant new retail floorspace.
- The scale of these units is such that it is difficult to locate them within the existing town centres or the City Centre – unless they can be accommodated in one of the City Centre sites identified in the Development Strategy. Regard should also be had to traffic generation – IKEA in particular generates significant traffic flows and access by private car for the transport of flat-pack goods is a key requirement for the retail operation.
- In the absence of City Centre sites the sequential approach should be applied consistent with the principles outline above i.e. edge-of-city centre and so on. It is likely that there will be pressure for a location close to the AWPR. If this location is outwith the existing or planned urban area it is considered that it would fall outwith the terms of the sequential approach – para 62 of Scottish Planning Policy does not envisage retail developments in locations beyond out-of-centre locations. The issue with the terminology used in the Structure Plan and proposed SDP has been noted above in the “Sequential Approach” section.
- In addition to the above the following considerations would also be relevant from a retail planning perspective:
 - The net economic benefits associated with the proposal. A major retail proposal of regional significance would potentially draw additional trade and expenditure into the study area from other areas (notably Dundee, Moray and Highland).
 - The extent to which the proposed development would improve competition and choice within retailing and extend the type of retail offer within the study area.

- Impact on overall travel demand - with implications for carbon emissions.
- Whether a large format store can be used to link into the development of a new district/town centre in accord with the Development Strategy.

Comparison: Tourist Retail

- 6.32 Retail provision associated with a tourist attraction can provide significant economic benefits as a result of increasing tourist spend within the study area. However it should be recognised that a proportion of this spend will be diverted from other tourist related locations and, possibly, from other types of tourist spend. In addition it should be noted that a significant proportion of spend will be from day visitors originating from the north east of Scotland, in other words, careful consideration has to be given as to whether or not spend from this sector will be diverted from other retail centres or other tourist/leisure destinations within the study area. These factors therefore should be carefully assessed. As with all other types of retail development there remains the requirement for assessing retail impact on existing centres and the application of the sequential approach.
- 6.33 In the application of the sequential approach the unique characteristics of the development and its relationship to a tourist attraction are of particular importance for the proposal to be considered a genuine tourist retail facility. A tourist attraction may be incorporated into the development proposal or closely related to an existing attraction (including both specific visitor attractions such as a castle or historic garden) or an existing town centre/locality which already attracts tourists. In the absence of this linkage it is difficult to justify the proposed retail floorspace in terms of tourism benefits – i.e. a freestanding retail development simply retailing goods that could be regarded as attractive to “tourists” (or indeed anyone else) should not be considered to be justified on tourist grounds – this is simply a retail proposal that would have to fully satisfy the sequential approach (and retail impact) in the conventional manner.

Comparison: Garden Centres

- 6.34 The retail of garden and related products normally requires relatively large sites and garden centres are, therefore, typically located in the countryside or urban fringes. Often this location reflects an historic relationship with nurseries for the propagation of stock. Garden Centres are now important leisure shopping destinations and the provision of an attractive café/restaurant is often an important component of the offer.
- 6.35 Over the past decade or more there has been a steady increase in the retail of general comparison goods unrelated to the garden centre. These goods are predominantly gift- and home-related and reflect and reinforce the leisure trip to the garden centre. However the retail of these goods is in competition with the retail offer found in many town centres. Whereas the need for a large retail unit with extensive external display areas is justified for garden-related products this is not the case with the general comparison offer. Therefore not only should any proposals for garden centres and their extension be subject to the normal policy requirements including retail impact assessment and the applications of the sequential approach but consideration should also be given to the role of conditions restricting the ranges of goods that can be sold from the unit. A garden centre is, after all, primarily a retail unit and, without the use of conditions controlling the ranges of goods, there is a risk of establishing a substantial unrestricted class 1 retail unit in a countryside location.

Others: Retail Clubs and Trade Warehouses

- 6.36 Retail clubs and trade warehouses are normally considered to be outwith Class 1 of the Use Classes Order. However their importance in retail terms should not be under-estimated. There is a lot of variation between different operations and for this reason these uses cannot always be regarded as a single use type. For example Costco operates on a membership basis restricting those who can be members (although it should be recognised that the scope of potential members is very wide ranging) and requires an annual fee. Makro is, ostensibly, a trade warehouse requiring VAT registration. However Makro cards are available to employees of businesses thereby substantially increasing the numbers able to use purchase goods. Although some goods are only sold in large batches these do not put off purchase of goods for domestic use. In the case of Costco the target market is private households. In the case of Makro although some products are clearly aimed at trade/businesses others are clearly not (e.g. electronics, clothing, footwear and household goods).
- 6.37 The retail significance of these types of proposals should therefore be recognised and taken into account in the determination of applications. For example the average UK turnover of a Costco warehouse in 2011/12 was £68m (i.e. higher than IKEA) and Makro is the region of £20m per store. Although not a class 1 use the potential impacts of this type of operation should be recognised and any proposal for a comparable type of unit, from which a significant proportion of retail sales are anticipated, should be the subject of an appropriate impact assessment.

Monitoring

- 6.38 As part of the recommended Retail Strategy the following box identifies additional actions should be undertaken, or continue to be undertaken, by the planning authorities:

- All retail, and retail service planning applications, and other uses incorporating a significant amount of retail floorspace (>100 sq m) should be monitored and recorded in a database. Similar proposals involving the loss of existing retail floorspace should also be included. This will allow easy update of the retail model and to monitor change within town centres.
- Town centre health checks should continue to be undertaken.
- The SRM should be updated regularly to assess changes to the network of centres and allow early identification of changes affecting centres.

Recommended Retail Strategy – Summary for Centres

- 6.39 The recommended Retail Strategy comprises a number of distinct elements: identification of the Network of Centres; the protection of defined centres within the Network; promotion of retail investment in Centres; addressing retail deficiencies; supporting retail facilities in new urban areas; identification of new retail development within the City Centre and elsewhere; identification of key policy principles; and consideration of the particular issues for different retail sectors. These have varying effects on different settlements and centres. Table 6.4 provides a summary of the position for each of the centres identified in the Network of Centres including:

- Characteristics of retail provision – market area served and scale of retail turnover
- Summary of key retail issues and deficiencies affecting the centre.
- Existing retail commitments affecting the centre (including those proposed nearby but outwith the defined centre).
- Implications of the recommended Retail Strategy for each centre.

Table 6.4: Retail Issues and Strategy for Retail Centres

Retail Centre/ Location	Market Area Served		Summary of Provision: 2013			Turnover Growth to 2022 incl Commitments	Summary of Retail Issues/Deficiencies			Impacts arising from strategy proposals	Commitments		Strategy		
	PCA	SCA	No. (All types)	GFA Sq M Retail Goods	Turnover £m Retail Goods		Convenience	Comparison	Other		In Centre	In Wider Locality	Network	Policy	Proposed Floorspace
City Centre	26/27/30	Remainder	891	278581 Sq M	£866.16m	6%	Limited provision - only one main food store - affected by proposals in north of city	Substantial expenditure growth - need to identify locations to enable City Centre to grow	Role of West End and George Street Linkages between Union St and Union Square Pedestrianisation of Union Street	Significant growth of City Centre		City Centre	Protection and promotion of significant new retail floorspace	30,000 sq m City Centre scheme	
Banchory	19	1+3,17,20W	71	8578 Sq M	£12.89m	0%	Impacts of OOC supermarket on Town Centre Lack of mid-large format foodstores incl freezer centres, discounters etc	Role of tourism Strong growth in expenditure Lack of units suitable for multiples - mid and large size	Strong V&V. Importance of centre in Deeside and tourism related trade/opportunities	Not significant		Town Centre	Protection		
Banff	7	6	83	16005 Sq M	£25.33m	45%	New supermarket will significantly enhance Town Centre retail offer and turnover	Potential for specialist retail linked to tourism Lack of large format comparison - implying development opportunity However generally limited demand for mainstream comparison shops - due to limited market Lack of units of suitable size and format for multiples	Generally weak V&V at present Generally limited market due to competing towns. Potential role of harbour/historic character of town but generally remote from major tourist areas	Not significant	Supermarket 4292sqm	Town Centre	Protection and promotion of significant new retail floorspace		

Retail Centre/ Location	Market Area Served		Summary of Provision: 2013			Turnover Growth to 2022 incl Commitments	Summary of Retail Issues/Deficiencies			Impacts arising from strategy proposals	Commitments		Strategy		
	PCA	SCA	No. (All types)	GFA Sq M Retail Goods	Turnover £m Retail Goods		Convenience	Comparison	Other		In Centre	In Wider Locality	Network	Policy	Proposed Floorspace
Chapelton of Elsick								Design of centre should limit size of supermarket and seek to incorporate range of additional units including for comparison goods, service units and other facilities including small, medium and large format units. Phasing to link total size of centre to settlement growth	n/a			<i>New Town Centre (once implemented)</i>	Promotion of new town centre	New centre: supermarket 4000 sq m + 3500 sq m comparison (phased)	
Ellon	13	11,12,14	83	12737 Sq M	£12.43m	8%	Most key sectors provided for in TC or OOC. Role of local shopping to serve residential expansion area	Lack of units suitable for multiples - mid and large size. Potential market would support retail warehouse park including general and bulky goods	Major expansion of market as a result of population growth. Significant competition from Inverurie, Peterhead and Aberdeen Some weaknesses and low levels of local satisfaction but centre has generally strong indicators of V&V	Not significant		Town Centre	Protection and promotion of significant new retail floorspace	10,000 sq m OOC mixed comp	
Fraserburgh	10	7,11,12	155	25432 Sq M	£33.97m	-2%	Limited town centre offer - including no town centre supermarket Increased competition with new Asda supermarket in OOC location TC affected by competition as a result of improved retail offer in all competing towns esp Banff, Turriff and Peterhead	Lack of modern floorspace suited to multiples. Bulky comparison directed to Peterhead limiting opportunities in Fraserburgh	Weak V&V. Potentially significant short-term and long term adverse retail impacts results in the need to actively manage future change in the town centre.	ST adverse impacts, potential significant long term impacts	Supermarket 4610sqm	Town Centre	Protection and manage change		

Retail Centre/ Location	Market Area Served		Summary of Provision: 2013			Turnover Growth to 2022 incl Commitments	Summary of Retail Issues/Deficiencies			Impacts arising from strategy proposals	Commitments		Strategy		
	PCA	SCA	No. (All types)	GFA Sq M Retail Goods	Turnover £m Retail Goods		Convenience	Comparison	Other		In Centre	In Wider Locality	Network	Policy	Proposed Floorspace
Fraserburgh OOC - Maonachie Rd	10	7,11,12		10669 Sq M	£53.84m	23%			Comprises 4 modern units.	Not significant			Other Commercial Centre		
Huntly	4+5	2,6,7	75	12180 Sq M	£12.78m	4%	Two major supermarkets limit potential for further growth	Potential for tourism related floorspace. Existing units generally unsuited to multiples requirements	Mixed indicators of V&V but recent changes (notably increase in vacancies) suggest weakening. Significant expenditure growth but market generally limited - especially with new floorspace in Turriff, Banff and Inverurie	Not significant			Town Centre	Protection	
Inverurie	15,16	2,4+5,9,13	131	40042 Sq M	£123.21m	-14%	All principal convenience sectors provided in Inverurie. Size of market and growth will support additional provision in all main sectors. Commitments include a third superstore and second discounter in the town.	Potential for continued growth of floorspace in response to strongly growing market.	Substantial market and strong market growth. Inverurie will continue to attract market interest for new floorspace. New town centre floorspace would need to try to address structure and coherence of town centre. Strong V&V.	Not significant	Harlaw Road: superstore 6000 sq m Harlaw Road: Aldi 1567 sq m	Town Centre	Protection and promotion of significant new retail floorspace	5,000 sq mixed comparison - location to be determined - assessment assumes OOC	
Peterhead	11	10,12	164	27889 Sq M	£37.14m	2%				Some uncertainty - probably not significant adverse impact	St Peter St mixed retail: 1858sqm Asda extn: +1956 sq m	Kirk Mills mixed: 4565 sq m	Town Centre	Protection and promotion of significant new retail floorspace	
Peterhead OOC - Buchan Gateway	11	10,12				32%				Not significant	Bulky goods: 4645sqm		Other Comm Centre - once additional new floorspace implemented	Promotion of new retail investment	

Retail Centre/ Location	Market Area Served		Summary of Provision: 2013			Turnover Growth to 2022 incl Commitments	Summary of Retail Issues/Deficiencies			Impacts arising from strategy proposals	Commitments		Strategy		
	PCA	SCA	No. (All types)	GFA Sq M Retail Goods	Turnover £m Retail Goods		Convenience	Comparison	Other		In Centre	In Wider Locality	Network	Policy	Proposed Floorspace
Portlethen	31	20E, 20W, 21,22, 30, 32	24	22956 Sq M	£68.74m	10%	Lack of independents/ specialist and mid-size units (including discounters and freezer centres).	Limited provision for small/mid-sized units. Additional comparison floorspace identified for Elsick to support formation of new town centre - therefore none proposed for Portlethen.	Not identified as a town centre. Existing provision comprises: superstore plus limited retail park and, functionally separate from these, local/neighbourhood shopping facilities. Retail subject to competition and impact from new supermarkets/superstores to south (Stonehaven), west (Elsick) and north (Cove etc). Limited retail services and additional facilities.	Not significant		District Centre	Protection		
Stonehaven	21	20E, 20W, 22	103	11314 Sq M	£14.29m	15%	Lack of main food supermarket and discounter. Strong independent and convenience format.	Continued strong demand from independents and specialists - market potential from tourism and related. Lack of medium -large units attractive to multiples	Long term difficulty identify in supermarket site that links well to town centre/existing urban area. Strong V&V. Strong market growth.	Not significant		Town Centre	Protection and promotion of significant new retail floorspace (location tbc)	4000 sq m supermarket - location to be determined	
Turriff	6	7,8,9	78	14663 Sq M	£23.04m	0%	Limited market but proposals for supermarket identified as commitment. Future potential limited due to competition from nearby towns.	Limited demand due to limited catchment.		Not significant	Supermarket: 3200sqm	Town Centre	Protection		

Retail Centre/ Location	Market Area Served		Summary of Provision: 2013			Turnover Growth to 2022 incl Commitments	Summary of Retail Issues/Deficiencies			Impacts arising from strategy proposals	Commitments		Strategy		
	PCA	SCA	No. (All types)	GFA Sq M Retail Goods	Turnover £m Retail Goods		Convenience	Comparison	Other		In Centre	In Wider Locality	Network	Policy	Proposed Floorspace
Westhill	18	15,17,19, 28, 29N, 29S	27	6078 Sq M	£15.42m	14%	Range of convenience provided in town centre - main food store is located OOC.	Proposals to extend floorspace in centre. Lack of bulky goods provision. Potential market demand for future provision.	Centre is relatively small but provides a range of retail goods and services - limited non-retail services. However forms a key centre to the settlement. Need to identify sites to support on-going long term development of centre.	Not significant	TC extension: 1200 sq m	Town Centre	Protection and promotion of significant new retail floorspace		
Westhill - Endeavour Drive	18	15,17,19, 28, 29N, 29S	2	16162 Sq M	£67.68m		Tesco superstore + significance main food shopping in Costco	Range provided in Costco		Not significant		Other Commercial Centre			
Berryden	27	Extensive in region	16	38909 Sq M	£110.21m	0%	Limited provision apart from Sainsbury superstore. Lack of units to support independents.	Large format units provided. No units suitable for small independents. Limited range of retail. Strong bulky goods	Issues concern layout of centre to increase attractiveness to pedestrians and linkages between upper and lower parts. Limited opportunities for growth but possibilities for reconfiguration.	Not significant		Upper Berryden - District Centre Lower Berryden – Other Commercial Centre (Retail Park)	Protection for District Centre		
Boulevard	26,30	27,28	11	22644 Sq M	£75.09m	-4%			Conventional retail park layout anchored by major superstore	Not significant		Other Commercial Centre (Retail Park)			
Zone 29N west Aberdeen/ Countesswells							Quantitative Deficiency identified for convenience goods for whole of Zone 29N		Countesswells: Range of provision of new retail floorspace to form new centre. Convenience floorspace to be from the 5500 sq m GFA identified for whole of Zone 29N.	n/a				5500 sq m GFA supermarket/ superstore and additional convenience floorspace. Additional comparison floorspace up to 1500 sq m in Countesswells centre	

Retail Centre/ Location	Market Area Served		Summary of Provision: 2013			Turnover Growth to 2022 incl Commitments	Summary of Retail Issues/Deficiencies			Impacts arising from strategy proposals	Commitments		Strategy		
	PCA	SCA	No. (All types)	GFA Sq M Retail Goods	Turnover £m Retail Goods		Convenience	Comparison	Other		In Centre	In Wider Locality	Network	Policy	Proposed Floorspace
Cults	29S		31	4786 Sq M	£6.33m	-1%	Limited offer - local top-up shopping Access to main food shopping at Garthdee	Minimal comparison offer	Some additional facilities for local community	Not significant		Local Centre	Protection		
Culter	19		22	2227 Sq M	£2.66m	6%	Limited offer - local top-up shopping Access to main food shopping at Garthdee	Minimal comparison offer		Not significant		Local Centre	Protection		
Danestone	25,26	14,23 ,24S, 28,29 N	8	13919 Sq M	£78.25m	4%	Limited range of convenience - dominated by superstore. Will be affected by new proposals at Newhills, Grandholme and Denmore Road	Minimal comparison offer	Location is dominated by a single superstore (Tesco) with limited range of retail and non-retail services. However it is important for local community and therefore identified as District Centre.	Uncertainty re future impacts from range of new centres in north of city		District Centre	Protection		
Dyce	15,24 N	24S, 25,28	15	10268 Sq M	£49.74m	6%	Limited range of convenience - dominated by superstore. Will be affected by new proposals at Newhills and Grandholme	Minimal comparison offer	Location is dominated by a single superstore (Asda) with limited range of retail and non-retail services. However it is important for local community and therefore identified as District Centre.	Uncertainty re future impacts from range of new centres in north of city		District Centre	Protection		
Garthdee	29S, 30	19,28 ,29N, 31,32	5	34892 Sq M	£158.75m	-12%			Layout comprises series of large format units in close proximity but not as a single retail warehouse park or similar. Included because of the importance of location in retail terms.	Not significant		Other Commercial Centre			
Grandholme									Design of centre should limit size of supermarket and seek to incorporate range of additional units including for comparison goods, service units and other facilities including small, medium and large format units.	n/a		<i>New District Centre - once implemented</i>	Promotion of new district centre	New centre: supermarket 4000 sq m + 3500 sq m comparison	
Kittybrewster RP	26	25,27 ,28,2 9N,2 9S	13	17044 Sq M	£26.94m	13%	None	Conventional retail park		Not significant		Retail Park			

Retail Centre/ Location	Market Area Served		Summary of Provision: 2013			Turnover Growth to 2022 incl Commitments	Summary of Retail Issues/Deficiencies			Impacts arising from strategy proposals	Commitments		Strategy		
	PCA	SCA	No. (All types)	GFA Sq M Retail Goods	Turnover £m Retail Goods		Convenience	Comparison	Other		In Centre	In Wider Locality	Network	Policy	Proposed Floorspace
Rousay Drive (Langstracht)	29N	28, 29S	8	7044 Sq M	£43.56m		Limited range of convenience - dominated by superstore. Will be affected by new proposals at Newhills and west Aberdeen	Minimal comparison offer	Location is dominated by a single supermarket (Tesco) with limited range of retail and non-retail services. However it is important for local community and therefore identified as District Centre.			District Centre	Protection		
Mastrick DC	28	29N, 29S	24	3791 Sq M	£5.75m	6%	Range of independent convenience and convenience format No supermarkets or other large format units	Limited comparison offer	Small centre but well used by local catchment - provides a limited range of additional facilities. Despite limited size relatively strong indicators of V&V			Local Centre	Protection		
Middleton Park	25	7,23, 26	7	5787 Sq M	£28.71m	-1%	Limited range of convenience - dominated by superstore. Will be affected by new proposals at Newhills, Grandholme and Denmore Road	Minimal comparison offer	Location is dominated by a single supermarket (Asda) with limited range of retail and non-retail services. However it is important for local community and therefore identified as District Centre. Possibilities for reconfiguration with community facilities to north (medical/sport)	Uncertainty re future impacts from range of new centres in north of city	Denmore Road: superstore + RW - 7220 sq m	District Centre	Protection		
Newhills/Bucksburn									Design of centre should limit size of supermarket and seek to incorporate range of additional units including for comparison goods, service units and other facilities including small, medium and large format units.	n/a		<i>New District Centre - once implemented</i>	Promotion of new district centre	New centre: supermarket 4000 sq m + 3500 sq m comparison	

Retail Centre/ Location	Market Area Served		Summary of Provision: 2013			Turnover Growth to 2022 incl Commitments	Summary of Retail Issues/Deficiencies			Impacts arising from strategy proposals SCA	Commitments		Strategy		
	PCA	SCA	No. (All types)	GFA Sq M Retail Goods	Turnover £m Retail Goods		Convenience	Comparison	Other		In Centre	In Wider Locality	Network	Policy	Proposed Floorspace
Rosemount	27	26,28,29N,29S,30	88	8518 Sq M	£12.61m	3%	Good range of independents and convenience-format units. No large format units	Good range of independent shops - primarily small units but wide choice of types of goods on offer. No large format units available.	Provides a specialist and local shopping function. Limited opportunities to expand - primarily based on conversion of historic premises to/from retail.	Not significant			Town Centre	Protection	
Torry	30		61	5552 Sq M	£6.04m	-10%	Reasonable range of small format independents. No large format including supermarkets etc.	Independent shops providing a reasonable range of types of goods - but with minimal choice.	Weak V&V. Significant range of additional facilities and services	Significant adverse impact with all development scenarios			Town Centre	Protection	

Aberdeen City and Aberdeenshire Retail Study 2013
Final Report Volume 2:
Review of Retail Locations in Aberdeen and
Aberdeenshire

October 2013

reference:

Contact: **Keith Hargest**

Tel: **0131 443 8813**

Email: **keith.hargest@btconnect.com**

Contents

1	Introduction	1
2	Aberdeen City Centre	4
3	Aberdeenshire	34
4	Aberdeen City (excluding City Centre)	92

Ordnance Survey plans contained in this report reproduced under license 100040565

1 Introduction

- 1.1 This Volume of the Draft Final Report provides a review of retail information for each of the principal retail locations within the Study Area, which is the whole of Aberdeen City and those parts of Aberdeenshire lying outwith the Cairngorms National Park. The centres covered in this are as follows:

Aberdeen City	Aberdeenshire
Aberdeen City Centre	Banchory
Berryden	Banff
Boulevard	Ellon
Culter	Fraserburgh
Cults	Huntly
Danestone	Inverurie
Dyce	Peterhead
Garthdee	Portlethen
Kittybrewster	Stonehaven
Mastrick	Turriff
Middleton Park	Westhill
Rosemount	
Rousay Drive	
Torry	

- 1.2 There are a small number of additional locations elsewhere in the study area that have significant concentrations of retail activity. These include: Maconachie Road area, Fraserburgh; various out of centre locations, Peterhead; Endeavour Drive, Westhill; and various retail units along both Denmore Road and the Langstracht in Aberdeen. Details of the floorspace and estimated turnover of retail units in these locations are found in the relevant parts of the Strategic Retail Model (Appendix D). Where there is a clear relationship between these locations and existing town/District Centres this is described in the relevant centre below. This review does not include rural shopping provision, neighbourhood shopping locations within Aberdeen City and the larger towns and freestanding supermarkets/superstores.
- 1.3 The purpose of this review is to provide a standalone summary of retail issues relevant to each location. This will assist in the development of policies and proposals for these locations and provide baseline information useful for the appraisal of the significance of retail impacts arising from retail and other development proposals.

Scope of Retail Review

General

- 1.4 The review of each of these retail centres provides the following information:

- A description and overview of the location including: floorspace and number of retail units; estimated turnover; catchment areas and market penetration from each location; and anticipated changes over time.
- Vitality and viability assessment (town centre health check information)
- Review of key retail sectors.
- Identification of key retail issues including retail deficiencies.
- A summary of the provisions of the Proposed Retail Strategy which directly affects the centre.
- Summary and conclusions.

Description of Location

1.5 This provides information on the following:

- Geographical extent of centre
- Floorspace and key occupiers. Occupiers noted are judged to be significant in the context of the centre at the time of survey - in this way there will be some variation between which retailers are included within some centres compared to others.
- Estimated turnover in 2013 (2011 prices)
- Plans are provided showing the general extent of retail frontages in centres reviewed and, where relevant, existing town centre boundaries contained in the LDPs. Information contained in the plans should be regarded as indicative - its prime purpose is to demonstrate the general arrangement of retail floorspace within each retail location.

1.6 Figures for floorspace and numbers of units are primarily derived from Regional Assessor's figures which are mostly 2012 data. Where appropriate updates have been provided by reference to recent surveys undertaken.

1.7 Catchment areas and market penetration are shown diagrammatically with reference to the zones used in the Strategic Retail Model (SRM) zones (these are described in more detail in Volume 1). Catchment areas refer to both the primary ("PCA") and secondary catchment areas ("SCA") served by the proposed centres - these indicate the areas upon which the centre itself was dependant for its trade in 2013. Market penetration/share measures the proportion of available expenditure within a defined zone that is spent in a specific centre. The market penetration reflects the importance of a centre to residents in a specific geographical area - that is improvements or decline in the centre will have a direct bearing upon the ability of residents (and others) located within the areas to access retail and retail services.

Vitality and Viability

- 1.8 Town Centre Health Check information on the vitality and viability of the centre is summarised by reference to appraisals undertaken by Aberdeen City or Aberdeenshire and supplemented by surveys undertaken in 2013 for the study.

Review of Key Retail Sectors

- 1.9 This summarises the range, quantity and quality of provision of the principal retail sectors including factors such as subsectors present, the role of multiples and independents.

Retail Deficiencies

- 1.10 From the analysis undertaken using the SRM an analysis of quantitative and qualitative retail deficiencies has been undertaken and the implications of these in terms of both current provision and also future provision (taking into account market changes and existing retail commitments) is summarised.

Proposed Retail Strategy

- 1.11 This identifies those aspects of the retail strategy that have a direct effect on the retail location. This includes:
- Identification of the location within the retail network.
 - Existing retail commitments and proposals that would affect the location – this includes each of: proposals within the centre; proposals within the town (out of centre)/locality; and other proposals that could affect the market area currently served by the retail location.
 - Policy principles (e.g. protection of centre) relevant to the location.

Aberdeen City Centre

- 1.12 A more extensive analysis of retail issues affecting Aberdeen City Centre is presented in the first part of this Volume.

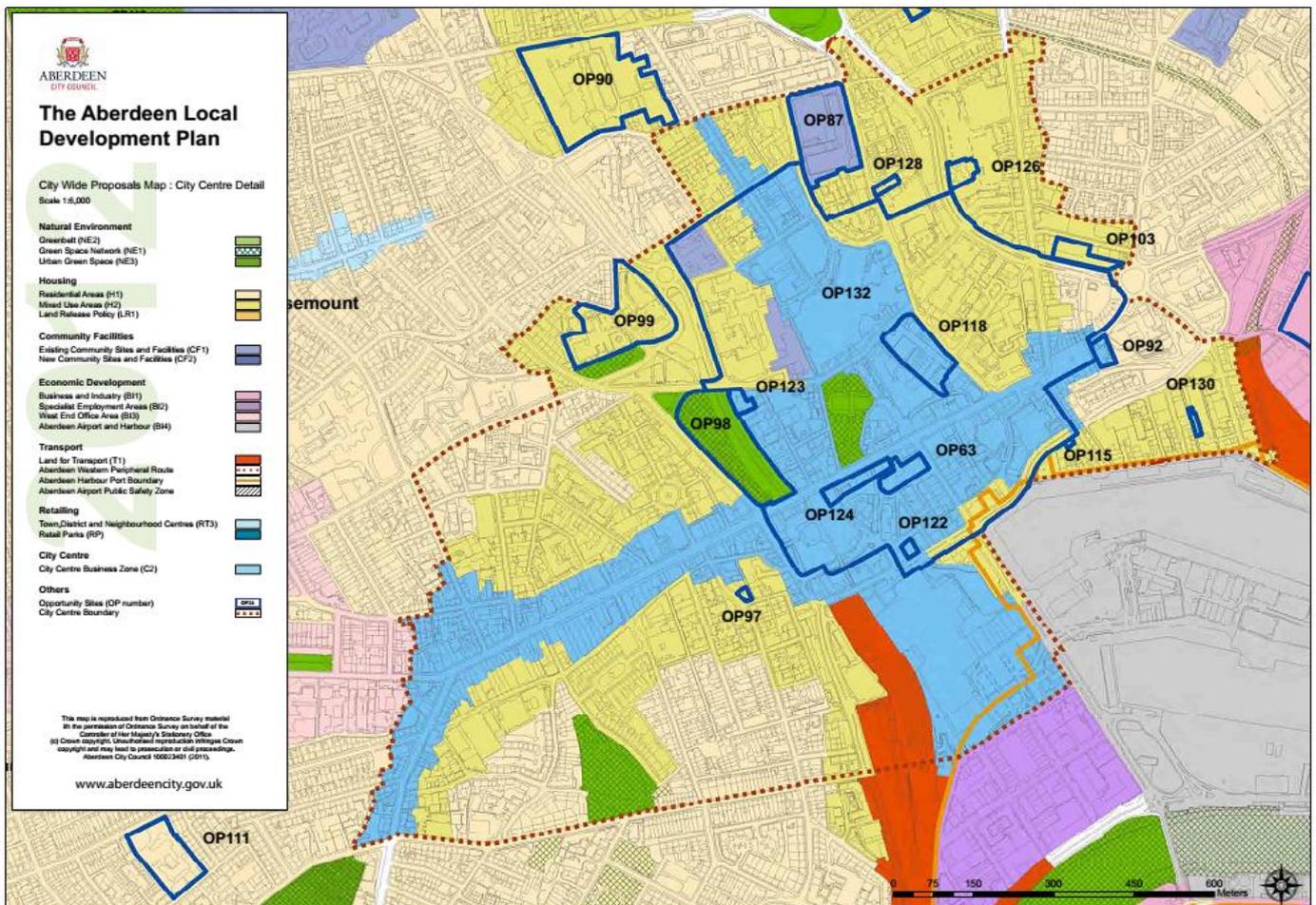
2 Aberdeen City Centre

Introduction

2.1 Aberdeen City Centre is the principal retail location in north east Scotland. The market area served by the centre includes not only the whole of the study area but also the remaining parts of Aberdeenshire and also draws significant trade from residents living in parts of Moray, Shetland and Angus.

2.2 Although the principal focus of retail activity is centred on Union Street the Local Development Plan identifies different areas for the definition of the City Centre. Figure 2.1 provides a copy of the City Centre detail from the LDP Proposals Map.

Figure 2.1: Aberdeen City LDP Proposals Map – City Centre Detail



2.3 The City Centre boundary includes all of:

- The City Centre Business Zone
- Extensive Mixed Use Areas; and

- Other areas of land allocated for additional uses including: land for transport; urban green space; predominantly residential areas; and community sites and facilities.

2.4 The City Centre boundary is therefore identified to include a range of uses and activities – not just retail. The focus of the current study is, however, primarily concerned with the retail function of the City Centre. This is described in the following terms:

- An overview of retail provision within the City Centre.
- Changes in retail and retail services provision within the City Centre since 2004.
- A review of the Vitality and Viability of the City Centre.
- Information on residents' attitudes to the City Centre from the household survey undertaken in 2013.
- The proposed Retail Strategy for the City Centre including a summary review of potential sites for large scales retail development in the City Centre.

Description of Retail Provision within the City Centre

Overview

2.5 The principal retail focus of the City Centre is Union Street. In effect principal retail units in the centre form north-south and east-west axes with the central point located at the junction of the St Nicholas Centre/Market Street with Union Street. The north-south axis runs from George Street in the north to Union Square and the east-west axis from Castlegate in the east to Holburn Street in the west. In this area, identified in Figure 2.1 as the "City Centre Business Zone" retail is the predominant land use – but, it should be noted that this area also includes extensive offices and significant retail and leisure uses.

2.6 The City Centre comprises a range of different types of retail location, including:

- Purpose built shopping malls – including Union Square, Bon Accord, St Nicholas, Trinity, Academy and the Galleria centres.
- Traditional "High Street" locations – particularly along Union Street but also Market Street, Bridge Street and Holburn Street amongst others. In these locations retail and retail service uses predominate along ground floor street frontages.
- Areas of mixed leisure and retail, in some cases associated with areas of pedestrian priority or low traffic flows (e.g. Belmont Street area). Often retail units are primarily small specialist and independent retailers.
- The indoor market on Market Street.

2.7 From Regional Assessor data, and using Goad definitions of retail and retail services, there were 891 retail and retail service units in 2013. This number should not be taken as a precise and permanent number of units

because, with a centre of this size, there will be continuous change in numbers and types of units. In detail the City Centre includes the following:

- Convenience goods shops: 75 units; 23,522 sq m GFA; and an estimated turnover of £83.4m. Convenience shops provide 8% of the total retail/retail service floorspace and 10% of retail goods turnover.
- Comparison shops (including those primarily retailing comparison goods): 385 units; 177,263 sq m GFA (of which 156,429 sq m is for general comparison goods and 20,833 sq m for bulky goods); and estimated turnover of £758.5m (£698.3m for general comparison and £60.2m for bulky goods). General comparison shops provide 58% of total floorspace and 83% of retail goods turnover. Bulky goods 8% of floorspace and 7% of turnover.
- Retail services: 365 units with 57,215 sq m GFA. Retail services provide 21% of floorspace.
- Vacant units: 66 units with 13,847 sq m GFA – 5% of total floorspace.
- Total: 891 retail and retail service units; 278,581 sq m GFA; and estimated retail goods turnover of £841.9m.

2.8 In overall terms the City Centre provides a very wide range of types of retail floorspace and retail operator. In 2012 out of the total 460 retail goods shops identified in the principal retail streets within the City Centre 171 (i.e. 37%) were national multiples. This is a very wide choice of national and international retail brands while, at the same time, it also indicates a large number of, and choice of, independent retail units.

2.9 These units also provide a wide range of choice of types of retail shop. Using a classification of types of retail unit (based on that identified in Goad surveys) which provides for 24 different types of retail goods shops, all are provided for in the City Centre. For most categories there is a good choice of shops present.

2.10 There is also a very wide range of size of units ranging from very small specialist shops (as well as small market stalls and similar) through to the major department and variety stores (the largest is John Lewis with over 16,000 sq m GFA).

Retail Malls/Shopping Centres

2.11 Within the City Centre there is a range of covered shopping malls/centres. These provide an important part of the retail offer in the City Centre and the largest of these are particularly important for national and regional multiples.

Union Square

2.12 Union Square opened in October 2009 developed and owned by Hammerson plc. In total it provides close to 50,000 sq m GFA of retail and leisure floorspace (including circulation space). The total retail goods floorspace within Union Square (excluding small stalls located within the malls) is, according to Regional Assessor data, 30,986 sq m GFA that is 15% of the total occupied retail goods floorspace of the City Centre. At present four units are being marketed as available and Hammerson advertise that the development is 97%

occupied (although the percentage of lettable retail floorspace occupied is less than this). Union Square comprises both a conventional retail mall and a retail park component with larger units fronting onto the car park. Union Square is located between the railway station and bus station and provides a direct link, through the mall, between the two. It has been suggested that the scheme has proved to be very successful commercially and that Hammerson are considering opportunities for expansion of the development. Key occupiers include M&S, Hollister, Zara and House of Fraser have introduced a new web based shop that can be accessed from a small unit within the centre. Union Square is dominated by national multiples and a large proportion of space is devoted to fashion clothing and footwear.

Bon Accord Centre

- 2.13 Bon Accord, together with the St Nicolas Centre, is now owned by F&C REIT having recently acquired the centre from the Scottish Retail Property Ltd Partnership – a joint venture between the Land Securities and British Land. It opened in April 1990 and has recently benefitted from an extension. The centre includes a first floor link into the John Lewis store on George Street. In total the Bon Accord provides 24,176 sq m GFA retail goods floorspace (total area of 29,729 sq m) and also includes a number of retail service units, notably cafes, in the first floor food court. Like Union Square the centre is dominated by national multiples with a high proportion of total floorspace for the retail of fashion clothing and footwear. In 2013 two units are vacant and being marketed. The John Lewis department store is in excess of 16,000 sq m GFA and is not included in the above figures for Bon Accord.

St Nicholas Centre

- 2.14 The St Nicholas Centre is located immediately opposite the Bon Accord Centre across Upperkirkgate/Schoolhill. It was opened in 1985 and is also dominated by national multiples however it includes a mix of clothing, footwear and other types of comparison goods and a Sainsbury convenience store. The centre is anchored by M&S. St Nicholas is smaller than either the Bon Accord or Union Square with 6,678 sq m plus M&S which 10,678 sq m GFA (it should be noted that the other M&S store, in Union Square is a further 4,840 sq m GFA). Two units are currently vacant. Almost all units at national multiples.

Trinity Centre

- 2.15 The Trinity Centre is the oldest of the four principal shopping centres and opened for trading in 1984 – just before the St Nicholas Centre in 1985. The Trinity Centre is owned by Rocksping UK. The centre is anchored by the Debenhams department store plus a range of smaller units (again, almost all are national multiples). However, unlike the other retail malls there is less reliance on clothing and footwear. Debenhams is a major store with 8,980sq m GFA and the remainder of the Trinity Centre is 5,796 sq m GFA.

Academy and Galleria

- 2.16 The Academy centre is located adjacent to Belmont Street and Schoolhill. This provides a more mixed development comprising retail goods shops, retail services and leisure facilities. Although the total floorspace of the development is 3,500 sq m only 753 sq m is currently occupied by retail goods shops – the most significant occupier is Jack Wills. This reduction in retail goods floorspace reflects the grant of planning permission for changes of use from retail to other uses (notably restaurants) for units 1-5 and unit 7 of the Academy since 2012.

2.17 The Galleria opened in 1998 comprises primarily retail service units. Two units are retail goods shops with only 112 sq m GFA floorspace.

Other Retail Provision

Union Street

2.18 Union Street is the principal route through the City Centre. At present buses have full access along Union Street allowing travellers to alight immediately outside many of the major City Centre shops. Both the Trinity Centre and St Nicholas Centre front directly onto Union Street which reflects the historic importance of the Street as the historic heart of the City Centre.

2.19 A wide range of retail units front onto Union Street. Those of particular retail importance include:

- Primark – 11,849 sq m GFA adjacent to the Trinity Centre
- BhS – located close to the junction with Market Street – 6734 sq m GFA. BhS occupies two floors above the Aberdeen market located to the rear of the units and also fronting onto Market Street.

2.20 In addition there are numerous retail units including independents, national and regional multiples goods shops and numerous retail service units.

2.21 Although retail units extend along the length of Union Street and along into Holburn Street (as well along numerous side roads) the character of the retail units gradually changes with reduced representation from national multiples, a higher proportion of convenience goods shops and greater non-retail uses as one travels west. This is not a steady transition – there are locations at the western end of Union Street where strong continuous retail frontages are located but, in general, the retail function changes from being the regional centre to more local shopping and related functions. A similar process of change can be identified along George Street north of John Lewis.

2.22 Elsewhere in the City Centre are other areas of concentrations of retail and retail service units. These include:

- King Street – especially in the part of the street close to, and including, the Morrisons superstore.
- Rosemount Viaduct – close to the junction of Skene Street, Rosemount Viaduct and Union Terrace.
- Crown Street area.
- Rose Street/Thistle Street area.

City Centre Initiatives

2.23 There are two important initiatives that support the retail function of the City Centre:

- Aberdeen Inspired – Business Improvement District commenced operating in 2011 with an initial duration of 5 years (but there will be opportunities for City Centre businesses to decide whether it

should continue after this). The BID has already undertaken or commenced a range of projects including: shop front improvements; promotion of “pop-up” shops; Way-finding project; and festivals.

- Townscape Heritage Initiative - focussing on improvements in and around The Green including conservation projects and bringing vacant floorspace back into use.

Distribution of Retail in the City Centre

- 2.24 Figure 2.1 showed that the current LDP identifies a “City Centre Business Zone” (“CCBZ”). However this does not directly relate to the principal areas of retail activity nor to the prime retail frontages within the City Centre. The area identified is very extensive – the total distance from the northern end of CCBZ to its western end is close to 2 kms. This is significantly longer than the full length of Glasgow City Centre retail (from Sauchiehall Street to Argyll Street) and longer than the full extent of Edinburgh City Centre (from the top of Leith Walk to the western end of Shandwick Place) – despite the fact that both Edinburgh and Glasgow are significantly larger retail centres than Aberdeen.
- 2.25 In general terms there is a change in retail character as one travels both west along Union Street and north along George Street. This is shown in Figures 2.2, 2.3 and 2.4. Figure 2.2 illustrates the general distribution of retail goods shops and retail services and the boundary of the CCBZ. The figure shows how the proportion of retail services increases west of the Music Hall, along George Street to the north of John Lewis and towards Castlegate.
- 2.26 Figure 2.2 includes vacant units but these are more clearly identified in Figure 2.3. This shows that, at the time of survey vacancies were widely distributed throughout the City Centre (including in the principal shopping malls). There is, however, a slight concentration in the western part of Union Street (as well as in the retail park part of Union Square) and, since this survey was undertaken, the largest vacant unit identified in Union Street is being converted to non-retail uses.
- 2.27 Figure 2.4 concentrates on the distribution of national retail goods shops multiples. It does not identify retail service multiples (for example café chains and banks). This shows that the multiples are concentrated in the retail malls and the central part of Union Street.
- 2.28 Figure 2.5 provides information on information flows that were collected as part of a separate study undertaken by SIAS/Streetwise commissioned by the City Council. These surveys were undertaken in October 2012. This indicates approximately average daily flows for pedestrians (two way) within the City Centre. Information for Bon Accord and Union Square are estimated from quoted annual footfall identified by the owners of these developments. The thickness of the arrows is generally proportionate to the total flow measured. This diagram shows a number of important characteristics of the City Centre:
- Significant pedestrian flows extend as far west as the Music Hall on Union Street. It is not possible to identify how flows change east of Market Street along Union Street because the nearest survey points included were on King Street and Castlegate.
 - If one considers pedestrian movement on both sides of Union Street these are slightly lower than identified for either Bon Accord or Union Square.

- The principal north-south movement of pedestrians appears to be (from north to south): George Street (John Lewis) – Bon Accord – St Nicolas Centre – Union Street – Trinity Centre – Station steps – Union Square. Movement along Market Street and through the Green is relatively limited.

2.29 The analysis presented in these diagrams indicates that the primary retail frontage within the City Centre is more limited than inferred from the CCBZ. The principal primary retail frontages, together with significant secondary and tertiary retail frontages are shown in Figure 2.6. It should be noted that this figure is indicative and does not identify all retail units within the City Centre as defined in the LDP.

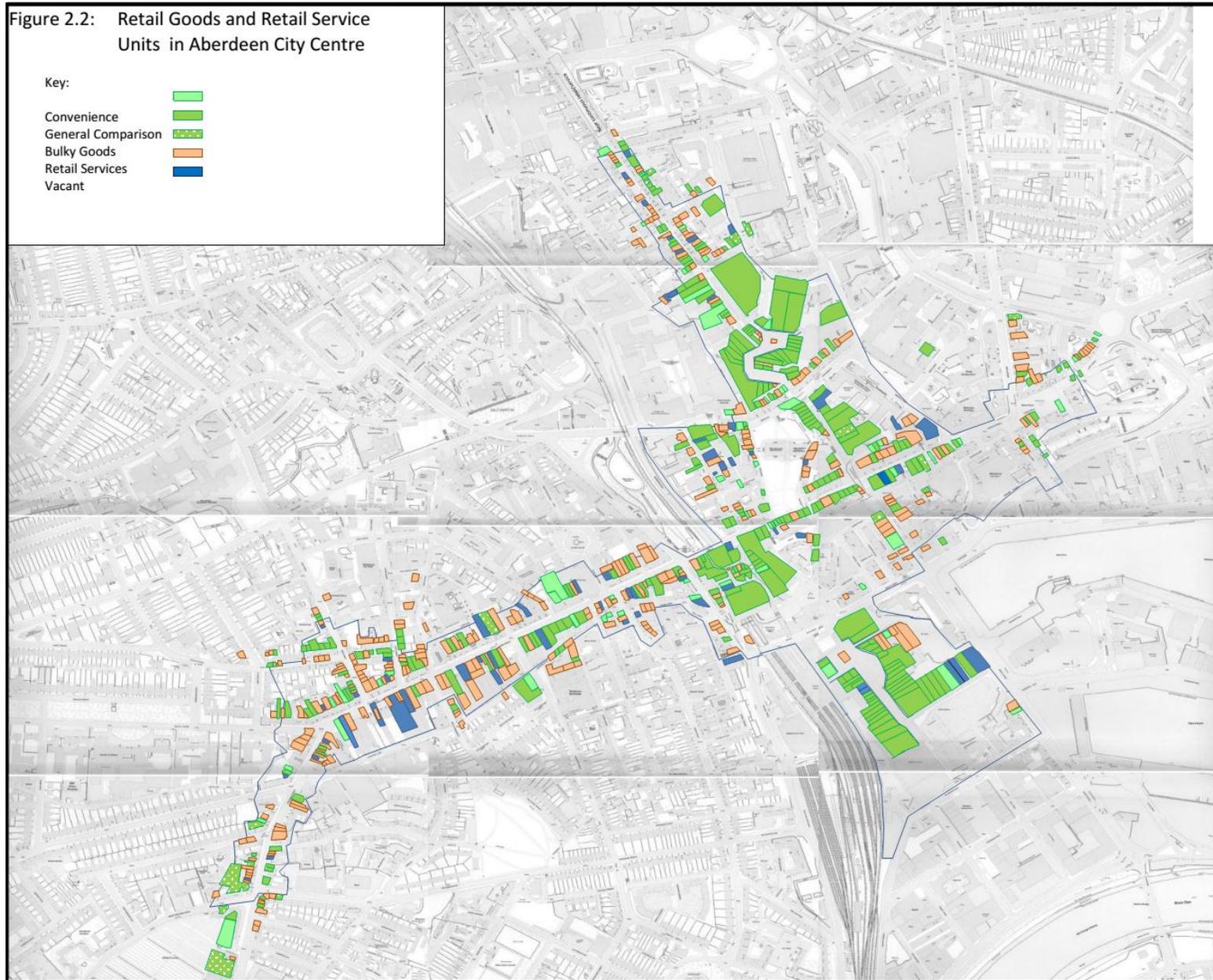
Market and Catchment Characteristics

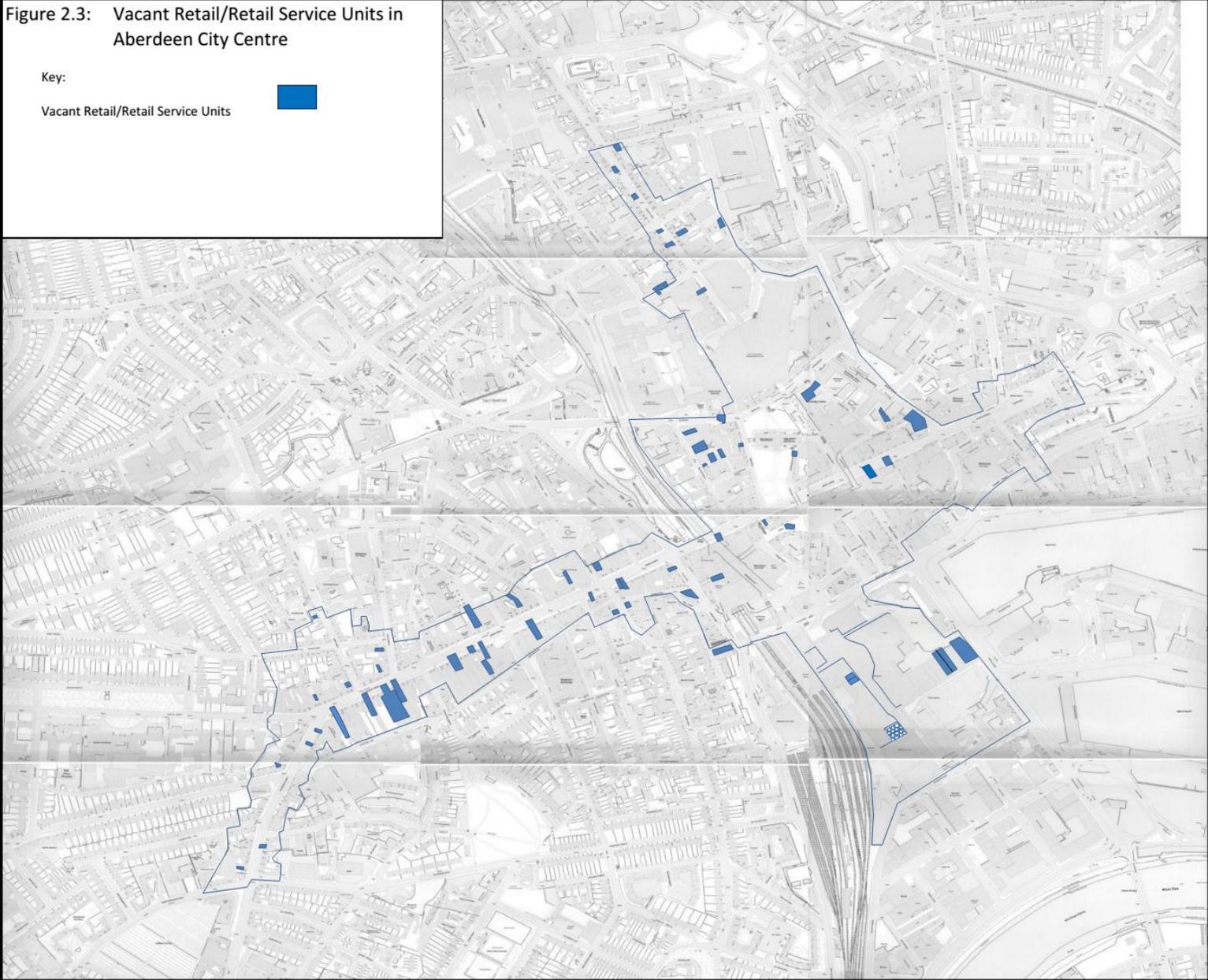
2.30 Figure 2.7 sets out key summary information for the market area served by the City Centre.

Convenience Goods

2.31 The primary and secondary catchment areas of convenience shops within the City Centre are generally quite limited. The most important convenience shop within the City Centre area is the Morrisons superstore on King Street but the area served by this store is limited as a result of competition from other superstores located throughout the City – in particular Sainsbury and Berryden and the superstores in Bridge of Don and Garthdee. Smaller convenience shops within the City Centre either provide a local top-up shopping function (for either City Centre residents or those visiting the centre for work or other activities) or, in a limited number of cases, provide specialty products that draw from a wide catchment (this includes those retailing perceived high quality foods – both independents and multiples such as M&S).

2.32 The primary catchment zone is identified to comprise primarily Zone 26 (the area to the north of Morrisons) and the secondary catchment area Zones 27, 28, 29N, 29S and 30 i.e. the central parts of the City. Within the catchment areas the market share is 33% in Zone 26 and nearly as high in Zone 30 (28%). However, reflecting the characteristics of the centre and that those visiting the centre are drawn from a wide area, trade is drawn from a wide part of the study area but, in this wider area, market share is low (typically up to 5% in Aberdeenshire zones) but higher in the secondary catchment area (up to 15% market share).





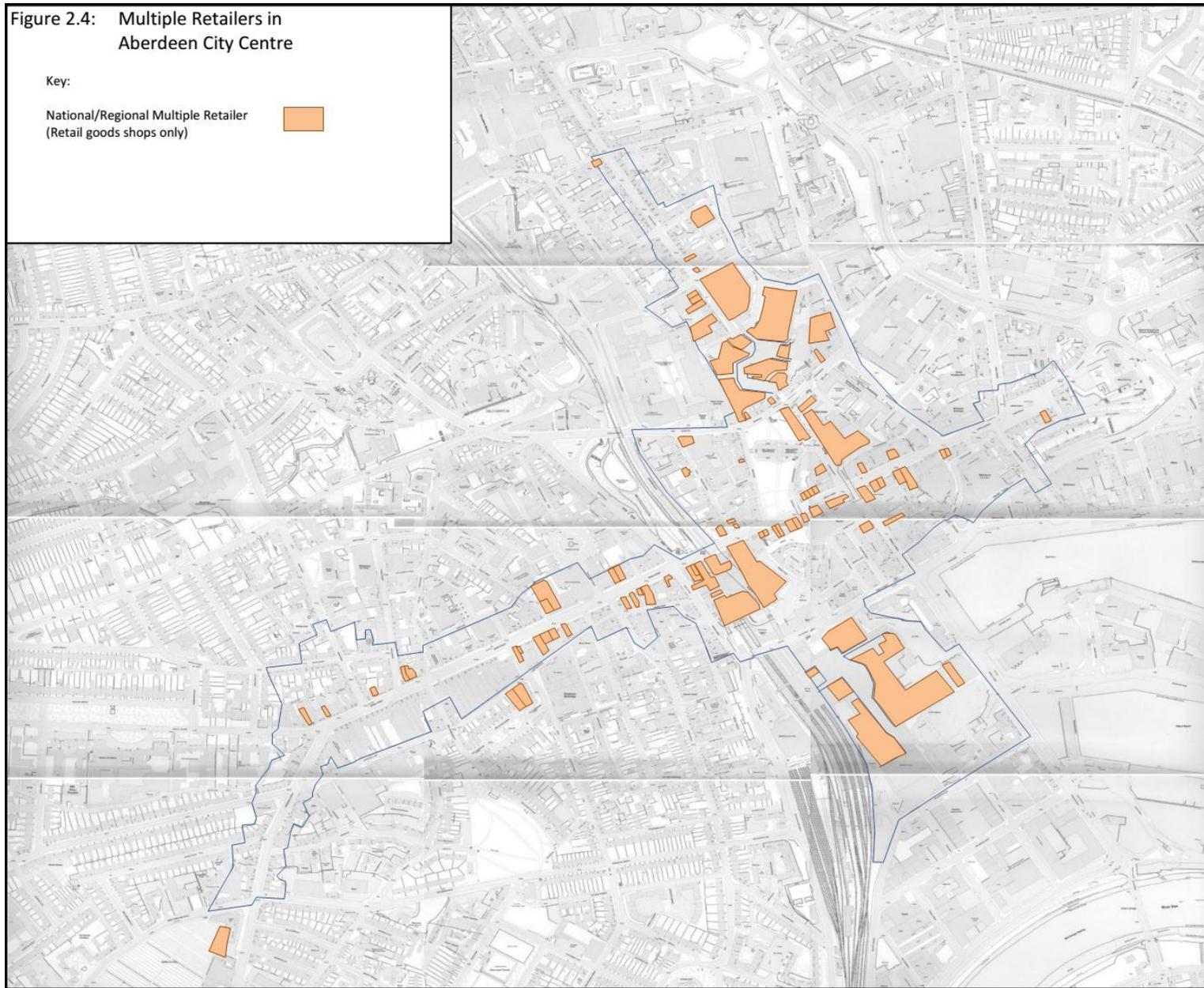


Figure 2.5: Pedestrian Flows in Aberdeen City Centre

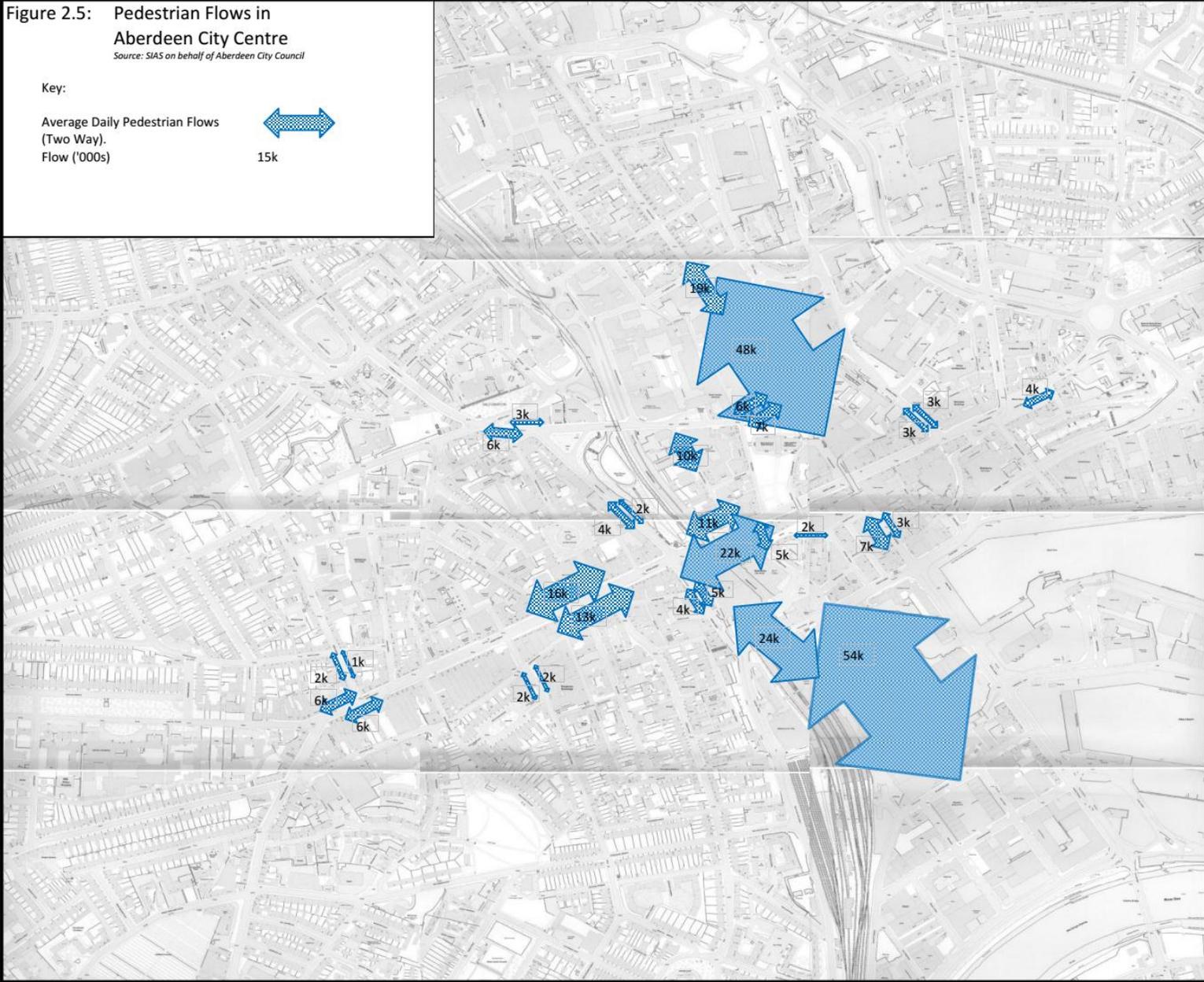
Source: SIAS on behalf of Aberdeen City Council

Key:

Average Daily Pedestrian Flows
(Two Way).
Flow ('000s)



15k



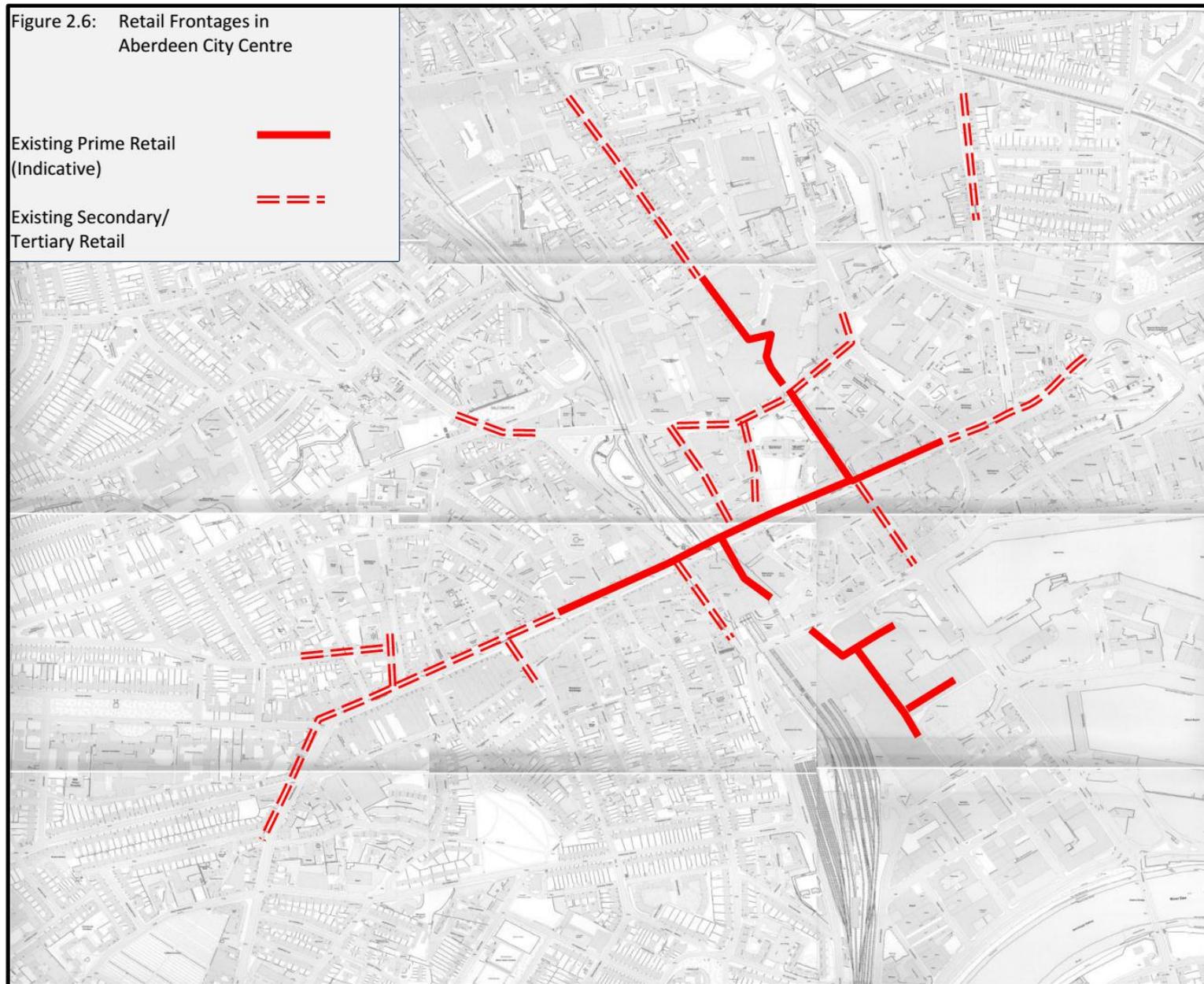
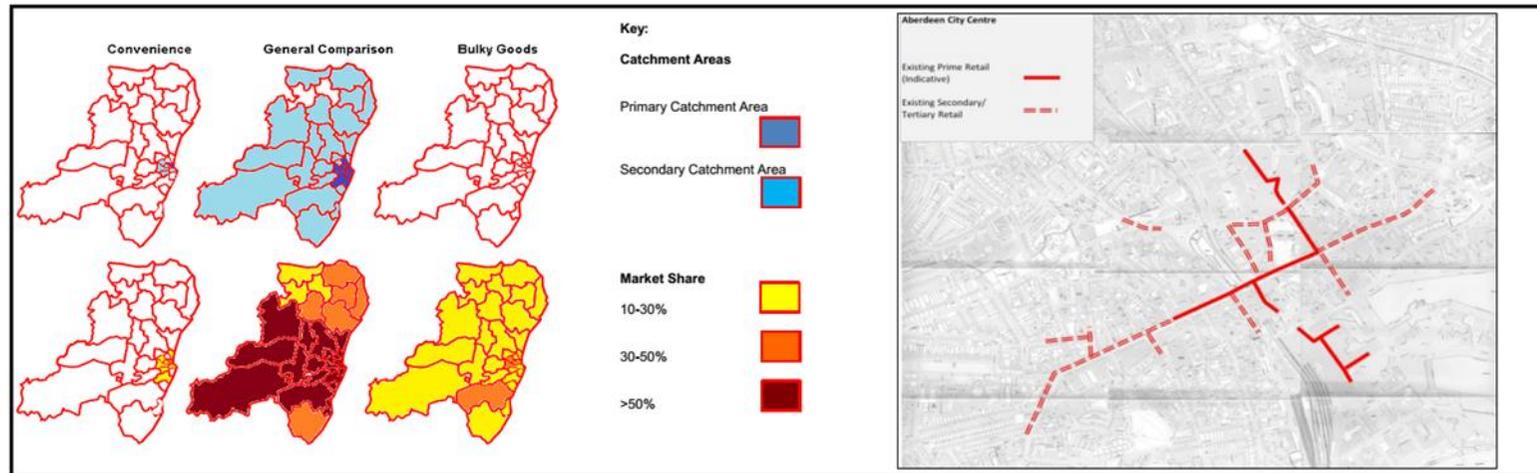


Figure 2.7: Aberdeen City Centre



Floorspace and Turnover 2013

	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m
Retail Goods Shops	460	23522	14665	5687	83	156429	101587	6874	698	20833	13499	4462	60	200785	129751	6489	842
Retail Services	365													57215			
Vacant	66													13847			
Total	891	23522	14665	£83.40m		156429	101587	£698.28m		20833	13499	£60.23m		271847	129751	£841.91m	

Recent Changes						Retail Goods Turnover £m		Vitality and Viability Summary		Retail Strategy Summary	
Year	Conv	Comp	No. of Units Ret Services	Vacant	Total					Centre Classification	City Centre
2004	74	397	308	65	844	£625.32m		<p>Strengths: Low vacancy rate; high sales densities; rents and yields; range of retail; range of diversity of services and uses within centre; range of multiples and independents; quality of shopping experience; high pedestrian flows.</p> <p>Weaknesses: Limited food retail offer, adverse impacts of traffic on amenity; pedestrian congestion.</p> <p>Others</p> <p>Other surveys of perception of centre indicate: Good for choice of shops for clothing and footwear; and as a good place to combine trips for a range of purposes. Adequate-good for: personal goods bulky goods shopping; easy to travel to by car; access by public transport; attractive place to visit: as a place to combine shopping with personal business. Poor for easy and cheap to park.</p> <p>Vacancies are marginally below national average (8.6% by number of units in 2012).</p> <p>Slightly above average levels of satisfaction for all convenience goods shopping but marginally below average for comparison goods shopping. High levels of satisfaction for ease of access to the centre. Overall slightly above average levels of satisfaction for the city centre as an attractive place to shop.</p> <p>Summary: generally strong indicators of vitality and viability.</p>		Proposed Retail Floorspace	
2013	75	385	365	66	891	£841.91m	35%			Commitments	
										Proposals	30,000 sq m GFA City Centre scheme

General Comparison Goods

- 2.33 The primary and secondary catchment areas of the City Centre extend over most of the study area. This reflects the regional role of the City Centre as the most important retail location in the north east of Scotland. The primary catchment area includes most of the City and the secondary catchment area most of Aberdeenshire – those areas not included within the SCA have a low population which limits their importance as far as the City Centre is concerned. However, in terms of the importance of the City Centre as a place for comparison goods shopping to residents this is seen by the relatively high levels of market share *throughout* the study area. The City Centre accounts for over 50% of all general comparison goods expenditure for large parts of the central and western parts of the study area. This proportion declines slightly to the north and south – to the north because of the comparison goods offer available in Peterhead and Fraserburgh and to the south reflecting the influence of Dundee. In the north west of the study area the market share declines further (to approximately 20-25% of available expenditure) reflecting a combination of relative remoteness from Aberdeen and proximity to comparison goods offer in Elgin and Inverness and shopping for these goods in nearby town centres (including Inverurie). Nonetheless, even in these areas where market share is lower, Aberdeen City Centre remains the most important destination for comparison goods shopping – for example the total leakage of expenditure outwith the study area from these Zones (to places such as Elgin and Inverness) is less than the expenditure directed to the City Centre.
- 2.34 Using information from retail studies in Moray, Dundee and Angus the Strategic Retail Model also identifies that 9% of total trade in the City Centre for general comparison goods originates from those living outwith the study area – the most important area being Moray but also Angus & Dundee, Shetland and the Highlands are significant.

Bulky Goods

- 2.35 Expenditure on Bulky Goods within the City Centre is considerably smaller than for general comparison goods and slightly less than for convenience goods. However the trade draw for this is evenly spread across the whole of the study area. This is assumed to reflect the importance of the small number of major retailers of these goods which are department/variety stores (notably John Lewis and M&S) and that these have a very wide retail draw. As a result it is not possible to identify clear primary and secondary catchment areas – except insofar as Zones within the city will be more important by virtue of their larger populations as a result Figure 2.7 has not identified either primary or secondary catchment areas.
- 2.36 The market share of the City Centre shops for bulky goods is, nonetheless, significant. Figure 2.7 shows that this is between 10% and 30% for almost the whole of the study area with limited areas having a slightly higher market share. It should be noted that the differences in market share for these higher zones and neighbouring zones is quite limited and no particular significance should be attached to this.

Changes over Time

- 2.37 Since the 2004 study significant new retail floorspace has been developed and occupied in Union Square and extensions implemented for the Bon Accord centre. However there has also been the loss of floorspace – both in terms of the closure of major units (such as Esselmont and Mackintosh) and also more gradual changes in smaller units from retail goods shops to retail services (many of these changes would not even have required planning permission because many retail services uses are included within Class 1 of the Use

Classes Order). These latter changes have been particularly significant in secondary and tertiary retail pitches. Nonetheless there has been significant overall growth in retailing within the City Centre:

- *Convenience Goods*: total convenience floorspace has *increased* from 18,882 sq m GFA to 23,522 sq m GFA (+25%) but turnover has *declined* from £125¹m to £83.4m (-33%). This demonstrates the impact of superstores elsewhere in the City on City Centre floorspace for main food shopping requirements.
- *General Comparison Goods*: total general comparison floorspace has *increased* from 106,598 sq m GFA to 161,480 sq m GFA (+51%) and turnover has also increased from £378m to £698.3m (+85%).
- *Bulky Goods*: total bulky goods floorspace has *decreased* from 33,750 sq m GFA to 22,517 sq m GFA (-33%) but turnover has *increased* from £51.5m to £60.2m (+17%).
- *All goods*: total retail goods floorspace has increased from 159,590 sq m GFA to 207,519 sq m (+30%) and turnover from £555m to £841.9m – an increase of 52%.
- *Retail services* floorspace has actually *declined* from 64,945 sq m to 57,215 sq m (-12%).
- *Vacancies* have declined from 24,403 sq m GFA to 13,847 sq m (-43%).

2.38 These figures demonstrate the changing role of the City Centre – in particular its role as a general comparison retail centre has become even more dominant with the result that now general comparison accounts for 58% of total retail/retail service floorspace and 83% of turnover (in 2004 it accounted for 75% of turnover but had the same proportion of total floorspace).

2.39 Within the City Centre the increase in retail goods floorspace (i.e. for comparison goods) has been focussed within the prime retail areas – the Bon Accord extension and Union Square together provided over 35,000 sq m of additional gross floorspace – these alone account for most of the net additional change. In contrast much of the lost retail goods floorspace has been located in the peripheral parts of the City Centre.

Aberdeen City Centre Vitality and Viability

2.40 A full assessment of the vitality and viability of Aberdeen City Centre is set out in the Retail Centre Health Checks undertaken by Aberdeen City Council. The following provides a summary of this information together with additional information obtained as part of this Study.

Rents and Yields

2.41 In 2011 GVA Grimley identified that Prime Zone A rents in Aberdeen City Centre were £1453 psm and yields at 6.6%. In terms of traditional centres Aberdeen is the third strongest centre in Scotland (after Glasgow and Edinburgh) in terms of both rents and yields. It has retained this position for a considerable period of time.

¹ AARS in 2004 identified this as £90.93m in 2001 prices, this has been rebased in 2011 prices). For the period 2001-11 there has been 38% inflation for convenience goods but 18% deflation for comparison goods.

2.42 Between 2010 and 2011 rents remained static whereas yields strengthened (from 6.75% to 6.5%). Since 1988 GVA report that prime rents have increased approximately 60%.

2.43 Figure 2.8 summarises key market data for prime retail property in the four largest cities in Scotland (Aberdeen, Dundee, Edinburgh and Glasgow).

Figure 2.8: Scottish Cities – Key Prime Retail Indicators

	Aberdeen	Dundee	Edinburgh	Glasgow
Prime Zone A Rents				
2009	£1,776	£1,184	£2,368	£2,691
2010	£1,453	£969	£1,938	£2,530
2011	£1,453	£969	£1,938	£2,530
Prime Zone A Yields				
2009	7.30%	8.00%	6.80%	6.80%
2010	6.75%	7.25%	5.50%	4.75%
2011	6.60%	7.00%	5.00%	4.75%

2.44 The data indicates that Aberdeen has reflected changes taking place in other major centres in Scotland: rents initially fell but have since stabilised; yields have, however, become more “firm”; vacancy levels have declined; and, primarily reflecting the occupancy of space by national and international retailers in Union Square, the ranking of the city centre in UK terms (excluding London) has improved.

2.45 Ryden, in their October 2012 review, identify Aberdeen City Centre as benefitting from a number of new retail additions – primarily linked to new occupiers in Union Square but also both Bon Accord/St Nicholas have seen significant new occupiers and even the Trinity Centre has attracted the Card Factory.

2.46 In Scotland as a whole Ryden state that they expect the shift from major to smaller foodstore proposals to continue.

Multiple Retailer Representation

2.47 In 2013 460 retail goods shops were identified within the City Centre, of these 171 (37%) were national multiple retailers. This is about average for this type of centre. The size of the centre provides a wide range of choice for shoppers seeking both national (and international) brands and also independent or local shops. The centre continues to attract new retailers – during 2012 a number of international retailers, some occupying their first stores in Scotland, have been attracted to Aberdeen, especially to Union Square. These include Joules, River Island (Concept Store), Cath Kidston and Hollister.

Occupier Demand and Development Activity

2.48 According to GVA Grimley, using the Focus database up to 2010, the numbers of operator requirements for Aberdeen City appeared to decline substantially from 2005 to 2010. It is possible that this reflects the development of the Union Square mall which provided substantial opportunities for retailer demands for space to be met together with the impact of the recession on retailer demand.

- 2.49 The City Centre has seen significant investment in retail space apart from the Union Square development. This includes the redevelopment of the former Esslemont and Mackintosh Department Store which has recently seen investment with Oliver's Kitchen occupying part of the ground floor in 2013. The proposals for the redevelopment of St Nicholas House includes a limited amount of new retail floorspace (approximately 1800 sq m GFA).

Vacancy Rates

- 2.50 Using Regional Assessor data there were 66 vacant retail/retail service units in the City Centre – this is a vacancy rate of 7.4% by number of units and 5.0% by floorspace. This level is significantly below Scottish and UK average vacancies at the current time (although at the bottom end of historic average range for Scotland i.e. prior to the current recession). In terms of number of vacant units the current figure is very close to that identified in 2004 (7.7%) but a significant reduction in terms of floorspace (which was 9.8% in 2004). This shows that, despite a significant increase of modern floorspace in the City Centre since that date, demand for space has matched supply.
- 2.51 Figure 2.3 shows that there are no particular concentrations of vacancies. Those areas with slightly higher concentrations of vacancies are towards the western end of Union Street and in the retail park section of Union Square.

Mix of Uses/Activities

- 2.52 As noted earlier in this section in August 2012 there were 460 retail goods shops, 365 retail service units and 66 vacant retail/retail service units according to the Goad definition of units. All categories of retail and retail service units identified by Goad are present in the City Centre. Almost all categories provide a good choice for shoppers with the result that the town centre has a balanced range of types of retail unit and retail service units.
- 2.53 The mix of uses in the town centre is an important component for contributing towards town centre vitality. In the City Centre, as well as shopping, the following are found in, or in the area around, the City Centre:

- Clubs
- Churches/Places of Worship
- Pubs/Bars
- Police station
- Hotels
- Job Centres
- Clinics
- Scottish Enterprise Offices
- Skills Dvpt Scotland/Training services
- Dentists
- Private medical surgeries
- Music Hall
- Newspaper Office
- Cinema
- Bus Station
- Railway Station
- Missions
- Council Offices
- Museum/Arts Centres
- Art galleries etc
- Voluntary Services Agencies etc
- Community Centre
- Courts
- Bus Information Office
- Citizens Advice Bureau
- Tourist Information Centre
- Casino
- Funeral Director
- MSP Office
- Robert Gordon College

- 2.54 The above indicates a wide range of additional services or facilities are found within or adjacent to the City Centre.
- 2.55 The LDP designation of extensive mixed use areas also indicates the diversity of uses within the City Centre. These include extensive offices, government, leisure and entertainment uses. In addition adjacent to the City Centre is Aberdeen Harbour which is a very busy port for both industrial shipping (associated with supplying the North Sea oil and gas fields) and public ferries (notably to Shetland and Orkney). The proximity of such an important port immediately adjacent to a major City Centre is unique in the UK and this adds significantly to the vitality and character of the City Centre.

Environmental Quality and Amenity

- 2.56 The Aberdeen City Council health check of the City Centre sets out a full appraisal of the environmental quality of all parts of the City Centre. This identifies over 330 listed buildings within the City Centre plus two Conservation Areas. In summary the appraisal identifies that, in many areas the environmental quality of the City Centre is very high whereas in others it is more mixed. Parts of the City Centre (including the shopping malls) are pedestrianised or traffic calmed which enhances pedestrian amenity whereas in others traffic adversely affects amenity. Areas of public open space are also identified although, when compared to some other cities (e.g. Edinburgh) there is less public open space within the City Centre. Further details are provided in the City Centre Health Check prepared by Aberdeen City Council.
- 2.57 Currently there are proposals for the part pedestrianisation of Union Street between Market Street and Union Terrace which would include the removal of buses from this part of Union Street.

Accessibility

- 2.58 The City Centre is served by a wide range of transport modes with excellent public transport accessibility including both bus and rail. Bus routes penetrate into the heart of the City Centre with numerous routes along Union Street and the bus station located adjacent to Union Square. For car parking there are over 4700 managed off street parking spaces and in the region of 9000 on-street parking spaces.

Pedestrian Flows

- 2.59 Information on pedestrian flows has been provided in Figure 2.4. This shows average daily flows as high as 50,000 persons per day in the prime retail locations in the shopping malls and, along Union Street daily flows totalling 33,000 per day (counting both sides of Union Street) were identified. These would not be the highest flows along Union Street – unfortunately flows between B&S and M&S were not measured in the survey. The surveys also show that pedestrian counts significantly decline away from the prime retail frontages.
- 2.60 By way of comparison Aberdeenshire Council pedestrian counts are expressed in terms of hourly flows with the highest identified for Peterhead. Expressing the flows on a common basis would indicate that the highest City Centre flows measured along Union Street would be approximately five times higher than identified for Peterhead (which was the highest of the Aberdeenshire towns).
- 2.61 No information is available for changes in flows over time – national trends are for these to decline reflecting a range of factors (such as increased out of centre floorspace, greater use of car for shopping trips, use of the internet with home delivery, and increasing opportunities for alternative activities other than shopping).

Public Perceptions of the City Centre

2.62 Full information on the surveys of attitudes to the City Centre, which was undertaken as part of the household survey, is set out in detail below. In summary the City Centre is identified to be:

- **Good** for choice of shops for clothing and footwear and as a place to combine trips for a range of purposes.
- **Adequate to Good** for: personal and bulky goods shopping; easy to travel to by car; access by public transport; attractive place to visit; and as a place to combine shopping with personal business.
- **Poor** for: easy and cheap to park.

2.63 In overall terms there are above average levels of satisfaction of the City Centre as a place to shop.

Overall Rankings

2.64 In the 2009 Experian Retail Rankings Aberdeen was ranked 20th in the UK in terms of “best performing” retail centre in the UK (it was third in Scotland). This is significantly higher than identified in earlier rankings – in 2004 it was ranked 30th and in 2002 39th. This rise will reflect the opening of Union Square. Experian no longer provides these retail rankings having replaced them with a broad assessment based on market potential.

2.65 An alternative ranking system is provided through Javelin Venuescore rankings. This is based on an assessment of multiple retailers only and therefore does not consider all aspects of a retail location, nor does it consider characteristics of the catchment area and so on. According to the 2013 Venuescore survey Aberdeen is ranked as 12th in the UK. Because this is a different ranking system from that used by Experian it is not possible to compare the 2009 and 2012 rankings.

Conclusion

2.66 Because of the wide variety of indicators used for assessing vitality and viability it is difficult to provide a simple single measure of the health of a centre. Nonetheless for many of the indicators summarised above the indication is that the vitality and viability of the City Centre is strong but that there is considerable variation within the different parts of the centre. The prime retail areas within the city, i.e. those areas shown in Figure 2.6, remain generally strong whereas more peripheral areas notably the west end of Union Street, are significantly weaker. If one considers the City Centre as a whole it would appear that, despite the effects of the UK recession, the City Centre has remained robust and, if anything, has strengthened over the past decade. This probably reflects two key factors – the strength of the north east economy which has been less affected by the recession than other parts of the UK and Scotland, and trends that have favoured market concentration in the largest centres. Although only assessing multiple representation within the City Centre the latest Javelin ranking is surprisingly strong for the City Centre. It should be emphasised though that, because of the nature of this ranking system, it does not reveal anything about the condition of the secondary and tertiary retail areas within the City Centre where few multiples are present.

Attitudes to Aberdeen City Centre – Household Survey Results

2.67 The Household Survey undertaken in May 2013 provides extensive information on the attitudes of residents within the study area to the City Centre as a shopping destination. Questions about the City Centre were asked of all households and therefore included those who regularly used the Centre as well as those who undertook retail and related trips to locations other than the City Centre.

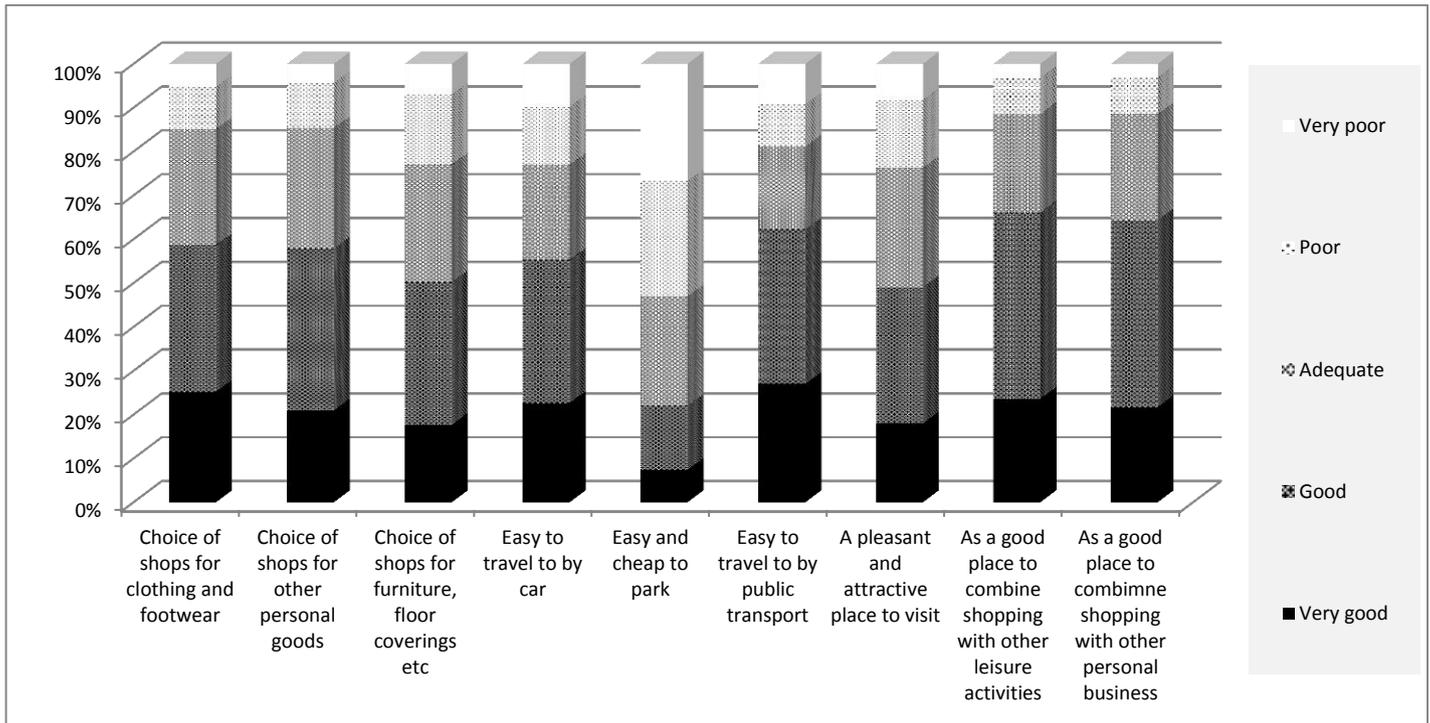
Rating of City Centre Characteristics – All Households

2.68 In the survey questions were put to all households to identify how they rated specific aspects of the City Centre. The results are summarised in Table 2.1 together with a “weighted score” (“adequate” would equate to a score of 3) to give an overall rating of the quality of attribute in the City Centre. Figure 2.8 presents this information graphically.

Table 2.1 Rating of City Centre Attributes – All Households

	1	2	3	4	5	6	7	8	9
Count	Choice of shops for clothing and footwear	Choice of shops for other personal goods	Choice of shops for furniture, floor coverings etc	Easy to travel to by car	Easy and cheap to park	Easy to travel to by public transport	A pleasant and attractive place to visit	As a good place to combine shopping with other leisure activities	As a good place to combine shopping with other personal business
Very good	691	526	427	565	181	657	511	591	474
Good	919	924	783	817	361	858	880	1060	933
Adequate	727	689	645	541	616	459	773	562	528
Poor	263	255	385	332	647	234	437	205	181
Very poor	145	111	170	246	661	226	235	83	70
Don't know	255	495	590	499	534	566	164	499	814
Grand Total	3000	3000	3000	3000	3000	3000	3000	3000	3000
Percentage									
Very good	25%	21%	18%	23%	7%	27%	18%	24%	22%
Good	33%	37%	32%	33%	15%	35%	31%	42%	43%
Adequate	26%	28%	27%	22%	25%	19%	27%	22%	24%
Poor	10%	10%	16%	13%	26%	10%	15%	8%	8%
Very poor	5%	4%	7%	10%	27%	9%	8%	3%	3%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
<i>Rating</i>	3.6	3.6	3.4	3.4	2.5	3.6	3.4	3.7	3.7

Figure 2.8: Rating of City Centre Attributes – All Households



2.69 The rating shows that, with the exception of access and cost of car parking, the City Centre is rated favourably – most weighted scores were between 3.4 and 3.7 i.e. mid-way between “adequate” and “good”. These responses were consistent across all categories of types of shopping (excluding convenience goods shopping which is considered below), all modes of transport/access and as a place to visit. The strong responses to the last two questions i.e. to combine shopping with other activities, are indicative of the wide range of activities other than shopping found in or close to the City Centre and also the importance of facilities for both personal business and other business activities.

Rating of Key Characteristics – Rating of Regular Users

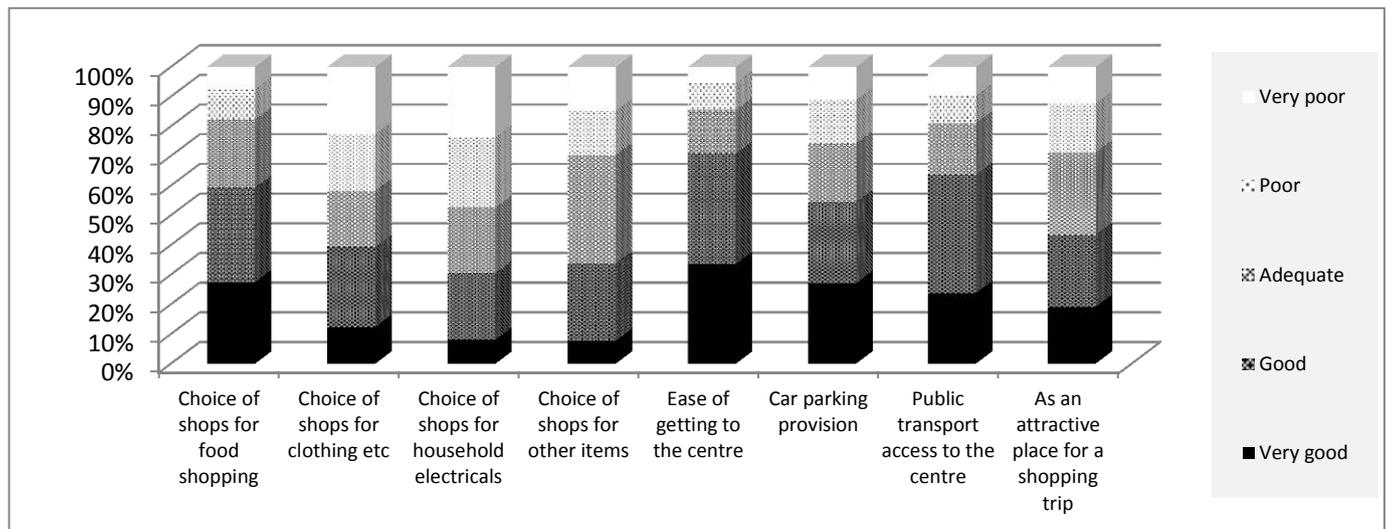
2.70 The survey also included questions, similar to those identified above, for those who identified the City Centre as the principal location for food shopping trips. In total just under 10% of those interviewed across the Study Area identified the City Centre as their principal location for food shopping. These respondents were mostly located close to the City Centre – the average journey time for this group to the City Centre was 15 minutes with 39% of respondents taking less than 10 minutes to travel to the City Centre. Nearly half of this group would travel to City Centre shops by car (either as driver or passenger), 30% by bus or coach and the remainder (14%) walked to City Centre shops.

2.71 This group was asked a similar range of questions to those reported in Table 2.1 but this also included questions about choice for food shopping. The responses from this group did, however, differ from the wider population and these are summarised in Table 2.2 and Figure 2.9.

Table 2.2: Rating of City Centre Attributes – Regular Users

	Choice of shops for food shopping	Choice of shops for clothing etc	Choice of shops for household electricals	Choice of shops for other items	Ease of getting to the centre	Car parking provision	Public transport access to the centre	As an attractive place for a shopping trip
Count								
Very good	79	33	21	20	98	63	60	55
Good	91	72	58	66	108	63	101	70
Adequate	66	50	58	94	43	46	44	80
Poor	29	51	61	38	26	34	23	47
Very poor	22	61	62	38	16	26	25	36
Don't know	7	27	34	38	3	62	41	6
Grand Total	294	294	294	294	294	294	294	294
Percent								
Very good	28%	12%	8%	8%	34%	27%	24%	19%
Good	32%	27%	22%	26%	37%	27%	40%	24%
Adequate	23%	19%	22%	37%	15%	20%	17%	28%
Poor	10%	19%	23%	15%	9%	15%	9%	16%
Very poor	8%	23%	24%	15%	5%	11%	10%	13%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%
<i>Rating</i>	3.6	2.9	2.7	3.0	3.8	3.4	3.6	3.2

Figure 2.9: Rating of City Centre Attributes – Regular Users



2.72 The survey results show that, for this group of households, the City Centre was not viewed quite as favourably. Interestingly it is not the lack of food shopping that is perceived as a weakness – this was rated higher than other types of shopping. It is not clear why this group, in effect those who undertake frequent shopping trips to the City Centre, should consider the centre as a less attractive location than the wider population.

Competing Retail Centres

2.73 All households were asked about other cities that were used for shopping trips. In total 26% of all households named other cities that they used for shopping trips – the most common were Glasgow (8%), Edinburgh (6%), Dundee (4%), and Inverness (3%). The dominant type of goods purchased from these cities was clothing

(named by 20% of all respondents) with the remainder a mixture of gifts, food, furniture and then a wide range of other types of goods.

- 2.74 These responses confirm that there is a significant level of expenditure leakage from the study area to other major cities. However the results are consistent with the view that Glasgow is the largest retail centre in Scotland and that it serves, in effect, a Scottish wide retail market followed by Edinburgh. Other cities such as Dundee and Inverness have some importance, especially for those living closest to these cities within the study area and may, in a limited number of cases, be able to provide certain goods, or operators, not found in Aberdeen. These flows of expenditure leaking out of the study area are generally balanced by flows of expenditure into Aberdeen from those living outwith the study area.

Conclusion

- 2.75 The household survey provides useful information on attitudes to the City Centre both from those who use the City Centre as a shopping location on a regular basis and for all households living in the study area (regardless of whether or not they choose to shop in Aberdeen). The results indicate generally positive views about the range of retail on offer within the City Centre, ease of access to the City Centre and as an attractive place to visit. The only significant issue attracting overall negative comments concerned the availability and cost of parking. For those who undertook regular trips to the City Centre results were generally consistent with the wider sample but identified lower levels of satisfaction with the non-food retail offer – the reasons for this difference are not clear.
- 2.76 These results confirm that the catchment area for food shopping in the City Centre is relatively limited (the average journey time to the City Centre for this group was only 15 minutes) whereas there is good familiarity and satisfaction with non-food shopping provision within the City Centre across the whole of the study area supporting the analysis of a much wider comparison goods catchment area. They also support the conclusions that the City Centre has, in overall terms at least, generally strong indicators of vitality and viability.

Proposed Retail Strategy

- 2.77 The Proposed Retail Strategy described in Volume 1 of this Report includes a number of recommendations for Aberdeen City Centre. These recommendations concern: its position and function in the retail hierarchy; proposals for new retail floorspace within the City Centre; and other policy recommendations including the identification of a prime retail area within the City Centre.

Regional Centre

- 2.78 The proposed Retail Strategy identifies Aberdeen City Centre as the Regional Centre within the network of retail centres. This is the principal retail location for the north east of Scotland. This reflects:
- The very wide range of retail, retail service, and non-retail public and commercial services and facilities located within the City Centre.
 - That the City Centre provides a focus for both City- and region- wide community and as a focus for transport.

- The catchment area for the principal retail floorspace within the City Centre comprises the whole of the Aberdeen City and Aberdeenshire and is also an important retail destination for expenditure from neighbouring local authority areas.

2.79 As a result of this the Proposed Retail Strategy identifies:

- That the City Centre should be the preferred location for all new retail development serving the city-wide and region-wide markets. For these types of development the City Centre should be the first location to be considered in terms of the application of the sequential approach – this is consistent with the current approach identified in the current Aberdeen City LDP “Supplementary Guidance City Centre and retailing – Hierarchy of Centres” Figure 1.
- An Existing Principal Retail Area within the City Centre. For the application of the sequential approach for new city-wide or region-wide market retail floorspace this boundary should be used to define the boundary of the City Centre retail area.
- Other important retail areas within the City Centre (including the west end of Union Street etc). In terms of the sequential approach these areas should be regarded as first choice locations for retail (and leisure) development that has a more limited market area and as appropriate edge-of-centre locations for major retail development (serving city-wide and region-wide markets). It should be noted that other locations within the defined City Centre may also be considered to be edge-of-centre locations for these major retail developments provided that they satisfy the normal considerations for the identification of edge-of-centre locations.
- Promotes new retail development sites within, or on the edge of, the prime retail area of the City Centre.
- Seeks to protect the Existing Principal Retail Area and other important retail locations within the City Centre (including secondary and tertiary locations such as the western part of Union Street) from adverse impact from proposed new retail (and leisure) development proposals.

Identification of City Centre Retail Development Sites

2.80 The recommended retail development strategy proposes the identification of sites to accommodate approximately 30,000 sq m GFA retail floorspace to support long term retail growth within the City Centre. The potential sites that were reviewed to establish their potential for accommodating this scale of development are shown in Figure 2.10. This figure also shows the boundary of the Existing Principal Retail Areas and the approximately location of significant primary and secondary retail frontages within the City Centre (as shown in Figure 2.6 above).

2.81 Table 2.3 provides a summary assessment of the potential sites based on a general review of the potential of the sites to accommodate significant retail development in the long term (i.e. by 2022 or later). A detailed assessment of the sites has not been undertaken. It should also be noted that other sites were considered in the appraisal but which rejected as unsuitable. These included Union Terrace Gardens which were not included on the grounds that earlier development proposals on this land have been rejected by Aberdeen City Council. Although this location would present benefits from a retail perspective non-retail factors (notably

adverse environmental and amenity impacts) confirm that Union Terrace Gardens would not be an acceptable location for large scale retail development.

2.82 None of the sites can be regarded as straightforward for major new City Centre retail development. All are dependent upon the willingness of owners to undertake substantial investment and, given the recent difficulties in the retail market, it is likely that, in the short term at least, there may be reluctance to enter into a protracted and complicated development process.

2.83 However these sites do present the potential to accommodate substantial new retail floorspace within the City Centre.

Major Retail Development Sites

2.84 From the perspective of supporting retailing within the City Centre and providing high quality pedestrian links to existing retail floorspace the preferred location for accommodating a major new retail development would be Site C at Schoolhill. However it appears very unlikely that this site would be able to come forward because of both Robert Gordon University (RGU) and Robert Gordon College (RGC) aspirations for the future use of the site. Therefore, although this site should be monitored and dialogue maintained with these organisations, the preferred site for a major retail development site would be Site A, Denburn. Alternatives (sites H and I) should be considered if it is clear that neither Site A Denburn nor Site C Schoolhill would be available in the long term.

Other Retail Development Sites

2.85 Each of the other sites identified has some potential for new retail floorspace. With the exception of Site E St Nicholas House, only Site D George Street/Crooked Lane has the potential to significantly increase the quantity of retail floorspace in the City Centre. Sites F and G (Market and Union Street) would primarily provide an improvement in the quality of space.

2.86 Both Site D (Crooked Lane) and Site E (St Nicholas House) provide the opportunity to link in directly with the existing retail malls (Bon Accord and St Nicholas respectively). Both provide opportunities because of relatively straightforward land ownership however there may be significant issues associated with existing tenants at Crooked Lane. St Nicholas House offers an important retail opportunity but the existing preferred development for the site does not realise this opportunity and therefore the site appears to offer only limited potential for the provision of additional retail floorspace at the current time.

2.87 Site B may provide long term development potential only after the development of either Site A (Denburn/Woolmanhill) or Site D (George St/Crooked Lane) and only if the current proposals for the site do not come to fruition. As a result this site is not identified in the recommended development strategy.

Figure 2.10: Aberdeen City Centre Potential Development Sites

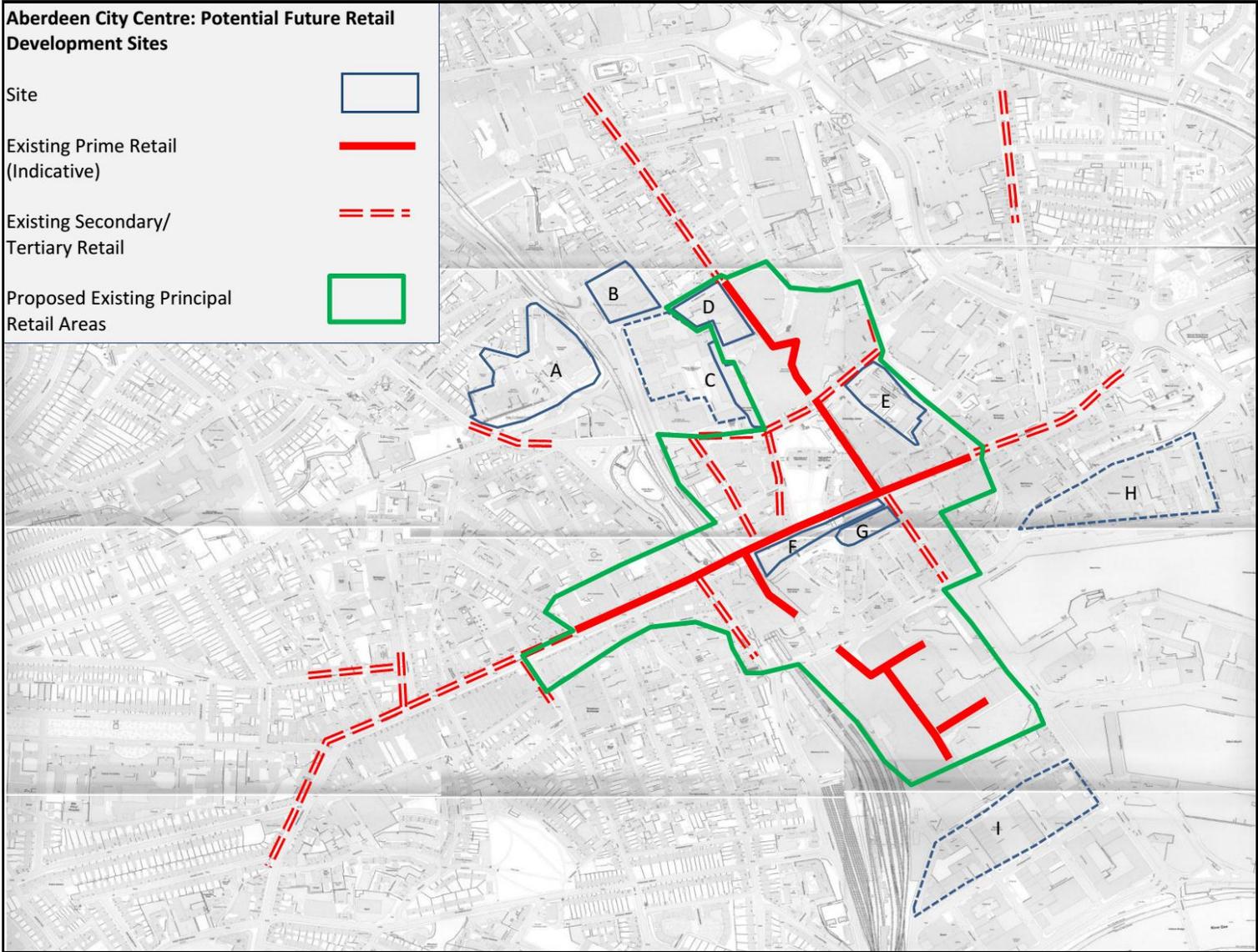


Table 2.3: Review of Potential City Centre Retail Development Sites

Site	Area & Potential Retail Capacity	Summary Appraisal	Conclusion and Recommendation
A. Denburn/Woolmanhill	1.90ha Ca. 20,000 sq m (all net additional floorspace)	<ul style="list-style-type: none"> • Current use: healthcare and car park + some other uses • Category A listed buildings; relocation of health centres; potential flood risk • Limited ownership; direct access from Denburn Road; likely to be commercially attractive • Distant from existing prime retail • Site has substantial development constraints and requires consideration of improving linkages from the site to the remainder of the City Centre. Nonetheless the site provides a clear long term opportunity for strengthening the retail offer of the City Centre. Its advantage is that it can be seen to provide balanced distribution of retail around the City Centre but the principal disadvantage is that it could be spreading the City Centre retail across a wide area. 	Recommend: Identify as preferred large scale development site if Site C is confirmed not to become available.
B. RGU – St Andrew St	0.65ha Ca. 7,000 sq m GFA (all net additional space)	<ul style="list-style-type: none"> • Current use: vacated university buildings • Current proposals for student housing understood to be well advanced • University ownership; • Some distance from existing prime retail but closer to secondary pitches • The site is not well related to existing prime retail and is unlikely to provide the scale of retail to create a clear and strong retail destination in isolation of other development proposals . It is understood that the site is the subject of proposals for alternative uses which are at an advanced stage. However it should be noted that if, in the future, development occurs on sites A or D then the site could provide long term development potential. 	Recommend: Not identified as potential retail site.
C. RGU/RGC - Schoolhill	0.6 – 2.0 ha (part or full site) 7,000-25,000 sq m (all net additional space)	<ul style="list-style-type: none"> • Current use: vacated university buildings (limited part site); school • Current proposals for hotel/housing on RGU part. No indication at this stage of RGC wishing to relocate • University and school ownership • Site is close to prime retail pitches and would also support Belmont St area. • The site is very well located in terms of consolidating and strengthening the retail heart of the City Centre. Only part of the site is currently available and it is understood that proposals for alternative uses on this part are well advanced. The greatest opportunity and benefit for the City Centre would be the redevelopment of the site as a whole and this is only possible in the long term (requiring the relocation of the school) and there is no guarantee that the whole site will become available even in the long term. This long term uncertainty is not likely to satisfy the university requirements for disposal of part of the site. 	<p>Large site that offers the greatest potential for integration with existing prime retail areas and consolidation of retail within the City Centre.</p> <p>RGC have confirmed that they have no intention of moving from this site in the foreseeable future and have recently acquired part of the RGU buildings. This therefore presents a fundamental constraint to the deliverability of the site.</p> <p>Recommend: continue to monitor position with RGC and RGU to establish whether future potential of whole or part of site.</p>

Site	Area & Potential Retail Capacity	Summary Appraisal	Recommendation
D. George St/Crooked Lane	0.6ha 7,000 sq m (net additional = 6,000 sq m GFA)	<ul style="list-style-type: none"> • Current use: existing retail and retail services plus rear parking • Two existing land owners for whole site • Vehicular access via St Andrews St; • Adjacent to Bon Accord and opposite John Lewis – well connected to prime retail • The relatively simple land ownership of the site and its proximity to prime retail presents a clear opportunity for redevelopment for good quality retail use. The development capacity of the site is, however, limited and alone, it will not address the long term growth potential of the City Centre. 	Recommend: Identify as potential retail development site.
E. St Nicholas House	0.90 ha 10,000 sq m (or 2,000 sq m existing proposals) All net additional space	<ul style="list-style-type: none"> • Former council building + Lord Provost Skene's House • Aberdeen City Council ownership • Constraints; Category A listed building; on-going tendering process for redevelopment with preferred bidder providing only limited retail space. • Adjacent to prime pitch (St Nicholas Centre) – potential to link with centre • Despite the constraints associated with Provost Skene's House the site is very well located for the improvement of retail within the City Centre and current proposals for the site do not realise the full potential of the site for this use. • The principal constraint is that the tendering process for the site has progressed which may limit the potential for a substantial increase in retail within the site. Furthermore the greatest potential is for the redevelopment of the site together with St Nicholas Centre. Current proposals for the site are for <2000 sq m retail floorspace in the proposed redevelopment scheme. 	<p>Progress with the current tendering process is expected to provide a major constraint to progressing as a significant retail development site. However the site has potential to provide an extension to St Nicholas Centre.</p> <p>Recommend: confirm with Aberdeen City Council and preferred bidders whether there is any potential to reconfigure proposals to provide major new retail floorspace.</p>
F. 73-149 Union Street	0.30 ha 8,000 sq m GFA Net additional retail – 2,600 sq m GFA	<ul style="list-style-type: none"> • Existing prime retail including national multiples • Multiple land ownership • Listed buildings • Role of development would reinforce historic core and make better use of upper and basement levels. • Redevelopment of this site can result in a qualitative improvement in the retail offer but it is unlikely that this will result in a significant quantitative increase in retail floorspace in the City Centre. Units are in multiple ownerships which will constrain the potential for a comprehensive redevelopment scheme. 	<p>Redevelopment of site can result in significant qualitative improvements to the prime retail pitch but will not significant contribute to additional quantity of City Centre retail space.</p> <p>Recommend: identify as City Centre retail redevelopment opportunity.</p>

Site	Area & Potential Retail Capacity	Summary Appraisal	Recommendation
G. Aberdeen Market	0.35 ha 12,500 sq m GFA (max) Net additional – 5500 sq m GFA (in place of indoor market)	<ul style="list-style-type: none"> Existing prime retail on upper floors (BhS) and lower floors indoor market Single institutional ownership Adverse impact on existing major City Centre retailer; physically constrained site. Close to prime retail pitch – potential to significantly improve linkages between Union Street and Union Square. Site is in single ownership however the upper floors of the building are used by a major retail multiple (BhS). Redevelopment would need to take into account the needs of BhS. The market comprises numerous stall holders and although relatively well used the retail environment is poor. Redevelopment would be feasible and this could create a significant improvement in the building quality and provide the potential for improving linkages between Union Square and Union Street however it will be very unlikely to result in a significant quantitative increase in retail floorspace. 	<p>Redevelopment of site can result in significant qualitative improvements to the prime retail pitch but will not significantly contribute to additional quantity of City Centre retail space.</p> <p>Recommend: identify as City Centre retail redevelopment opportunity.</p>
H. Virginia Street/Regent Quay	2.00 ha Ca. 23,000 sq m GFA All net additional space	<ul style="list-style-type: none"> Current use: diverse range of different occupiers and owners – including significant number of residential properties Flood risk; listed buildings; multiple land ownership; traffic access and role of harbour traffic High profile to Virginia Street but relatively remote from prime pitches Development would create new retail area and has potential to improve eastern end of Union Street Although the site has potential comparable to Site A Denburn the large number of ownerships would make this a very difficult site to deliver 	<p>Site has significant constraints and has less retail benefits in the City Centre than other major sites. However site has some potential if preferred sites are unable to progress.</p> <p>Recommend: review site at later date pending progress with preferred alternatives.</p>
I. Union Square South	Ca. 2.6ha 15,000-30,000 sq m All net additional	<ul style="list-style-type: none"> Current use: multiple commercial and industrial uses and occupiers Multiple ownership Development builds upon the commercial success of Union Square Constraints: land ownership; flood risk; listed buildings Multiple land ownership render site assembly relatively difficult but the close relationship of this area to Union Square with an active developer increases the likelihood of this scheme being progressed. The site has clear potential to deliver significant additional floorspace but the location does not assist the consolidation of and linkages within the City Centre. 	<p>Site has significant constraints and has less retail benefits in the City Centre than other major sites. However site has some potential if preferred sites are unable to progress.</p> <p>Recommend: review site at later date pending progress with preferred alternatives.</p>

2.88 The proposed development strategy for new retail floorspace in the City Centre is as follows:

Major Retail Development Sites:

- Identify land at Denburn/Woolmanhill (Site A) for major new retail development. As part of this identify mechanisms to support the integration of this site with the remainder of the City Centre.
- Monitor position and liaise with RGC and RGU regarding future potential of land at Schoolhill (Site C). If this site has the potential for redevelopment in the future then it should be identified as the preferred major retail development site within the City Centre.
- Review other major sites (Site H – Virginia St and Site I – Union Square South) only if no progress can be made with either Sites A or C).

Other Retail Development Sites:

- Identify the following sites for City Centre retail development:
 - Site D – George St/Crooked Lane
 - Site F – 73-149 Union Street
 - Site G – Aberdeen Market
- Continue to review the position with Aberdeen City Council and the preferred bidder to establish whether retail content of redevelopment scheme at St Nicholas House can be significantly increased with improved linkages to St Nicholas Centre and other prime retail areas.

Other Aspects of the Proposed Retail Strategy

2.89 In addition to the above the proposed Retail Strategy gives support to initiatives that aim to support the vitality and viability of the City Centre including proposals for the pedestrianisation/traffic calming of Union Street (and elsewhere), environmental improvements and transport infrastructure improvements.

3 Aberdeenshire

3.1 The following locations are described in this section:

Banchory

Banff

Ellon

Fraserburgh

Huntly

Inverurie

Peterhead

Portlethen

Stonehaven

Turriff

Westhill

Banchory

- 3.2 Key data for retail provision in Banchory town centre is provided in the Figure 3.1 provided at the end of this section.

Overview of Retail Provision

- 3.3 Retail provision within Banchory comprises both the town centre and also two supermarkets – the Co-op and Tesco located in the eastern part of the town. In addition there is a garden centre located on the northern edge of the town.

Banchory Town Centre

- The town centre comprises 71 retail and retail service units – 7 convenience, 34 comparison, 28 retail services and 2 vacant units.
 - The total retail goods and services floorspace is 8,578 sq m of which 16% is convenience goods, 35% general comparison, 17% bulky goods, 30% retail services and 2% vacant.
 - Retail goods turnover is estimated to be £12.5m (2011 prices) with 21% from convenience goods, 57% from general comparison and 10% from bulky goods.
 - There is no key anchor in the town centre. The centre is predominantly independents with only 4 retail goods multiples present in 2013.
- 3.4 A key feature of the town centre is the role of retail and service units serving the Deeside tourism trade (including day visitor trade). The town can be regarded as a gateway to Royal Deeside and the Cairngorms National Park. In addition it has a limited convenience goods offer. The town has had an out of centre supermarket for a considerable number of years (Co-op, formerly Somerfield) and, more recently, a new large Tesco supermarket is located on the eastern edge of the town. Notwithstanding this Banchory as a whole acts as the principal retail location serving Deeside – the convenience goods provided primarily via the two supermarkets and comparison goods and services through the town centre. The town centre acts as a key focus for the town and also surrounding rural communities and villages.

Out of Centre Provision

- 3.5 The two supermarkets provide significant out-of-centre retail floorspace and turnover. The gross floor area of these two stores is identified to be 6,891 sq m GFA with a turnover of £41.6m i.e. considerably greater than the turnover of the town centre as a whole.

Changes over Time

- 3.6 Total numbers of retail goods and service units in the town centre have remained reasonably constant since 1999 although there has been some fluctuation with reduced numbers of units identified in surveys over the period 2004-2008 but with a return to former levels by 2012. However there has been a significant shift from retail goods shops to retail service units with the latter increasing from 32% of all units (by number) in 1999 to almost 40% in 2013. Vacancies have remained at a low level throughout this period.

- 3.7 Turnover in the town centre is estimated to be marginally higher (in constant price terms) between 2004 and 2013 – with an increase in retail turnover of 1% despite the reduction in numbers of retail units. This growth has occurred despite the loss of some convenience turnover to the Tesco supermarket.

Catchment Area

- 3.8 The catchment area served by retail units in the town centre as a whole (i.e. town centre and out of centre) is predominantly Deeside – the primary catchment is, as expected, the town of Banchory and immediate environs with the secondary catchment extending as far as Braemar. This is broadly the same as the position identified in 2004 except that the catchment has extended slightly further westwards – this probably reflects the role of the new Tesco store. Within the catchment area market penetration is relatively high for convenience goods in the primary catchment but low for comparison goods in all areas.

Town Centre Health Check

- 3.9 In overall terms Banchory town centre exhibits strong indicators of vitality and viability. This includes the following:

- *Range of Retail offer:* the town centre provides most categories of retail units identified in Goad surveys but with limited choice. Within the town centre the principal exceptions are: lack of main food shopping; men's wear; motor accessories; jewellers and pets.
- *Range of retail and non-retail services:* the town centre provides a wide choice of restaurants and cafes and also a good range of other services although a couple of sectors are not represented in the centre (e.g. travel agents).
- *Shopper/household survey information:* for the town as a whole there is a good level of satisfaction with food shopping but lower levels of satisfaction for comparison goods. In overall terms it is seen as an attractive place to shop.
- *Types of retail operator:* the town centre has a strong independent sector but there is a below average level of representation by national/regional multiples present (4 no. = 10% of retail goods shops).
- *Pedestrian flows:* these have been identified to be below average for Aberdeenshire towns in 2011 and also that flows have declined significantly over the past decade.
- *Vacancy rates:* only 2 units are vacant which is 3% by number and 2% by floor area. This is well below national average.
- *Environment:* the town centre presents a high quality and attractive environment.

Review of Retail Sectors

- 3.10 Within the town as a whole representation in convenience sectors is as follows:

- Reasonable representation of independent specialist retailers.

- One convenience-format store.
- One medium- and one large format supermarket (Co-op and Tesco respectively).
- No limited assortment discounter or freezer-type shop.

3.11 Comparison goods shops within the town centre are predominantly small – these are well suited for independents but not to national or regional multiples who seek larger unit sizes. Over half of the units are less than 100 sq m GFA and only 15% are greater than 200 sq m GFA.

Future Prospects

3.12 The catchment area served by Banchory is anticipated to experience steady population growth which, combined with expenditure growth per capita, will result in a growing retail market. If Banchory is able to maintain market share then turnover of shops in both the town centre and out-of-centre would be expected to grow.

3.13 However long term changes to retailing would result in concentration of comparison goods retailing towards larger centres – including Aberdeen City Centre and major retail units such as those located at Garthdee. The development of a new town centre for Elsick and the potential for a new supermarket serving Stonehaven will also have implications for the market area served by Banchory shops (both those located within the town centre and the out-of-centre supermarkets).

3.14 As a result of these factors it is anticipated that the overall growth of retailing in Banchory will be steady but not dramatic. It is likely that retail turnover in the town centre could grow in the region of 5-10% by 2017. However this will depend upon wider economic factors and also the ability the tourism industry in Deeside to grow.

Key Retail Issues and Retail Deficiencies

3.15 For convenience goods no quantitative retail deficiency is identified for Banchory. This reflects the presence of two supermarkets and a range of smaller convenience units in the town centre.

3.16 Key retail issues are identified to be:

- The lack of mid- and large-sized retail units in the town centre (for both comparison goods and also certain convenience sectors). It is unlikely that the retail market would support the development of new retail units of this size in Banchory.
- The potential impact of new retail floorspace in Elsick and Stonehaven affecting retail provision. This is most likely to affect convenience retailing and will have greatest impact on the out-of-centre supermarkets.
- The independent retail sector is of particular importance to Banchory town centre and adds to the attractiveness of the centre to tourist trade. It is anticipated that tourism will continue to support demand for small-scale units within the town centre. This could also result in future demand for larger-

scale tourist related retail but this could adversely affect town centre trade if located outwith the town centre or elsewhere in Deeside.

Proposed Retail Strategy

3.17 The recommended Retail Strategy proposes:

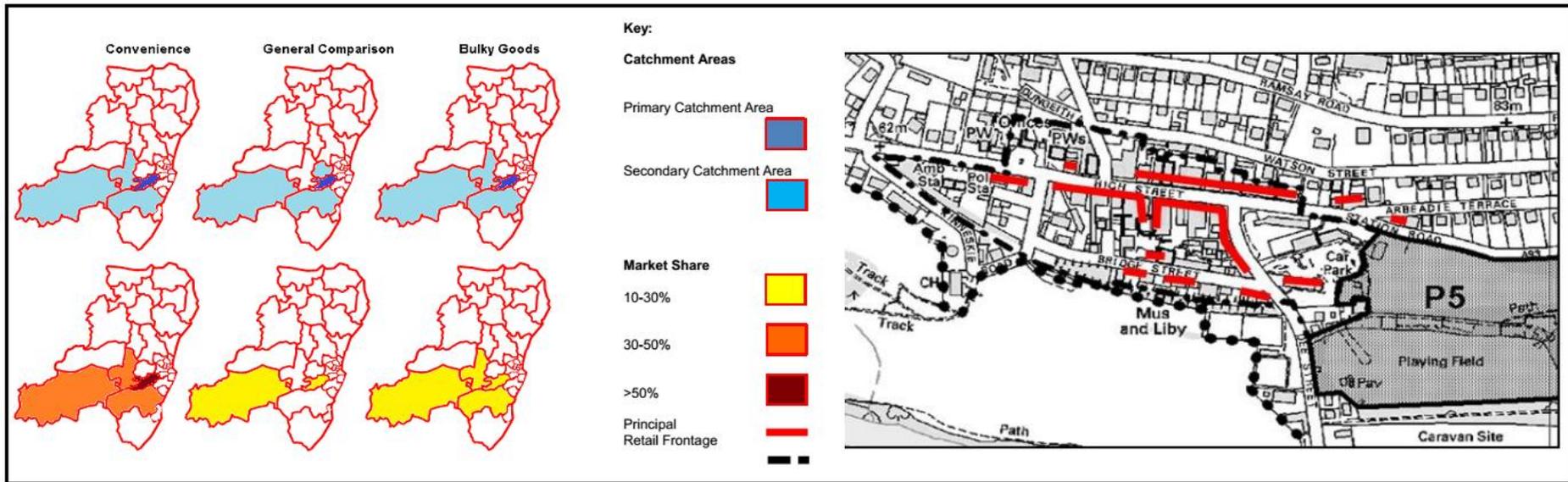
- Identification of Banchory centre as a **town centre** in the retail network.
- Neither the Tesco nor Co-op supermarkets are identified as commercial centres in the network of centres.
- Policies to protect Banchory town centre from adverse impact from retail proposals. No such protection is proposed for either of the supermarkets.
- No retail proposals for additional floorspace in either the town centre or elsewhere in or near Banchory.

Summary and Conclusions

3.18 Despite its small size and the development of major new retail floorspace Banchory town centre has remained resilient in terms of retail units and turnover. This has reflected its specialist role as an important tourist and day-visitor destination with a high quality of environment in the town centre. As a result the town centre has maintained strong indicators of vitality and viability and modest turnover growth. It is anticipated that this will continue with market growth being countered by wider changes in retailing that will support market concentration to larger centres and also potential new retail floorspace at Elsick and Stonehaven that would compete for trade for some of Banchory's shops.

3.19 The recommended Retail Strategy continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. No protection is proposed for the out-of-centre supermarkets. No proposals for additional retail floorspace are proposed.

Figure 3.1: Banchory



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m
Retail Goods Shops	41	1339	870	1991	2.67	3027	1968	3604	7.09	1481	963	2873	2.77	5847	3800	3295	12.52
Retail Services	28													2552			
Vacant	2													179			
Total	71	1339	870		£2.67m	3027	1968		£7.09m	1481	963		£2.77m	8578	3800		£12.52m

Recent Changes							Vitality and Viability Summary		Retail Strategy Summary	
Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m	Strengths	Centre Classification	Town Centre	
1999	6	39	22	2	69		Good levels of satisfaction for food shopping provision, accessibility and as an attractive location for shopping. Lower satisfaction for comparison goods offer. Consistently high level of rating in AC health check. Low vacancy rates (<5%). Strong independent sector but limited multiples. Summary: generally strong indicators of vitality and viability.	Centre Classification	Town Centre	
2004	7	31	22	1	61	£12.39m		Strengths	Planning Policy Approach	Protection
2006	6	30	24	2	62			Others	Proposed Retail Floorspace Commitments	
2008	7	32	22	3	64				Proposals	
2012	7	34	28	2	71	£12.52m				
2013	7	34	28	2	71	1%				

Banff

3.20 Key data for retail provision in Banff town centre is provided in the Figure 3.2 provided at the end of this section.

Overview of Retail Provision

3.21 Retail provision within Banff primarily comprises the town centre.

Banff Town Centre

- The town centre comprises 84 retail and retail service units – 10 convenience, 36 comparison, 31 retail services and 7 vacant units.
 - The total retail goods and services floorspace is 17,131 sq m of which 21% is convenience goods, 38% general comparison, 14% bulky goods, 20% retail services and 7% vacant.
 - Retail goods turnover is estimated to be £29.0m (2011 prices) with 53% from convenience goods, 38% from general comparison and 9% from bulky goods.
 - There is no key anchor in the town centre, however, the existing Tesco supermarket accounts for 11% of the retail goods floorspace and an estimated 31% of retail goods turnover. The centre comprises mostly independent traders with a limited number of multiples.
- 3.22 Planning permission has been granted for a new Tesco large supermarket/small superstore to be located within the town centre as defined in the LDP. This store would be 4,292 sq m GFA – a net increase of 2,970 sq m and would represent a significant increase in total retail floorspace in the town centre if implemented.
- 3.23 It should also be noted that, relatively close to Banff town centre, is the retail provision in Macduff town centre. Although Macduff centre is significantly smaller than Banff it provides a further 40 retail and retail services units and the retail goods shops are estimated to have a turnover of £5.7m.

Changes over Time

- 3.24 Total numbers of retail goods and service units in the town centre have declined since 1999 although there has been some fluctuation with reduced numbers of units identified in surveys over this period with the lowest number of units identified in 2008. Most of the reduction in units has been a loss of retail goods shops with retail services remaining broadly constant. Figures from the Regional Assessor identify only 7 vacant units but it is considered that this underestimates the number of vacant units. Vacancies have remained at about 15% of total numbers of units (the current Assessor figures suggest a vacancy rate of only 8%).
- 3.25 Total floorspace and turnover is identified to be significantly higher in 2013 when compared to 2004. However this reflects a redefinition of the town centre boundary with the inclusion of the Co-op supermarket on Bridge Road. If this is discounted the total turnover of the town centre is still identified to be 10% higher than in 2004 which is lower than the growth in available expenditure over this period. This indicates that, for all retail as a whole, Banff has lost a limited proportion of market share which reflects the additional new retail floorspace in towns such as Huntly and Buckie. However total turnover has increased in retail terms and this probably

reflects that Banff's catchment area is geographically limited and self-contained – with limited expenditure flows from Zone 7 to other towns i.e. the improvement in retail offer elsewhere has not drawn significant trade from Banff.

Catchment Area

3.26 The catchment area served by the town centre is, as noted above, quite limited. The market for convenience retail is confined primarily to Zone 7 with this Zone accounting for almost 90% of the turnover of convenience shops in the town centre, almost 80% of general comparison turnover and 66% of bulky goods turnover. For comparison goods a secondary catchment can be identified comprising Zone 6.

3.27 There have been slight changes since the survey undertaken in 2004. Since 2004 it appears that the catchment area for convenience goods has become confined to Zone 7 with minimal trade drawn from the rural areas to the south but, within Zone 7, market share has increased.

Town Centre Health Check

3.28 In overall terms Banff town centre exhibits generally weak indicators of vitality and viability. This includes the following:

- *Range of Retail offer:* the town centre provides almost all categories of retail units identified in Goad surveys but with limited choice.
- *Range of retail and non-retail services:* the town centre provides a range of retail services including restaurants, cafes, financial services, hair and beauty etc. and also a good range of other services although a couple of sectors are not represented in the centre (e.g. travel agents).
- *Shopper/household survey information:* for the town as a whole there is a low level of satisfaction with food shopping and for comparison goods shopping. In overall terms it is seen as a below average rating as an attractive place to shop.
- *Types of retail operator:* the town centre has a strong independent sector but there is a below average level of representation by national/regional multiples present (5 no. = 11% of retail goods shops).
- *Pedestrian flows:* these have been identified to be below average for Aberdeenshire towns in 2011 and also that flows have declined significantly over the past decade.
- *Vacancy rates:* Regional Assessor identifies 7 vacant units but surveys consistently identify 12-15 vacant units – these surveys indicate above Scottish average levels of vacancies and these have persisted since 1999.
- *Environment:* the town centre presents a mixed quality of environment with good quality of buildings, cleanliness and support for visitors but limited open space.

Review of Retail Sectors

3.29 Within the town as a whole representation in convenience sectors is as follows:

- Reasonable representation of independent specialist retailers.
- One convenience-format store.
- Two medium- format supermarkets (Co-op and Tesco respectively).
- No limited assortment discounter nor freezer-type shop.

3.30 As identified in the 2008 Review undertaken for Aberdeenshire Council most comparison units are less than 200 sq m GFA and those that are larger do not provide modern retail floorspace. Most categories of comparison goods retailing are present in the town centre although choice is limited.

Future Prospects

3.31 The primary catchment area of Banff (Zone 7) has been estimated to maintain a broadly constant population. As a result the market growth for convenience goods is forecast to grow only slowly in the long term (growth of 3% from 2013 to 2027) whereas comparison goods expenditure would be higher (+22% between 2013 and 2027). For convenience goods the proposed new Tesco supermarket is expected to increase expenditure retention and, subject to proposals for a new supermarket in Turriff, draw trade from surrounding smaller settlements and rural areas.

3.32 Long term changes to retailing would result in concentration of comparison goods retailing towards larger centres – including Aberdeen City Centre, Inverurie and Elgin.

3.33 As a result of these factors it is anticipated that, apart from growth associated with Tesco, there will be limited changes in retail provision in Banff town centre. Increased footfall associated with Tesco supermarket could create limited benefits for other non-convenience retailers in the town centre and retail services. There could also be some opportunities to develop a specialised tourist-type retail offer associated with the promotion of Banff as a tourist/day-tripper destination.

3.34 As a result of the Tesco proposal turnover in the centre is expected to increase by approximately 20% to £35m pa (this takes into account the positive effects of Tesco and trade diverted from town centre shops to the new store). Thereafter turnover is expected to remain broadly static in volume terms. However this will depend upon wider economic factors.

Key Retail Issues and Retail Deficiencies

3.35 For convenience goods no quantitative retail deficiency is identified for Banff. This reflects the proposed new large supermarket and the range of smaller convenience units in the town centre.

3.36 Key retail issues are identified to be:

- The lack of mid- and large-sized retail units in the town centre (for both comparison goods and also certain convenience sectors). It is unlikely that the retail market would support the development of new retail units of this size in Banff.

- Existing vacant premises/sites in the town centre could provide opportunities for new retail and service floorspace but it would appear that the current and prospective market would not support the development of these without significant public sector involvement and support. This reflects the limited size of the retail market, its limited growth and changes in the structure of retailing.
- The historic character of the town can be seen to present both opportunities and constraints – the latter being the limited size and poor configuration of older premises. However the town centre provides a distinctive character and is attractive to visitors.

Proposed Retail Strategy

3.37 The recommended Retail Strategy proposes:

- Identification of Banff centre as a **town centre** in the retail network.
- Policies to protect Banff town centre from adverse impact from retail proposals.
- No retail proposals for additional floorspace in either the town centre or elsewhere in or near Banff.

Summary and Conclusions

3.38 Despite its relatively small size the isolation of Banff has generally supported the retail sector and supported its resilience and turnover. This has been reflected in the proposals by Tesco for a new store which, although having taken a number of years to progress, are understood to be implemented in the near future. The town does, however, present difficulties and retail/retail service investment (apart from that proposed by Tesco) has been limited. The town centre has mixed, but generally weak, indicators of vitality and viability but has achieved modest turnover growth.

3.39 The recommended Retail Strategy continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. No proposals for additional retail floorspace are proposed apart from the Tesco supermarket which is identified as a retail “commitment”.

Figure 3.2: Banff



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods			All Goods				
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	46	3669	2334	4171	15.31	6450	4187	2622	10.98	2424	1576	1728	2.72	12543	8097	3583	29.01
Retail Services	31													3442			
Vacant	7													1145			
Total	84	3669	2334		£15.31m	6450	4187		£10.98m	2424	1576		£2.72m	17131	8097		£29.01m

Recent Changes							Vitality and Viability Summary			Retail Strategy Summary	
Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m	Strengths High diversity of town centre uses.	Weaknesses Low levels of satisfaction for all types of retail goods shopping. Below average rating for the overall attractiveness of the centre as a place to shop. Below average rating across all Aberdeenshire Centres in AC health check scores. Normally high vacancy rates (>15%). Limited range of retail offer, accessibility, commercial performance and vacancies.	Centre Classification Town Centre	Planning Policy Approach Protection	
1999	8	44	27	14	93	£20.72m £29.01m 40%					Summary: generally weak indicators of vitality and viability.
2004	9	35	31	14	89						
2006	8	35	33	13	89						
2008	8	28	29	12	77						
2013	9	36	31	7	84						

Ellon

3.40 Key data for retail provision in Ellon town centre is provided in Figure 3.3 provided at the end of this section.

Overview of Retail Provision

3.41 Retail provision within Ellon primarily comprises the town centre, a Tesco superstore located at Balmacassie and further with limited local provision outwith the centre.

Ellon Town Centre

- The town centre comprises 83 retail and retail service units – 7 convenience, 31 comparison, 36 retail services and 2 vacant units.
 - The total retail goods and services floorspace is 12,737 sq m of which 14% is convenience goods, 23% general comparison, 14% bulky goods, 32% retail services and 17% vacant.
 - Retail goods turnover is estimated to be £12.13m (2011 prices) with 39% from convenience goods, 45% from general comparison and 15% from bulky goods.
 - There is no key anchor in the town centre. The centre comprises mostly independent traders with a limited number of multiples.
- 3.42 Planning permission has been granted for an Aldi supermarket (limited assortment discounter) which would be within the town centre as defined in the LDP. This store would be 1650 sq m GFA and would represent a significant increase in total retail floorspace in the town centre when implemented. Turnover in 2017 with the Aldi, would increase to £16.4m (growth of 35%) but this would still be significantly less than that identified in 2004.
- 3.43 Outwith the town centre is the Tesco superstore at Balmacassie. This store has 4737 sq m GFA and has a turnover estimated to be £34m – i.e. more than double the turnover of the town centre even with Aldi trading.

Changes over Time

- 3.44 Total numbers of retail goods and service units in the town centre have remained broadly constant since 1999 although there has been some fluctuation with reduced numbers of units identified in surveys in 2004 and 2008. Over this period there has been a slight increase in numbers of retail service units. Vacancies have remained at a low level (between 2 and 4 units) which is a vacancy rate of 3% by number of units. In the most recent Regional Assessor data vacant floorspace was identified to be high (17%) but this reflects the Haldane unit – when the Aldi stores opens for trading the vacancy rate by floor area will be less than 2%.
- 3.45 Total floorspace and turnover is identified to be significantly lower in 2013 when compared to 2004. This reflects the effect of the closure of the Haldane store (trading in 2004 as Somerfield). When the Aldi trade is taken into account the turnover in the centre would be higher but would still be significantly less than that identified in 2004 – a reduction of approximately 30%. This reflects two key factors – first that Aldi, as a limited assortment discounter would trade at a lower density than the general purpose supermarket operated

by Somerfield and also the on-going impacts from Tesco at Balmacassie which would have resulted in the diversion of some trade from town centre shops.

Catchment Area

- 3.46 The primary catchment area for shops in Ellon, including Tesco, for each retail goods category comprises Zone 14. There is also a significant secondary catchment area comprising rural areas further afield – including Zones 8, 12 and 14 and also, for convenience goods, Zone 11. The significance of the catchment areas to the north and south reflects the relatively easy access to Balmacassie for those travelling along the A90.
- 3.47 Market penetration rates within the catchment areas are high for convenience goods within the primary catchment area (in excess of 70%) but relatively low for all comparison goods (typically in the range of 10-25% of expenditure).
- 3.48 There have been slight changes since the survey undertaken in 2004. Since 2004 it appears that the catchment area for all goods has extended further into rural areas to the north and south of Ellon. This reflects the wider trade draw of the Tesco store rather than shops within the town centre.

Town Centre Health Check

- 3.49 In overall terms Ellon town centre exhibits mixed indicators of vitality and viability. This includes the following:
- *Range of Retail offer:* the town centre provides almost all categories of retail units identified in Goad surveys but with limited choice.
 - *Range of retail and non-retail services:* the town centre provides a range of retail services including restaurants, cafes, financial services, hair and beauty etc. and also a good range of other services with few sectors not represented in the centre. A reasonable range of non-retail services and facilities are provided.
 - *Shopper/household survey information:* for the town as a whole there is a low level of satisfaction with the range of comparison goods shopping and average levels for food shopping. This survey pre-dated the opening of Aldi.
 - *Types of retail operator:* the town centre has a strong independent sector but there is a below average level of representation by national/regional multiples present (4 which equals 11% of retail goods shops).
 - *Pedestrian flows:* these have been identified to be significantly below average for Aberdeenshire towns in 2011 (the lowest of all towns surveyed) but that these had increased over the past decade.
 - *Vacancy rates:* Regional Assessor identifies 3 vacant units but one of these is due to be redeveloped for a new store. Taking this into account the vacancy rates (numbers of units and floorspace) are well below average for Scottish towns and have remained so for the past 15 years.
 - *Environment:* the town centre presents a generally good quality of environment although in parts pedestrian amenity is adversely affected by through-traffic.

Review of Retail Sectors

3.50 Within the town as a whole representation in convenience sectors is as follows:

- Reasonable representation of independent specialist retailers.
- Convenience-format stores.
- No mid-sized supermarkets nor freezer-type shop. However a Limited Assortment Discounter is due to open in the near future.
- The Tesco at Balmacassie provides a superstore catering for main food shopping requirements.

3.51 As identified in the 2008 Review undertaken for Aberdeenshire Council most comparison units are less than 200 sq m GFA and those that are larger do not provide modern retail floorspace. Most categories of comparison goods retailing are present in the town centre although choice is limited.

Future Prospects

3.52 Ellon's primary catchment area (Zone 13) and a significant proportion of the secondary catchment area (notably Zones 11 and 14) are included within major growth corridors. As a result the population within both the primary and secondary catchment areas is expected to grow significantly as is the overall retail market served by shops in the town. The market for convenience goods is forecast to grow in the long term (growth of 10-20% from 2013 to 2027) and comparison goods expenditure would be higher (30-40% between 2013 and 2027).

3.53 As with other small-medium town centres long term changes to retailing would result in concentration of comparison goods retailing towards larger centres – including Aberdeen City Centre and Inverurie. However the location of the town adjacent to the A90 would indicate significant market potential for large-format retail units in the medium – long term.

3.54 Although there is significant market potential it should also be noted that Ellon has competition from large town centres/retail locations at Inverurie and Peterhead and also that the town has relatively straightforward access to retail locations in Aberdeen. This competition will constrain the potential for growth of retail in the town.

3.55 If the town is able to maintain market share then it is anticipated that the town has the potential to benefit from significant retail turnover growth. This reflects the potential strengths of the town including: a catchment that would be sufficient to attract a range of multiples; strong growth in available expenditure for retailing; significant local demand for provision of local retail services and goods serving local market. However the weaknesses are that there is a lack of large retail floorplates in the town centre that would attract national/regional multiples and rents/ yields would not generate viability for new retail units in the town centre.

Key Retail Issues and Retail Deficiencies

3.56 For convenience goods no significant quantitative retail deficiency is identified for Ellon. This reflects the proposed new large supermarket and the range of smaller convenience units in the town centre.

- 3.57 There is a lack of mid- and large-sized retail units in the town centre (for both comparison goods and also certain convenience sectors). It is unlikely that the retail market would support the development of new retail units of this size in Ellon town centre in the foreseeable future. However there is potential for the market to support larger floorplate units (for example in the retail park) located within easy access of the A90.
- 3.58 High levels of expenditure leakage for comparison goods which, in the absence of new floorspace coming forward, will increase significantly in future years due to rapid growth of available expenditure. This is identified as a significant quantitative and qualitative retail deficiency for Ellon in serving its growing market.

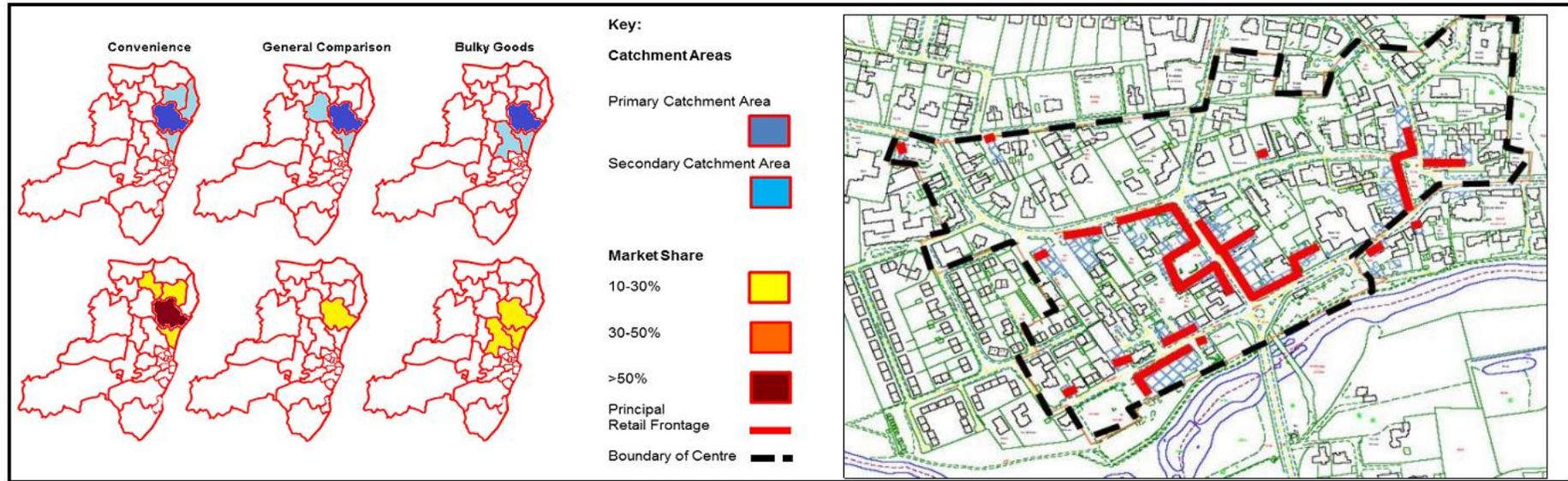
Proposed Retail Strategy

- 3.59 The recommended Retail Strategy proposes:
- Identification of Ellon centre as a **town centre** in the retail network.
 - Policies to protect Ellon town centre from adverse impact from retail proposals.
 - Identification of significant additional retail floorspace – 10,000 sq m GFA mixed comparison retail. Location not identified.
 - Tesco is *not* identified as a commercial centre in the network of centres.

Summary and Conclusions

- 3.60 Ellon town centre has, despite the closure of the Haldane supermarket and the opening of Tesco, largely retained its mix of small and independent retailers within the town centre. The proposed new Aldi foodstore in the town centre will benefit the centre. Despite this the principal retail location, in terms of turnover, is the Tesco store at Balmacassie. Both this store and the town centre serve an area of strong growth. The existing level of provision, particularly for comparison goods, is limited and, as a result of this, expenditure leakage in these sectors is high.
- 3.61 The recommended Retail Strategy therefore continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. Furthermore significant new mixed comparison floorspace is identified to address a quantitative retail deficiency for both general comparison and bulky goods.

Figure 3.3: Ellon



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	45	1840	1196	2595	4.77	2876	1869	2932	5.48	1778	1156	1623	1.88	6493	4221	2874	12.13
Retail Services	36													4049			
Vacant	2													2194			
Total	83	1840	1196		£4.77m	2876	1869		£5.48m	1778	1156		£1.88m	12737	4221		£12.13m

Year	Recent Changes					Retail Goods Turnover £m	Vitality and Viability Summary	Retail Strategy Summary	
	Conv	Comp	No. of Units Ret Services	Vacant	Total			Centre Classification	Town Centre
1999	6	30	34	2	72		Strengths Above average rating in AC health check. Strong independent sector but limited multiples. Strengths: Low vacancy rates (<5%); clean appearance/well maintained Weaknesses Low levels of satisfaction for comparison goods shopping provision and average levels for each of food shopping, accessibility and in Weaknesses: Low levels of footfall; limited investment (prior to Aldi); limited diversity of uses. Others Summary: on balance relatively strong indicators of vitality and viability although it does have weaknesses.	Centre Classification	Town Centre
2004	7	24	33	3	67	£21.84m		Planning Policy Approach	Protection and promotion of significant new retail floorspace in out-of-centre location
2006	6	26	31	2	65			Proposed Retail Floorspace Commitments	
2008	7	26	38	4	75				
2013	7	31	36	2	76	£12.13m -44%			Proposals

Fraserburgh

3.62 Key data for retail provision in Fraserburgh town centre is provided in Figure 3.4 provided at the end of this section.

Overview of Retail Provision

3.63 Retail provision within Fraserburgh primarily comprises the town centre, a limited number of large format retail units at Maconachie Road and the new Asda store at Watermill Road is due to commence trading in the latter half of 2013.

Fraserburgh Town Centre

- The town centre comprises 164 retail and retail service units – 19 convenience, 58 comparison, 64 retail services and 23 vacant units.
- The total retail goods and services floorspace is 25,432 sq m of which 13% is convenience goods, 36% general comparison, 14% bulky goods, 30% retail services and 7% vacant (this figure for vacancies provided by the Regional Assessor is considered to be a significant underestimate).
- Retail goods turnover is estimated to be £33.00m (2011 prices) with 20% from convenience goods, 64% from general comparison and 15% from bulky goods.
- There is no key anchor in the town centre. The centre comprises mostly independent traders with a limited number of multiples.

Maconachie Road Area

3.64 There are four large format units located at Maconachie Road – Tesco, Lidl, Acorn and Argos. Tesco is a standalone unit whereas the other three form a single development located adjacent to Tesco. In total these provide 8897 sq m GFA retail floorspace and total estimated turnover of approximately £53m – that is the retail floorspace of these four units is approximately 55% that of the town centre but the turnover is over 50% *greater* than the town centre.

Asda, Watermill Road

3.65 This store is under construction in 2013. The store is 4610 sq m GFA and is estimated to have a turnover in 2017 of approximately £21m.

3.66 In 2017 the retail model estimates that the turnover of the town centre will only be 30% of the total retail turnover of all shops in Fraserburgh.

Changes over Time

3.67 Total numbers of retail goods and service units in the town centre have declined slightly since 1999 (from 175 to 169 units). Over this period there has been a significant increase in numbers of retail service units and a decline in trading retail goods shops – from 108 identified in 1999 to 77 in 2013. Total trading floorspace of

retail goods shops in the town centre has declined by 17.5% between 2004 and 2013 (Regional Assessor figures). Vacancies have remained at a high level (between 16 and 23 units) during this period with a current vacancy rate of 14% by number of units. In the most recent Regional Assessor data vacant floorspace was identified to be 7% but it is considered that this significantly underestimates actual vacancies in the town centre (the Regional Assessor only identifies 9 vacant units compared to 23 observed in survey).

- 3.68 Reflecting the decline in retail goods floorspace turnover is identified to be significantly lower in 2013 when compared to 2004 (a decline of approximately 27%). This reflects the effect the closure of a number of retail units in the town centre.
- 3.69 In contrast the turnover of all shops in the town of Fraserburgh has remained almost constant over the period 2004 – 2013 (an actual increase of less than 1% in constant prices). There has, therefore, been a substantial shift in retail activity from the town centre to out of centre locations – primarily Maconachie Road.

Catchment Area

- 3.70 The primary catchment area for shops in Fraserburgh, including the Maconachie Road, comprises Zone 10 for all types of retail goods. The secondary catchment area is relatively limited for convenience goods confined to Zone 12 whereas the secondary catchment for general comparison and bulky goods is more extensive comprising Zones 7, 11 and 12.
- 3.71 Market penetration rates within the primary catchment area for convenience goods are very high (85% of expenditure is directed to shops in Fraserburgh). For comparison goods market penetration rates are lower in the primary catchment area (in the range of 30-40%) and low in the secondary catchment area (less than 15%).
- 3.72 The catchment areas for shops in the town have remained broadly similar since 2004. There has been a slight contraction in terms of the convenience catchment area (primarily reflecting the impact of competition from shops in Huntly reducing trade draw from the west) but, if anything, a slight widening of the trade draw for comparison goods. The reasons for this are not readily apparent.

Town Centre Health Check

- 3.73 In overall terms Fraserburgh town centre exhibits weak indicators of vitality and viability. This includes the following:
- *Range of Retail offer:* the town centre provides a reasonably broad range of retail categories and, in certain sectors, some choice for consumers. However there are no major stores such as variety/department stores that might otherwise be expected in a town centre of this size.
 - *Range of retail and non-retail services:* the town centre provides a range of retail services including restaurants, cafes, financial services, hair and beauty etc. and also a good range of other services with few sectors not represented in the centre. A reasonable range of non-retail services and facilities are also provided.
 - *Shopper/household survey information:* for the town as a whole there is a low level of satisfaction with Fraserburgh town centre as a place to shop.

- *Types of retail operator:* the town centre has a mix of both independent retailers and multiples. In total 10 national multiples are currently present in the town centre (13% by number) which is below average for this size of centre in Scotland.
- *Pedestrian flows:* these have been identified to be above average for Aberdeenshire towns in 2011 but that these have declined over the past decade (decline of 14% observed since 2003).
- *Vacancy rates:* Surveys identified 23 vacant retail and retail service units in early 2013 – this is 14% vacant by number of units. Regional Assessor identifies 7% of floorspace to be vacant although it is considered that this is a significant underestimate of vacancies which are probably closer to double this level. Vacancies are therefore above average for towns in Scotland at the current time (and well above average for Aberdeenshire town centres).
- *Environment:* the town centre presents a mixed quality of environment. In central parts pedestrian amenity is high due to traffic calming and pedestrianisation whereas vacant buildings and poor maintenance in areas detracts from the appearance of the centre.

Review of Retail Sectors

3.74 Within the town as a whole representation in convenience sectors is as follows:

- Reasonable representation of independent specialist retailers.
- Lack of supermarkets located in the town centre but currently two stores located outwith the town centre (Tesco and Lidl) with a third (Asda) due to open soon. Therefore the out-of-centre provision caters for most convenience sectors.

3.75 As with other town centres in Aberdeenshire most units are small (less than 200 sq m) although there are a significant number of larger units (19 units greater than 200 sq m GFA). However there is a lack of modern retail space within the town centre suitable for modern retail requirements.

Future Prospects

3.76 Fraserburgh's primary catchment area (Zone 10) is identified to experience modest population growth between 2013 and 2027. As a result available expenditure for convenience goods is identified to grow by up to 10% to 2027 and for comparison goods this is expected to grow by up to 30%.

3.77 However two key factors will limit the growth of convenience retailing:

- The opening of the new Asda store at Watermill Road will more than account for growth in available expenditure and will divert trade from existing town centre shops as well as Tesco and Lidl.
- New supermarkets proposed in both Banff and Turiff will increase competition for trade from those living to the west of Fraserburgh – an area which, up until now has been a significant source of trade for town centre shops and the supermarkets.

- 3.78 As a result of these factors, despite market growth, town centre convenience turnover will be lower in 2017 compared to 2013 and is expected to remain below current levels even up to 2027.
- 3.79 As with other small-medium town centres long term changes to retailing would result in concentration of comparison goods retailing towards larger centres – including Aberdeen City Centre, Inverurie and Elgin. If one considers only the north eastern part of the study area whereas total retail sales in Fraserburgh (town centre and out of centre combined) have remained constant since 2004 the total retail turnover of Peterhead has grown by 50%. This *could* imply a market preference for serving this market area through concentration in Peterhead rather than Fraserburgh.
- 3.80 From the above it is evident that there are a number of factors that indicate that retailing in Fraserburgh town centre will continue to be difficult. This reflects a combination of both national trends in retailing and also a combination of additional competing retail proposals – both within Fraserburgh (out of centre) and in other towns in north Aberdeenshire.

Key Retail Issues and Retail Deficiencies

- 3.81 For convenience goods no significant quantitative retail deficiency is identified for Fraserburgh. This reflects both existing provision and the new Asda supermarket.
- 3.82 For comparison goods it is recognised that there is a lack of modern retail premises suitable for multiples and similar operators within Fraserburgh town centre. It is also apparent that there is insufficient demand that would render redevelopment to create these units viable and this situation is unlikely to change in the foreseeable future. Furthermore, as noted, above, prospects for new retail growth in the town centre are poor.
- 3.83 Maconachie Road provides a clear concentration of retail activity within the town. This location does not provide the range of services and facilities that would support designation as a distinct town centre but its role in retail terms should be acknowledged.

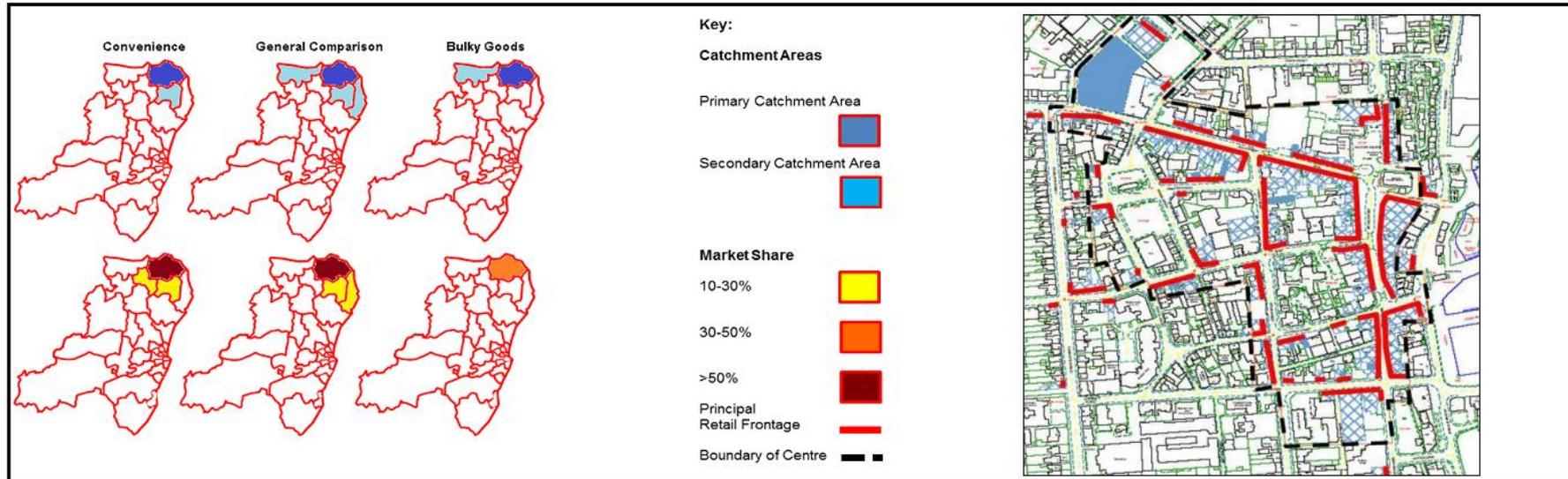
Proposed Retail Strategy

- 3.84 The recommended Retail Strategy proposes:
- Identification of Fraserburgh centre as a **town centre** in the retail network.
 - Policies to protect Fraserburgh town centre from adverse impact from retail proposals.
 - Identification of Maconachie Road (comprising Tesco, Lidl, Acorn and Argos) as a **Commercial Centre** in the network of centres.
 - No identification of specific proposals for additional retail floorspace within the town – apart from the existing Asda scheme which is identified as a retail “commitment”.
 - That there is clear recognition of the difficulties for future retailing in the town centre and the need to manage change in the centre.

Summary and Conclusions

- 3.85 Fraserburgh presents a number of serious issues for future retailing. The town centre has declined significantly in recent years and there is every expectation that this will continue in the future. As a whole retailing in Fraserburgh has remained broadly constant since 2004 but there has been a clear shift from the town centre to out-of-centre locations. National retail trends and commitments to additional retail space both in Fraserburgh (out-of-centre) and elsewhere will result in a continuation of this trend for the foreseeable future.
- 3.86 This presents a number of issues that will need to be addressed in terms of the vitality and viability of the centre and the need to manage future change.
- 3.87 The recommended Retail Strategy therefore continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. However it also recognises the reality of the situation at Maconachie Road which is proposed as a Commercial Centre within the network. No furthermore floorspace is identified for the town as part of the Retail Strategy.

Figure 3.4: Fraserburgh



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m
Retail Goods Shops	76	3314	2154	3135	6.75	9103	5917	3597	21.28	3661	2379	2088	4.97	16078	10451	3158	33.00
Retail Services	64													7535			
Vacant	23													1820			
Total	163	3314	2154		£6.75m	9103	5917		£21.28m	3661	2379		£4.97m	25432	10451		£33.00m

Recent Changes						Retail Goods Turnover £m		Vitality and Viability Summary		Retail Strategy Summary		
Year	Conv	Comp	No. of Units Ret Services	Vacant	Total			Strengths	Weaknesses	Centre Classification	Town Centre	
1999	25	83	47	20	175			Strong independent sector but limited multiples.	Below average rating in AC health check.	Centre Classification	Town Centre	
2004	19	73	39	21	152	£45.28m		Strengths: Diversity of uses in the town centre; pedestrian amenity is relatively high due to low impacts of traffic on pedestrians.	and average levels for food shopping. Relatively high levels of satisfaction for ease of access to the centre. Low levels of satisfaction for Fraserburgh town centre as an attractive place to	Planning Policy Approach	Maonachie Road area - Commercial Centre	
2006	20	66	56	16	158					Proposed Retail Floorspace	Protection and manage change	
2008	16	69	54	20	159	£33.00m				Commitments	Out of centre supermarket 4610 sq m GFA	
2013	19	58	64	23	164		-27%	Weaknesses: High levels of vacancies (14% by number in 2013); poor environmental quality; declining pedestrian flows.		Proposals	Note: catchment area identified above reflects catchment of out of centre existing superstore and other floorspace as well as the town centre.	
								Others				
								Summary: on balance relatively weak indicators of vitality and viability.				

Huntly

3.88 Key data for retail provision in Huntly town centre is provided in Figure 3.5 provided at the end of this section.

Overview of Retail Provision

3.89 Retail provision within Huntly comprises the town centre together with two supermarkets (Asda and Tesco) located in the southern and western parts of the town.

Huntly Town Centre

- The town centre comprises 75 retail and retail service units – 10 convenience, 37 comparison, 22 retail services and 6 vacant units (Regional Assessor data).
- The total retail goods and services floorspace is 12,180 sq m of which 15% is convenience goods, 29% general comparison, 28% bulky goods, 21% retail services and 6% vacant.
- Retail goods turnover is estimated to be £12438m (2011 prices) with 18% from convenience goods, 57% from general comparison and 26% from bulky goods.
- There is no key anchor in the town centre. The centre comprises mostly independent traders with a limited number of multiples. The Co-op is the largest store within the town centre but this is located separate from the principal retail locations at Gordon Street, Duke Street and The Square.

Out-of-Centre Floorspace

3.90 Outwith the town centre are two large supermarkets operated by Asda and Tesco:

- Asda, Steven Road. 3817 sq m GFA and estimated turnover of £14.3m
- Tesco, Deveron Road. 3726 sq m GFA and £15.2m turnover.

Changes over Time

3.91 Total numbers of retail goods and service units in the town centre have declined since 1999 – with decline being most marked since 2006. However, unlike other centres the decline has affected both retail goods shops and retail service units. According to Regional Assessor data there are currently only 6 vacant units but this is likely to be an underestimate. Survey data for 2004-2008 identifies between 9 and 11 vacant units and the most recent Aberdeenshire Town Centre Health Check identifies a doubling of vacancies since 2009. This historic level of vacancies is 12% by number of units which is slightly above average for Scottish towns (and significantly above average for Aberdeenshire towns). Using Regional Assessor data for floorspace the vacancy rate is 6% but this is also expected to be an underestimate.

3.92 Retail turnover is identified to be 38% lower in 2013 when compared to 2004 (in constant price terms). This reflects the impact that the two superstores have had on town centre trade (in particular on the Co-op store which was previously operated by Somerfield). However if one considers the town as a *whole* (i.e. including Asda and Tesco) turnover has more than doubled since 2004 indicating the effect of the two modern

supermarkets on overall trade. Therefore, for the town as a whole there has been a substantial increase in retail trade but there has also been a transfer of retail trade from the town centre to out of centre locations.

Catchment Area

- 3.93 The primary catchment area for shops in Huntly, including Asda & Tesco, for all retail goods categories comprises Zone 4+5. There is also a significant secondary catchment area comprising rural areas further afield – including Zones 2, 6 and 7 for each retail goods category. The significance of the catchment areas to the north and south reflects the current lack of major supermarket provision in Banff and Turiff. This will change with the development of proposed new stores in Banff and Turiff.
- 3.94 Market penetration rates within the catchment areas are high for convenience goods within the primary catchment area (approximately 65%) but lower in the secondary catchment zones (10%-25%). For comparison goods penetration rates are relatively low (typically in the range of 5-15% of expenditure).
- 3.95 There have been significant changes since the survey undertaken in 2004 reflecting the impact of the two supermarkets on drawing trade from the north and south.

Town Centre Health Check

- 3.96 In overall terms Huntly town centre exhibits mixed indicators of vitality and viability:
- *Range of retail offer:* the town centre is relatively small with a limited retail offer – most Goad categories are present but there is limited choice for consumers.
 - *Range of retail and non-retail services:* the town centre provides a range of retail services including restaurants, cafes, financial services, hair and beauty etc. and also a good range of other services with few sectors not represented in the centre. A reasonable range of non-retail services and facilities are provided.
 - *Shopper/household survey information:* for the town as a whole there is a high level of satisfaction with the range of convenience goods shopping (reflecting the presence of three supermarkets) but low satisfaction for comparison goods shopping. There are high levels of satisfaction with accessibility to the centre and, in overall terms, average levels of satisfaction as a place to shop.
 - *Types of retail operator:* the town centre has a strong independent sector but few national or regional multiples.
 - *Pedestrian flows:* these have been identified to be below average for Aberdeenshire towns in 2011 and that these were slightly lower than previous years.
 - *Vacancy rates:* Vacancy rates are identified to be slightly above Scottish average and significantly higher than the average for Aberdeenshire town centres. The reported recent increase in vacancies could be indicative of increasing vulnerability to adverse retail impact.
 - *Environment:* the town centre presents a high quality of environment although in parts pedestrian amenity is adversely affected by through-traffic.

Review of Retail Sectors

3.97 Within the town as a whole representation in convenience sectors is as follows:

- Good representation of independent specialist retailers (reflecting the small size of town).
- One convenience-format store.
- One mid-sized supermarket plus two large out-of-centre supermarkets. No discounter.
- The Asda and Tesco stores serve main food shopping requirements.

3.98 As identified in the 2008 Review undertaken for Aberdeenshire Council most comparison units are less than 200 sq m GFA and those that are larger do not provide modern retail floorspace. Most categories of comparison goods retailing are present in the town centre although choice is limited.

Future Prospects

3.99 Huntly's primary catchment area (Zone 4+5) and its secondary catchment area are not included within major growth corridors. As a result the population within both the primary and secondary catchment areas is identified to remain broadly static over the period covered in this study. As a result the market growth for convenience goods is forecast to grow only modestly in the long term (growth of 5-10% from 2013 to 2027) but comparison goods expenditure growth would be higher (20-25% between 2013 and 2027).

3.100 As with other small-medium town centres long term changes to retailing would result in concentration of comparison goods retailing towards larger centres – including Aberdeen City Centre, Inverurie and Elgin.

3.101 Although there is significant market potential Huntly has competition from large town centres/retail locations at Inverurie and Elgin and it would also be affected by competition from new supermarket floorspace proposed for Banff and Turriff which would reduce the trade drawn from Zones 6 and 7. This would be most likely to affect the three supermarkets – especially the Asda and Tesco stores that serve main food shopping requirements.

Key Retail Issues and Retail Deficiencies

3.102 A key issue for Huntly is the limited size of the retail market served by the town. In recent years this was overcome by the provision of new floorspace effectively extending the catchment area served by the town. However this is a temporary situation and, as a result of new/recent floorspace in each of Keith, Banff and Huntly, these will all reduce the relative attractiveness of the Tesco and Asda stores. This will restrict the ability of shops in the town to draw trade from beyond Zone 4+5.

3.103 For convenience goods no significant quantitative retail deficiency is identified for Huntly. This reflects the existing supermarkets and existing independent specialist convenience goods shops already present in the town together with the effect of new floorspace in competing towns drawing trade from the existing secondary catchment areas of the towns' shops. In qualitative terms there is a lack of discounters and freezer-centres but it is uncertain that the market would support the provision of this type of floorspace in the foreseeable future.

3.104 There is a lack of mid- and large-sized retail units in the town centre (for both comparison goods and also certain convenience sectors). It is unlikely that the retail market would support the development of new retail units of this size in Huntly in the foreseeable future. As a result the existing high levels of expenditure leakage for comparison goods will increase significantly in future years due to steady growth of available expenditure.

3.105 Within the town centre there is a significant opportunity to take further advantage of the high quality of the town centre's conservation and heritage supporting specialist small-scale retail units serving the tourist and day-tripper trade. However this will only support relatively modest levels of new floorspace.

Proposed Retail Strategy

3.106 The recommended Retail Strategy proposes:

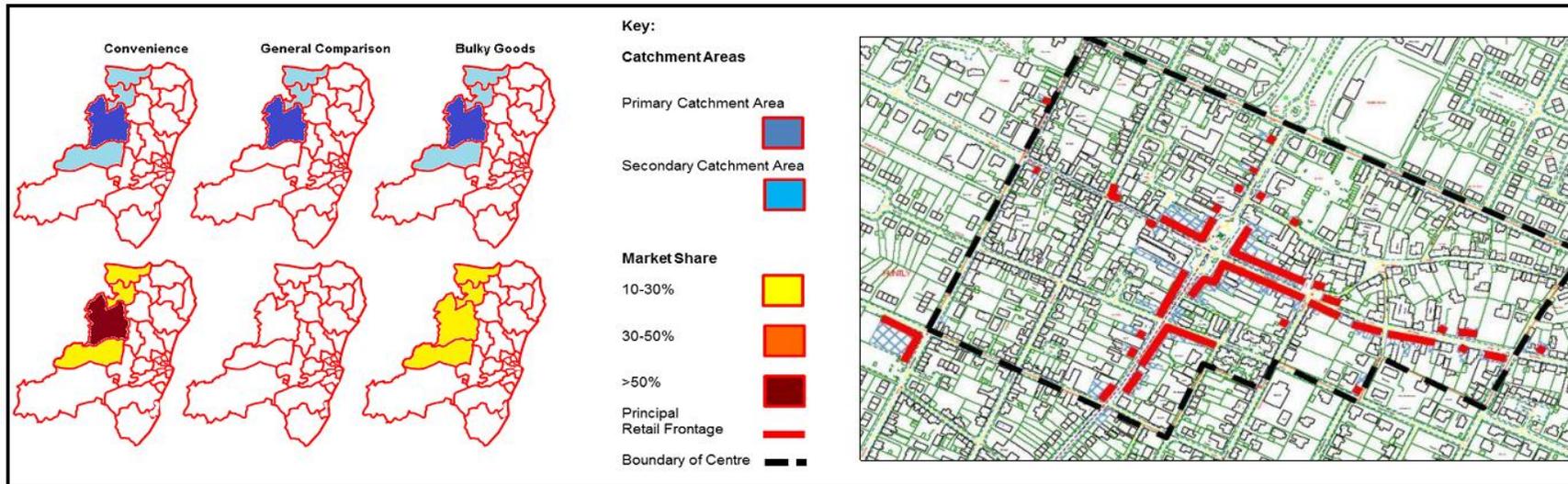
- Identification of Huntly as a **town centre** in the retail network.
- Policies to protect Huntly town centre from adverse impact from retail proposals.
- No identification of significant additional retail floorspace in Huntly.
- Neither the Asda nor Tesco stores are identified as commercial centres in the network of centres.

Summary and Conclusions

3.107 Huntly town centre has been affected by the opening of two supermarkets on the edge of the town. As a whole these have increased trade draw to the town from surrounding areas but this position is not expected to continue as a result of recent developments in Keith and proposed stores in Banff, Turiff and Inverurie. Market concentration trends will also reduce Huntly's market share. As a result there are indications of a deterioration of the vitality and viability of the town centre and slow growth in the market served by the town is unlikely to reverse this. However the town centre is very attractive and there is significant potential to increase the role of Huntly as a specialist retail centre catering for the tourist/day tripper trade.

3.108 The recommended Retail Strategy therefore continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. No additional floorspace is proposed within the centre or elsewhere in the town.

Figure 3.5: Huntly



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m
Retail Goods Shops	47	1871	1216	1165	2.18	3588	2332	3019	7.04	3453	2244	1432	3.21	8911	5792	2146	12.43
Retail Services	22													2528			
Vacant	6													741			
Total	75	1871	1216		£2.18m	3588	2332		£7.04m	3453	2244		£3.21m	12180	5792		£12.43m

Recent Changes						Vitality and Viability Summary		Retail Strategy Summary			
Year	Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m					
2004	14	38	25	9	86	£20.14m	<p>Strengths Strong independent sector but limited multiples. Strengths: Overall cleanliness of centre; tourism infrastructure; historic character of centre.</p> <p>Weaknesses Below average rating in AC health check. Low levels of satisfaction for comparison goods shopping provision but high levels for food shopping (this really reflects the role of supermarkets outwith the town centre). High levels of satisfaction for ease of access to the centre. Average levels of satisfaction for Huntly town centre as an attractive place to shop. High vacancies (AC health check notes a doubling of vacancies since 2009); adverse impact of traffic on amenity.</p> <p>Summary: on balance mixed indicators of vitality and viability but changes in vacancies since 2009 suggest increasing vulnerability in terms of viability.</p>	Centre Classification		Town Centre	
2006	14	37	25	11	87			Planning Policy Approach		Protection	
2008	13	32	26	10	81			Proposed Retail Floorspace			
2013	10	37	22	6	75	£12.43m		Commitments			
						-38%	Proposals				

Inverurie

3.109 Key data for retail provision in Inverurie town centre is provided in Figure 3.6 provided at the end of this section.

Overview of Retail Provision

3.110 Retail provision within Inverurie primarily comprises the town centre together with a Morrisons supermarket located outwith the town centre.

Inverurie Town Centre

- The town centre comprises 129 retail and retail service units – 13 convenience, 62 comparison, 50 retail services and 5 vacant units.
- The total retail goods and services floorspace is 40,042 sq m of which 23% is convenience goods, 42% general comparison, 19% bulky goods, 17% retail services – Regional Assessor data does not provide vacant floorspace information for the town centre.
- Retail goods turnover is estimated to be £120.5m (2011 prices) with 46% from convenience goods, 45% from general comparison and 9% from bulky goods.
- The Tesco store is a major store and accounts for 20% of the total floorspace (7888 sq m GFA) and 42% of the retail turnover of the town centre (£44m). However, despite its large size, given the location of this store at the northern end of the town centre and the size of the remainder of the centre it is not considered that this performs an anchor role for the remainder of the town centre.

Other Retail Floorspace

3.111 Outwith the town centre the principal retail unit is the Morrison's supermarket. This is half the size of the Tesco superstore with 3469 sq m GFA and £17m turnover.

Retail Proposals

3.112 At the present time there are two approved planning applications for additional retail floorspace – both proposed to be located at Harlaw Road. These include a new superstore (6000 sq m GFA) and an Aldi discount foodstore (1567 sq m GFA). These are treated as retail “commitments”. They would be located to the north of the existing town centre.

Changes over Time

3.113 Total numbers of retail goods and service units in the town centre have increased since 1999. The principal reason for this has been the development of the Inverurie Retail Park within the defined town centre. The town centre has grown by 11% in numbers of retail units, 37.5% in total retail and retail service floorspace and 54% retail goods turnover. Growth has been particularly strong for comparison goods with turnover more than doubling over this period. Since 2004 Inverurie town centre turnover has grown substantially faster than any

other centre in Aberdeenshire – it now has the highest turnover of any retail location by a considerable margin.

Catchment Area

3.114 The primary and secondary catchment areas for Inverurie town centre are extensive. The primary catchment area comprises both zones 15 and 16 and the secondary catchment extends to the north for convenience goods but to both the north and west for comparison goods. The catchment area for the town is considerably wider than for any other centre apart from the City Centre.

3.115 Market penetration rates within the catchment areas are very high for convenience goods within the primary catchment area (in excess of 75%) and still significant in the secondary catchment area (10-25%). Market share for comparison goods is lower but still significant – in the region of 10-25% for general comparison goods and 10-20% for bulky goods.

3.116 There have been significant changes in the market areas served since 2004:

- For convenience goods the catchment areas and market penetration have *reduced* in extent – this reflects the new supermarkets developed in towns such as Huntly, Westhill, Banchory and Ellon.
- For comparison goods the catchment areas and market penetration have *increased* – this reflects the increases in comparison goods provision in the town centre relative to other town centres.

3.117 These changes demonstrate a changing role for Inverurie town centre reflecting that the centre has, unlike other town centres in Aberdeenshire, developed a sub-regional role for comparison goods retailing serving more than the town's immediate hinterland.

Town Centre Health Check

3.118 In overall terms Inverurie town centre exhibits strong indicators of vitality and viability: This includes the following:

- *Range of Retail offer:* the town centre provides a wide retail offer with almost all categories of retail units identified in Goad surveys and, in many, providing significant retail choice.
- *Range of retail and non-retail services:* the town centre provides a wide range of retail services including restaurants, cafes, financial services, hair and beauty etc. and also a good range of other services with few sectors not represented in the centre. A good range of non-retail services and facilities are provided.
- *Shopper/household survey information:* for the town centre there is a high level of satisfaction for all types of retail shopping and for ease of access to the centre. There is a high level of satisfaction with Inverurie as a place to shop.
- *Types of retail operator:* the town centre has a strong independent sector and a good range of multiples. In 2013 15 multiples were identified out of a total of 74 retail goods shops – that is 20%.

- *Pedestrian flows:* these have been identified to be slightly *below* average for Aberdeenshire towns in 2011. In 2011 flows were identified to be higher than either 2005 and 2007 but lower than 2003.
- *Vacancy rates:* In 2013 5 units were identified as vacant which is 4% by number of units. No information is provided from the Regional Assessor on the vacant floorspace but this is estimated to be in approximately 2-3%. These are low vacancy rates well below the Scottish average.
- *Environment:* the town centre presents a generally good quality of environment although in parts pedestrian amenity is adversely affected by through-traffic and there is relatively poor physical integration between parts of the town centre (notably Tesco and also the retail park) with the remainder of the town centre for pedestrians.

Review of Retail Sectors

3.119 Within the town as a whole representation in convenience sectors is as follows:

- Reasonable representation of independent specialist retailers.
- Convenience-format stores.
- No mid-sized supermarkets but there is also one existing (and one proposed) discounter and a freezer-centre.
- The Tesco provides a major main food supermarket within the town centre and the Morrisons also serves this market in a location outwith the town centre.

3.120 There are also proposals for a second superstore at Harlaw Road and a second discount foodstore.

3.121 For comparison goods shops Inverurie provides a range of both traditional and modern retail units of various sizes. These are suitable for both independent retailers and multiples. The average size of units in Inverurie is significantly larger than in any other town centre (excluding Portlethen District Centre).

Future Prospects

3.122 Inverurie's primary catchment area and much of the secondary catchment area is included within major growth corridors. As a result the population within both the primary and secondary catchment areas is expected to grow significantly as is the overall retail market served by shops in the town. As a result the market growth for convenience goods is forecast to grow in the long term (growth of 10% from 2013 to 2027) and comparison goods expenditure would be higher (30% between 2013 and 2027).

3.123 The scale of investment in retail in Inverurie over the past decade indicates that the town centre is of a size to generate significant market interest. As a result it is considered that the combination of size and mix of units, market growth, existing scale of provision and proximity to major transport corridors is likely to result in continued market interest for significant new retail floorspace in the long term.

3.124 As a result of the above it is anticipated that retail turnover within the town centre and town will continue to grow significantly.

3.125 It should be noted that there are two proposals for new retail floorspace in Kintore (in total providing 2000 sq m GFA) – given the growth of the market this is unlikely to have a significant effect on retail provision within Inverurie. More significant for the town centre is the impact that would arise from the proposed new superstore and discount foodstore at Harlaw Road which will result in trade diversion from Tesco, Lidl and other convenience shops within the town centre. These stores will result in reduced turnover in the short term in the town centre but, reflecting the growth of the market, turnover will recover back to current levels by 2022.

Key Retail Issues and Retail Deficiencies

3.126 For convenience goods no significant quantitative retail deficiency is identified for Inverurie – this reflects existing proposals for new convenience floorspace within Inverurie and Kintore.

3.127 For comparison goods key factors are: the large existing market; strong market growth; limited competition from other retail locations; and potentially favourable market considerations. Each of these support the identification of additional floorspace for comparison goods within the proposed retail strategy.

Proposed Retail Strategy

3.128 The recommended Retail Strategy proposes:

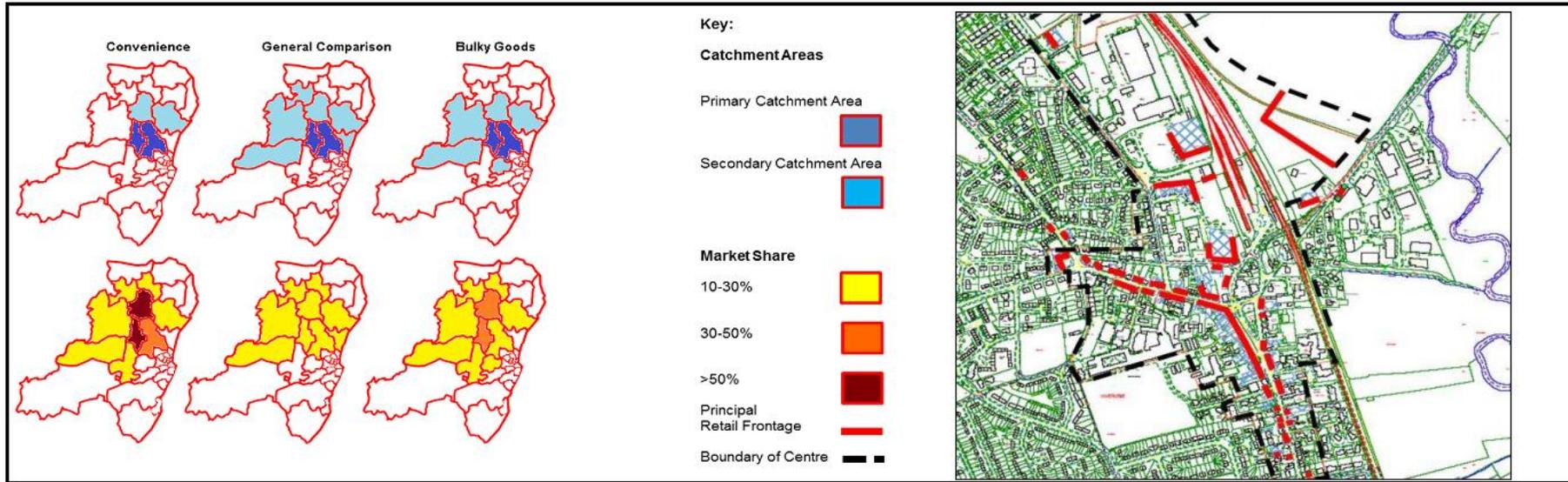
- Identification of Inverurie centre as a **town centre** in the retail network.
- Policies to protect Inverurie town centre from adverse impact from retail proposals.
- Identification of significant additional retail floorspace – 5,000 sq m GFA mixed comparison retail. Location not identified.
- Morrison's is *not* identified as a commercial centre in the retail network.

Summary and Conclusions

3.129 Inverurie town centre is a strong town centre which has benefitted from significant retail investment. Its role, particularly for comparison goods retailing has strengthened over the past decade with the result that, in retail terms, the centre has developed a sub-regional role.

3.130 The recommended Retail Strategy therefore continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. Furthermore significant new mixed comparison floorspace is identified for both general comparison and bulky goods in recognition of the future growth of the market area served by the town centre.

Figure 3.6: Inverurie



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m
Retail Goods Shops	74	9132	6115	6035	55.11	16864	11353	4804	54.55	7421	5125	2119	10.86	33416	22593	5334	120.52
Retail Services	50													6626			
Vacant	5													0			
Total	129	9132	6115		£55.11m	16864	11353		£54.55m	7421	5125		£10.86m	40042	22593		£120.52m

Recent Changes						Retail Goods Turnover £m		Vitality and Viability Summary		Retail Strategy Summary		
Year	Conv	Comp	No. of Units Ret Services	Vacant	Total					Centre Classification	Town Centre	
1999	15	61	36	4	116			Strengths		Planning Policy Approach	Protection and promotion of significant new retail floorspace	
2004	11	56	44	2	113	£78.27m		High to very high levels of satisfaction for all types of retail shopping. Generally high levels of satisfaction for ease of access to the centre. High levels of satisfaction for Inverurie town centre as an attractive place to shop.		Proposed Retail Floorspace		
2006	13	48	46	3	110			Strengths: Low vacancies (<4% by numbers of units in 2013); high multiple representation and good representation of independents. Above average rating in AC health check – ranked joint first of the centres surveyed.			Commitments	Harlaw Road superstore - 6000 sq m GFA Harlow Road discounter - 1567 sq m GFA
2008	12	58	37	6	113			Weaknesses			Proposals	5000 sq m GFA mixed comparison
2013	12	62	50	5	129	£120.52m	54%	Weaknesses: Adverse impacts of traffic on amenity and poor pedestrian accessibility within the centre.				
								Summary: overall strong indicators of vitality and viability.				

Peterhead

3.131 Key data for retail provision in Peterhead town centre is provided in Figure 3.7 provided at the end of this section.

Overview of Retail Provision

3.132 Retail provision within Peterhead primarily comprises the town centre together with a significant out-of-centre retail floorspace in a series of locations.

Peterhead Town Centre

- The town centre comprises 158 retail and retail service units – 14 convenience, 69 comparison, 60 retail services and 15 vacant units.
- The total retail goods and services floorspace is 27,889 sq m of which 13% is convenience goods, 41% general comparison, 11% bulky goods, 30% retail services and 6% vacant floorspace.
- Retail goods turnover is estimated to be £36.1m (2011 prices) with 25% from convenience goods, 65% from general comparison and 10% from bulky goods.
- Within the town centre there is no single major store. The largest individual units in the town centre are Iceland (convenience), Mackays (clothing) and Donalds (home and furniture). None of these acts as a major anchor store for the town centre.

Other Retail Floorspace

3.133 Significant retail floorspace is found in four out-of-centre locations in Peterhead:

- Windmill Road. There are three retail units comprising Lidl (convenience), Home Bargains (general comparison) and Halfords (bulky/general comparison) purpose built as retail warehouse units located on Windmill Road. In total these provide 4826 sq m GFA and an estimated retail turnover of £14.6m.
- Morrisons, Queen St. This superstore comprises 5514 sq m GFA and an estimated turnover of £32.4m pa.
- Asda, West Road. This supermarket is 3586 sq m GFA with an estimated turnover of £21.3m. Planning permission has been granted for the extension of this store.
- B&Q, Buchan Way. This store is 4225 sq m GFA with an estimated turnover of £3.4m pa. Planning permission has been granted for additional bulky goods retail warehousing on land adjacent to B&Q as part of the proposed “Buchan Gateway” development.

3.134 Total retail turnover in the town of Peterhead is approximately £115m of which only £36m is from town centre shops i.e. only 31% of total retail turnover of the town is from town centre shops. This proportion will reduce further with the development of additional approved out-of-centre retail floorspace.

Retail Proposals

3.135 Four schemes for additional significant retail floorspace have been granted planning permission:

- Extension of Asda supermarket. This proposal would provide an additional 1956 sq m GFA.
- Buchan Gateway. These proposals are for an additional 4645 sq m GFA retail warehousing for bulky goods.
- St Peter Street, Peterhead. This scheme is for the redevelopment of a vacant site for 1858 sq m GFA. This site is located within the defined town centre boundary.
- Kirkburn Mills. Kirkburn Mills is located to the south of the town centre. The proposal is a mixed retail development comprising an Aldi discount foodstore and a series of medium-large units retailing a range of retail goods (mixed general and bulky comparison goods). In total the development proposes 4565 sq m GFA.

3.136 The total floorspace consented in Peterhead is 13,024 sq m of which only 14% is proposed to be located within the town centre. If implemented this will further reduce the relative importance of the town centre in terms of retail floorspace and turnover within the town. Because all of these development proposals have been granted planning permission they have been treated as retail “commitments” in the Strategic Retail Model.

Changes over Time

3.137 Total numbers of retail goods and service units in the town centre have remained broadly the same since 2004. There has been some fluctuation with the highest number of units identified in 1999 (166 units) and the least in 2008 (150 units). Turnover has grown modestly, in real terms, since 2004 with an increase of 5%. For the town as a whole there has been a significant increase in total retail turnover – from £79m (for Zone 11 as a whole) to £115m – an increase of almost 50%. The changes in retail turnover in Peterhead therefore contrast with the position in Fraserburgh where total turnover has been static (with decline in the town centre).

Catchment Area

3.138 The primary catchment area for Peterhead for all categories of retail goods comprises Zone 11. The secondary catchment area for all goods includes Zones 10 and 11 and for bulky goods also extends to Zone 13.

3.139 Market penetration rates within the catchment areas are very high for convenience goods within the primary catchment area (in excess of 90%) and high in Zone 11 (55%) but lower elsewhere. Market share for comparison goods is lower but still quite high – in the region of 35-50% with the primary catchment area.

3.140 Since 2004 the secondary catchment area for Peterhead has extended to include significant parts of Zone 10 (Fraserburgh area). In addition, for bulky goods, significant flows are from Zone 13 (Ellon) area – presumably because of the B&Q DIY retail warehouse.

3.141 These changes, together with the relative growth of retail turnover as a whole in Peterhead compared to Fraserburgh, demonstrate that, for the town as a whole, Peterhead has grown as a retail destination serving the north eastern part of Aberdeenshire. In 2004 the study identified that retail turnover in Zone 10 (Fraserburgh area) was 20% higher than Zone 11 (Peterhead) – this position has now reversed with Zone 11 having 24% higher turnover than Zone 10. If all the proposed floorspace in both Peterhead and Fraserburgh is implemented this will further increase the relative importance of Peterhead vis-à-vis Fraserburgh.

Town Centre Health Check

3.142 In overall terms Peterhead town centre exhibits mixed indicators of vitality and viability but there are indications that this has improved in recent years: This includes the following:

- *Range of Retail offer:* the town centre provides a wide retail offer with almost all categories of retail units identified in Goad surveys and, in many, providing significant retail choice.
- *Range of retail and non-retail services:* the town centre provides a wide range of retail services including restaurants, cafes, financial services, hair and beauty etc. and also a good range of other services with few sectors not represented in the centre. A good range of non-retail services and facilities are provided.
- *Shopper/household survey information:* for the town as a whole there are above average levels of satisfaction for food shopping but below average satisfaction for non-food shopping. There are generally high levels of satisfaction for ease of access to the centre. There is a low level of satisfaction with Peterhead as a place to shop.
- *Types of retail operator:* the town centre has a strong independent sector and a good range of multiples. In 2013 22 multiples were identified out of a total of 79 retail goods shops – that is 28% - this is the highest proportion of any town centre within Aberdeenshire.
- *Pedestrian flows:* these have been identified to be the highest of all centres within Aberdeenshire in 2011. However flows in 2011 were identified to be lower than each of 2003, 2005 and 2007.
- *Vacancy rates:* In 2013 15 units were identified as vacant which is 10% by number of units. Vacant floorspace is identified from Regional Assessor information to be 6%. These levels of vacancies are at, or slightly below, current average levels for towns in Scotland – but they are higher than the average level of vacancies in centres in Aberdeen City & Aberdeenshire.
- *Environment:* the town centre presents a mixed quality of environment. It provides a generally well kept and clean centre and is readily accessible and there is evidence of recent investment. However certain locations have poor quality buildings.

3.143 The above indicators demonstrate both strengths and weaknesses. However there are indications that the centre has improved compared to the position identified in 2004.

Review of Retail Sectors

3.144 Within the town as a whole representation in convenience sectors is as follows:

- Within the town centre the convenience retail offer is limited comprising primarily small stores – the largest being the Iceland freezer centre. There are no mainstream supermarkets within the town centre.
- Outwith the town centre there are two major foodstores – Asda is a large supermarket and Morrisons a small superstore. There are proposals to increase the size of Asda. There is also one food discounter and proposals for a second.

3.145 For the town as a whole therefore there are no clear deficiencies in convenience goods retail provision – the principal issue being the limited choice within the town centre itself.

3.146 For comparison goods shops Peterhead provides a reasonable range of both traditional and relatively modern retail units of various sizes. There is a higher proportion of larger units than most other town centres in Aberdeenshire (with the principal exception of Inverurie). This is a key factor in attracting multiples to the centre.

Future Prospects

3.147 Peterhead is located at the northern end of the major growth corridor identified for Aberdeenshire. Its primary and secondary catchment areas include areas of high growth as well as more limited growth. Population growth within the primary catchment area is estimated to be up to 5% by 2027 and, as a result, the market growth for convenience goods is forecast to grow in the long term (growth of 10% from 2013 to 2027) and comparison goods expenditure would be higher (30% between 2013 and 2027).

3.148 As well as identifying significant market growth Peterhead provides a local catchment larger than any other town in Aberdeenshire and, as such, is likely to be more attractive than other towns to the retail market. However, by virtue of its location, it does not have such an extensive secondary catchment as Inverurie. The town is also less affected by competition from new retail floorspace proposals as Fraserburgh. However as a medium-sized town there will be general market pressure for less investment in a town of this size with greater focus in larger centres or those towns with wider catchments. The prospects for Peterhead therefore reflect these conflicting pressures – there will be both opportunities for retail growth balanced by general pressures reflecting the changing structure of retailing.

3.149 The scale of retail proposed for the town through existing planning consents is substantial – in total over 13,000 sq m which, if implemented, would represent a total increase of approximately 30% of retail goods floorspace. There are, therefore, some doubts whether all of this space would be developed, however, because the planning consents are in place all are treated as retail “commitments”. This scale of space should be regarded as sufficient for the general growth of retailing in Peterhead for the period up to 2022.

Key Retail Issues and Retail Deficiencies

3.150 For convenience goods no significant quantitative retail deficiency is identified for Peterhead – this reflects existing proposals for new convenience floorspace within the town.

3.151 For comparison goods key factors are: the existing local market; significant local market growth; limited competition from new retail floorspace proposed in other retail locations but, noting that Fraserburgh is a significant retail competitor to Peterhead; potentially less favourable market consideration; and existing retail

proposals. Taking these factors together no additional retail floorspace is identified beyond existing retail commitments.

Proposed Retail Strategy

3.152 The recommended Retail Strategy proposes:

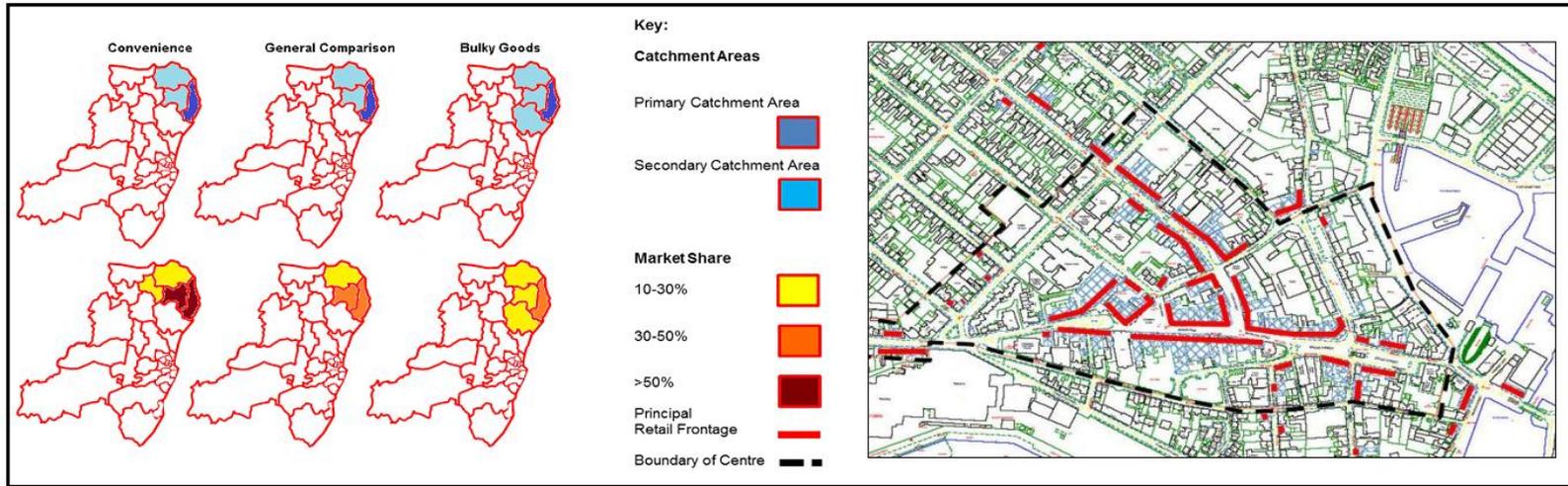
- Identification of Peterhead centre as a **town centre** in the retail network.
- Policies to protect Peterhead town centre from adverse impact from retail proposals.
- No identification of significant additional retail floorspace beyond existing retail commitments.
- At present no out-of-centre retail locations are identified as commercial centres in the retail network. Although there is substantial out-of-centre retail space this is dispersed in four different locations without any clear retail concentration. However, if substantial new retail floorspace is implemented at Buchan Gateway then this, including B&Q, could be considered to be a future Commercial Centre in the network of retail centres.

Summary and Conclusions

3.153 Peterhead town centre demonstrates mixed indicators of vitality and viability although there is evidence of improvement over the past decade. A high proportion of retail floorspace is located outwith the town centre and this is expected to increase with the implementation of consented schemes. For the town as a whole Peterhead has improved over the past decade particularly when compared to Fraserburgh. Its prospects for growth are mixed – it has a relatively large local market which is forecast to grow – however changes in the structure of retailing are likely to favour larger stronger centres.

3.154 The recommended Retail Strategy therefore continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. Because of the scale of existing retail proposals and commitments no further floorspace is identified within the strategy. No locations outwith the town centre are identified as Commercial Centres within the retail network however, if implemented, Buchan Gateway could be considered a possible future “Commercial Centre”.

Figure 3.7 Peterhead



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods			All Goods				
		GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m
Retail Goods Shops	83	3492	2270	2589	9.04	11310	7351	3180	23.38	3183	2069	1787	3.70	17985	11690	3090	36.12
Retail Services	60													8331			
Vacant	15													1573			
Total	158	3492	2270		£9.04m	11310	7351		£23.38m	3183	2069		£3.70m	27889	11690		£36.12m

Year	Recent Changes					Retail Goods Turnover £m	Vitality and Viability Summary		Retail Strategy Summary	
	Conv	Comp	Ret Services	Vacant	Total		Strengths	Centre Classification	Planning Policy Approach	Proposed Retail Floorspace
1999	20	85	52	9	166	£34.34m	Slightly above average levels of satisfaction for food shopping (it is assumed that this reflects out of centre foodstores) and below average satisfaction for comparison goods shopping. Generally high levels of satisfaction for ease of access to the centre. Low levels of satisfaction for Peterhead town centre as an attractive place to shop.	Town Centre Buchan Gateway <i>when implemented</i> - potential future Commercial Centre	Protection and promotion of floorspace (commitments)	Commitments St Peter St 1858 sq m GFA Kirkburn Mills OOC - 4565 sq m GFA Asda Extension - +1956 sq m GFA Buchan Gateway - 4645 sq m Bulky Goods
2004	11	70	53	24	158					
2006	12	68	55	16	151	£36.12m 5%	Strengths: Cleanliness of centre, public realm; accessibility; and generally good diversity of uses. Evidence of significant recent investment. Average rating in AC health check – ranked 4 th of 9 centres surveyed. Vacancies are close to national average (10% by number of units in 2013). However this represents a significant reduction (i.e. improvement) in numbers of vacant units identified in the period 2004-2008. Weaknesses: Limited food retail offer in centre. Summary: overall mixed indicators of vitality and viability. However appears to have improved in recent years.	Proposals		
2008	12	66	49	23	150					
2013	14	69	60	15	158					

Portlethen

3.155 Key data for retail provision in Portlethen as a whole is provided in Figure 3.8 provided at the end of this section.

Overview of Retail Provision

3.156 Retail provision within Portlethen primarily comprises the retail park and limited additional parades of shops. In this study the existing retail park together with the small unit shops at Muirend Road are identified as the District Centre. Local shops are located elsewhere in Portlethen.

Portlethen District Centre

- The District Centre comprises 11 retail and retail service units – 1 convenience, 5 comparison, 5 retail services and 0 vacant units.
- The total retail goods and services floorspace is 22,603 sq m of which 25% is convenience goods, 32% general comparison, 40% bulky goods and 3% retail services.
- Retail goods turnover is estimated to be £66.2m (2011 prices) with 54% from convenience goods, 30% from general comparison and 16% from bulky goods.
- The Asda store is a major store and accounts for 42% of the total floorspace (9473 sq m GFA) and 69% of the retail turnover of the town centre (£46.5m). Whereas the retail warehouse units are likely to function independently of the Asda it is likely that part of the profile of these units benefits from the location opposite the superstore and also the small units are also likely to benefit from pass-by trade to and from Asda. As a result it is considered that the Asda superstore does perform an anchor role for the centre as a whole.

Other Retail Floorspace

3.157 Outwith the District Centre there are a series of local shopping parades. The floorspace and turnover of these is very limited compared to the shops described as located within the defined District Centre.

Retail Proposals

3.158 There are no proposals for new retail floorspace within Portlethen. However turnover in the Asda would be affected by new floorspace proposed at Cove/Loirston, Chapelton of Elsick and Stonehaven.

Changes over Time

3.159 Information has been provided of total retail units within the whole of Portlethen. In terms of total units this indicates that retail provision has remained broadly constant over the past 10 years (since 2004). However the total retail turnover of the existing shops has declined significantly over this period. This decline has affected both the Asda superstore and other retail units within the retail park. The full reasons for this decline are not readily apparent but probably reflect the improved retail offer at Garthdee and the new Asda store at

Boulevard Retail Park resulting in trade draw from Cove/south Aberdeen directed away from Portlethen. The reasons for reduced turnover in the other retail units is not clear.

Catchment Area

- 3.160 The primary catchment area for Portlethen shops comprises Zone 31 (Portlethen area) for convenience and general comparison goods. Although significant expenditure is also generated from residents within Stonehaven to the extent that the importance of Stonehaven to these shops is sufficient to include it within the primary catchment area. The secondary catchment area also extends to the south and west comprising Zones 20E, 20W, and 22. Trade draw for bulky goods purchases is evenly spread to the south and west such that it is difficult to identify a clear primary catchment area.
- 3.161 Market penetration rates within the catchment areas are moderately high for convenience goods within each of Zones 20E, 20W, 21 and 31 – all in the range of 30-50%. A similar pattern is identified for general comparison and bulky goods but with lower market share typically in the range of 10-20%.
- 3.162 Since 2004 the geographical extent of the catchment areas has remained generally the same, however, the market share achieved by shops in Portlethen in this area has declined.

Town Centre Health Check

- 3.163 The nature of the District Centre with a limited range of retail units and additional services and facilities makes it difficult to apply the normal concept of vitality and viability to the centre. The lack of additional facilities limits the notion of vitality in the centre and the key issue is the viability of retail units. The strategic model identifies that sales densities, which are a good indicator of long term viability, are below notional average levels reflecting the higher quality of retail offer found in south, west and central Aberdeen. In terms of conventional indicators of vitality and viability:
- *Range of Retail offer:* the District Centre provides a limited retail offer.
 - *Range of retail and non-retail services:* the District Centre provides only a limited range of additional retail and non-retail services.
 - *Shopper/household survey information:* for the District Centre there is an above average level of satisfaction for food shopping but average levels of satisfaction for non-food shopping. There is a very high level of satisfaction for overall access – reflecting ease of travel by private car but also above average in terms of public transport access. Overall level of satisfaction as an attractive place to shop is close to average.
 - *Types of retail operator:* the District Centre has a limited range of retail operators – floorspace is dominated by multiples.
 - *Vacancy rates:* No units are currently vacant.
 - *Environment:* the District Centre is dominated by car parks and provision for access by car. The retail units are relatively old retail warehouse units. The overall environmental quality is poor and does not cater well for pedestrians.

Review of Retail Sectors

3.164 Within the town as a whole representation in convenience sectors is as follows:

- Limited independent retailers – most retail goods shops are operated by multiples.
- Elsewhere in the town there are a few small and independent convenience shops.

3.165 For comparison goods shops these are dominated by the large retail warehouse units. The small number of these limits the ranges of goods on offer although each of Asda, Matalan and Argos provide a very wide range of goods within their stores.

Future Prospects

3.166 The primary and secondary catchment areas for Portlethen are located within the major growth corridor south of Aberdeen and include within them the proposed new town of Elsick. Significant growth is also identified in Cove/Loirston to the north but limited growth is identified for Portlethen itself. The location of the District Centre adjacent to the A90, and the provision of extensive car parking and good vehicular access would indicate that the centre would be well placed to benefit from market growth.

3.167 A key issue is the extent of development proposals in nearby areas that would compete with the District Centre. This includes the development of a new centre for Elsick, which would provide both convenience and comparison floorspace, and a proposed superstore at Loirston/Cove. These would reduce the rate of growth expected to be achieved at Portlethen.

3.168 Drawing these factors together it is expected that Portlethen will benefit from significant growth in retail turnover. Convenience turnover is expected to be limited (due to the proposed new floorspace in nearby areas) but comparison goods turnover is expected to be significant.

Key Retail Issues and Retail Deficiencies

3.169 For convenience goods no significant quantitative retail deficiency is identified for Portlethen.

3.170 For comparison goods the key factors are: the large existing market; significant market growth; and significant limited competition from other retail locations; and potentially favourable market consideration. As a result of the identified role in supporting a new town centre at Elsick no new retail floorspace is identified for Portlethen as part of the proposed retail strategy. However, although identified as a District Centre, the format of the retail park and lack of integration with both the unit shops along Muirend Road and existing housing raises the issue of future design and development that would extend the range of services, facilities and shopping that would enable the centre to better link into nearby residential areas.

Proposed Retail Strategy

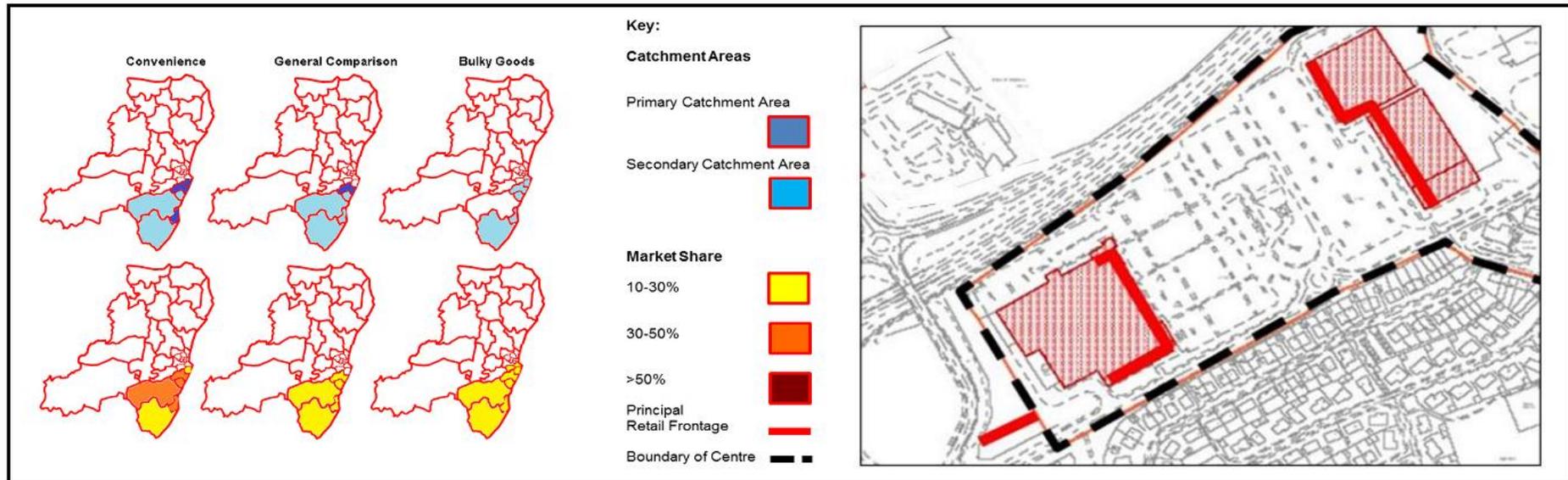
3.171 The recommended Retail Strategy proposes:

- Identification of Portlethen centre as a ***District Centre*** in the retail network.
- Policies to protect Portlethen District Centre from adverse impact from retail proposals.

Summary and Conclusions

- 3.172 Portlethen District Centre comprises, primarily, a retail park which includes both a series of large retail warehouse units and a superstore. In addition there is a parade of small unit shops. The centre primarily caters for car borne shopping. Over the past decade although the total floorspace has remained the same turnover has declined as a result of increased competition from south Aberdeen.
- 3.173 The recommended Retail Strategy identifies the centre as a District Centre in the network and seeks to protect this from adverse retail impact.

Figure 3.8: Portlethen



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	6	5684	3126	11323	35.40	7749	5229	3844	20.10	7442	5392	8436	10.66	20875	13747	4812	66.16
Retail Services	5													662			
Vacant	0																
Total	11	5684	3126		£35.40m	7749	5229		£20.10m	7442	5392		£10.66m	21537	13747		£66.16m

Recent Changes							Vitality and Viability Summary		Retail Strategy Summary	
Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m	The concept of indicators of vitality and viability are difficult to apply to Portlethen. The key issue relates to viability of the existing retail units as shown by notional average turnover levels and the retail model shows that existing sales densities are below notional average levels. This probably reflects the relatively higher quality of retail offer in south, west and central Aberdeen compared to Portlethen.	Centre Classification		
Whole Town									District Centre	
2004	3	10	11		24	£87.97m			Planning Policy Approach	
2008	3	6	13		22				Proposed Retail Floorspace	
2013	3	3	5	0	11	£66.16m		Commitments		
						-25%		Proposals		

Stonehaven

3.174 Key data for retail provision in Stonehaven town centre is provided in Figure 3.9 provided at the end of this section.

Overview of Retail Provision

3.175 Retail provision within Stonehaven primarily comprises the town centre together with a Co-op supermarket located just to the north of the town centre.

Stonehaven Town Centre

- The town centre comprises 101 retail and retail service units – 15 convenience, 35 comparison, 47 retail services and 4 vacant units.
- The total retail goods and services floorspace is 11,314 sq m of which 21% is convenience goods, 31% general comparison, 4% bulky goods, 41% retail services and 4% vacant.
- Retail goods turnover is estimated to be £13.4m (2011 prices) with 41% from convenience goods, 54% from general comparison and 5% from bulky goods.
- There is no single major store within the town centre.

Other Retail Floorspace

3.176 Outwith the town centre the principal retail unit is the Co-op supermarket. This is located within 50m of the defined town centre and within 300m of the principal retail frontages in the town centre. The store is 1574 sq m GFA and is estimated to have a turnover of £6.7m. This store therefore has a turnover equivalent to nearly half that of the town centre as a whole. The close proximity of the supermarket to the town centre and regular pedestrian trips between the two would indicate a close relationship between the supermarket and the town centre suggesting that, in retail terms, the Co-op supermarket can be regarded as functionally part of the town centre.

3.177 Elsewhere in the town there is additional retail floorspace serving local or neighbourhood markets.

Retail Proposals

3.178 At the present time there are no planning applications approved for additional retail floorspace within Stonehaven. In recent years there have been proposals for locations outwith the existing urban boundary of the town which have been dismissed at appeal. The LDP allocates land for retail close to the railway station but there are no specific proposals for development on this site.

Changes over Time

3.179 Total numbers of retail goods and service units in the town centre have remained constant since 1999. However there has been a reduction in retail goods shops and an increase in retail service units. Despite this retail turnover has been identified to *increase* since 2004 by 17%. It should be noted, however, that the

principal reduction in retail goods shops was identified to be between 1999 and 2004 and, since 2004, the number of retail goods shops and floorspace has declined only slightly.

Catchment Area

3.180 The primary catchment area for Stonehaven town centre (plus the Co-op supermarket) comprises Zone 21 i.e. the town of Stonehaven for all retail goods categories. Similarly the secondary catchment area comprises areas to the west and north of Stonehaven (Zones 20E, 20W, 21 and 22) for all retail goods categories.

3.181 Market penetration rates within the catchment areas are, however, comparatively low. Within Zone 21 market share of town centre shops (plus the Co-op) is only 35% of total available expenditure and rates in the secondary catchment area are much lower. A similar pattern is also identifiable for general comparison and bulky goods. This pattern is broadly similar to that identified in 2004.

Town Centre Health Check

3.182 In overall terms Stonehaven town centre exhibits strong indicators of vitality and viability: This includes the following:

- *Range of Retail offer:* the town centre provides a reasonably wide retail offer with almost all categories of retail units identified in Goad surveys but in most of these categories there is limited choice.
- *Range of retail and non-retail services:* the town centre provides a wide range of retail services including restaurants, cafes, financial services, hair and beauty etc. and also a good range of other services with few sectors not represented in the centre. A good range of non-retail services and facilities are provided.
- *Shopper/household survey information:* for the town centre there is a low level of satisfaction for all types of retail shopping but high level of satisfaction in terms of ease of access to the centre. In overall terms the surveys identify that there is an average level of satisfaction with Stonehaven as a place to shop.
- *Types of retail operator:* the town centre has a strong independent sector but a relatively limited range of multiples. In 2013 9 multiples were identified out of a total of 49 retail goods shops – that is 18%. The range of multiples is higher than most other Aberdeenshire towns.
- *Pedestrian flows:* these have been identified to be significantly above average for Aberdeenshire towns in 2011. In 2011 flows were identified to be lower than either 2005 and 2007 but higher than 2003.
- *Vacancy rates:* In 2013 4 units were identified as vacant which is 4% by number of units. A similar figure is identified for vacant floorspace from Regional Assessor information. These are low vacancy rates well below the Scottish average.
- *Environment:* the town centre presents a high quality of environment. This reflects ease of access for pedestrians within the centre, high quality of buildings, access to the sea front etc. However traffic and parking within the centre can adversely affect pedestrian amenity.

Review of Retail Sectors

3.183 Within the town as a whole representation in convenience sectors is as follows:

- No main food shopping provision within the town – the only shop catering for this sector in any way in the mid-sized Co-op supermarket. There is also no limited assortment discounter in the town. There has been sustained market interest in the development of a large supermarket within the town over the past decade.
- Good range of independent specialist retailers.
- Choice of convenience-format stores.

3.184 For comparison goods shops Stonehaven provides a good range of both traditional retail units of various sizes a number of which are operated by national and regional multiples. These are suitable for both independent retailers and multiples.

Future Prospects

3.185 Stonehaven's primary catchment and much of its secondary catchment is included within a major growth corridor. However the principal areas of new housing development are focussed on the new town of Elsick with the result that population growth in Stonehaven is expected to be low. Although development of Elsick will generate a significant increase in available expenditure and the retail market this will be catered for through the development of a new town centre and therefore Stonehaven is not expected to benefit significantly from this.

Key Retail Issues and Retail Deficiencies

3.186 The key retail issue for Stonehaven is the lack of main food supermarket serving the town. As a result there has been a high level of expenditure leakage for convenience goods. To date no site has been forthcoming that could satisfy both planning and market requirements that can address this quantitative and qualitative retail deficiency. In the absence of this high levels of expenditure leakage are anticipated to continue with shopping trips directed to Portlethen and Aberdeen.

3.187 As with other towns in Aberdeenshire, especially those close to Aberdeen, there is a high level of expenditure leakage for comparison goods. This is expected to continue because of the relatively easy access to major retail units in Aberdeen. Furthermore the retail strategy proposes that additional new comparison floorspace should be directed to the new town of Elsick, to support the formation of a new town centre, in preference to existing towns which, in the case of Stonehaven would result in out-of-centre floorspace rather than developments that would support the existing town centre.

3.188 In market terms the potential demand for a new main food supermarket has been well established over the past decade and this is expected to remain. However there is doubt regarding the marketability of development for non-food retail in a location within or adjacent to the town centre. In contrast a location adjacent to the A90 could be considered favourably in the market in the medium-long term. A development in this location with easy access to the trunk road would significantly increase market potential to the north and south. This development would not support the vitality and viability of the town centre.

Proposed Retail Strategy

3.189 The recommended Retail Strategy proposes:

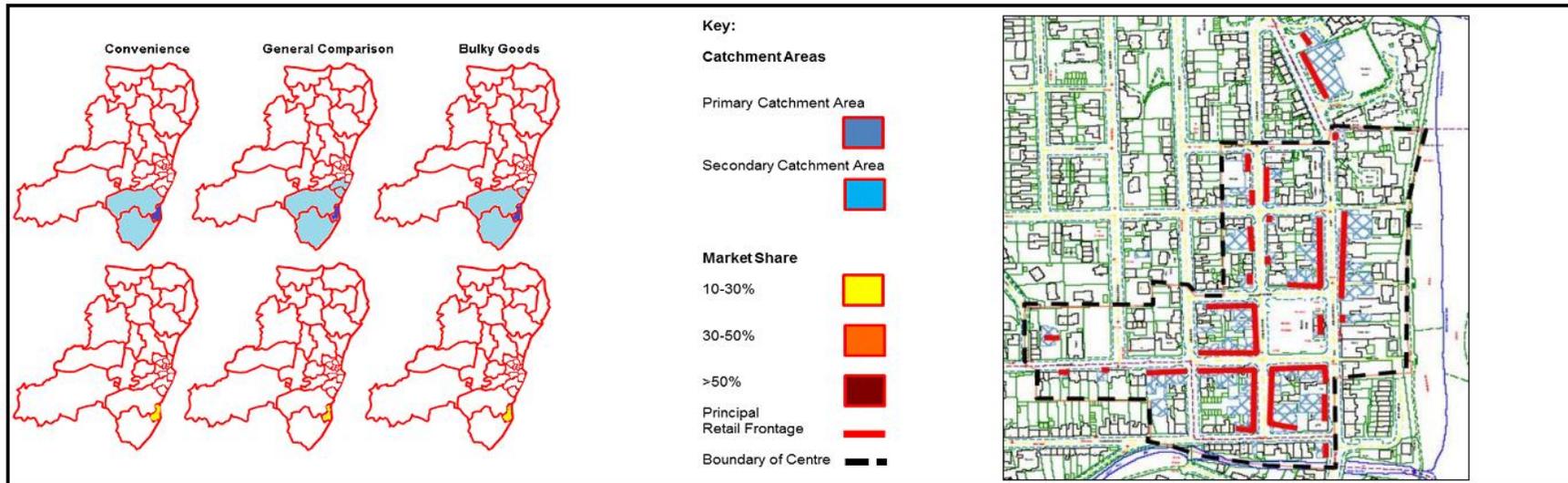
- Identification of Stonehaven centre as a **town centre** in the retail network.
- Policies to protect Stonehaven town centre from adverse impact from retail proposals.
- Identification of a new supermarket to cater for main food shopping requirements – 4000 sq m GFA supermarket. Location not identified.

Summary and Conclusions

3.190 Stonehaven town centre is a relatively strong town centre which has maintained its retail and retail service offer over the last decade. It demonstrates comparatively strong indicators of vitality and viability. Within the town there has been a longstanding issue associated with the lack of a main food supermarket to serve the town.

3.191 The recommended Retail Strategy therefore continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. Furthermore a new supermarket of 4000 sq m GFA is proposed to serve the town although no specific location is proposed for this.

Figure 3.9: Stonehaven



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	50	2372	1542	2386	5.66	3468	2254	3361	7.58	431	280	2575	0.72	6271	4076	3425	13.96
Retail Services	47													4608			
Vacant	4													435			
Total	101	2372	1542		£5.66m	3468	2254		£7.58m	431	280		£0.72m	11314	4076		£13.96m

Year	Recent Changes					Retail Goods Turnover £m	Vitality and Viability Summary		Retail Strategy Summary	
	Conv	Comp	No. of Units Ret Services	Vacant	Total		Strengths	Weaknesses	Centre Classification	Proposed Retail Floorspace
1999	14	50	34	4	102	£11.93m £13.96m 17%	Strengths Strengths: Low vacancy rate; ease of movement within centre; environmental quality of centre; reasonable range of retail offer. Above average rating in AC health check – ranked 2 nd of 9 centres surveyed. Vacancies are well below national average (4% by number of units in 2013). Weaknesses Weaknesses: Limited food retail offer (no major main food shop), adverse impacts of traffic on amenity. Below average levels of satisfaction for all categories of shopping. High levels of satisfaction for ease of access to the centre. Overall average levels of satisfaction for Stonehaven town centre as an attractive place to shop. Summary: generally strong indicators of vitality and viability.	Centre Classification	Town Centre	
2004	14	39	36	10	99			Planning Policy Approach	Protection and promotion of significant new retail floorspace	
2006	14	40	45	3	102			Proposed Retail Floorspace	Commitments Proposals 4000 sq m supermarket - location to be determined	
2008	15	42	44	1	102					
2013	15	35	47	4	101					

Turriff

3.192 Key data for retail provision in Turriff town centre is provided in Figure 3.10 provided at the end of this section.

Overview of Retail Provision

3.193 Retail provision within Turriff primarily comprises shops in the existing town centre.

Turriff Town Centre

- The town centre comprises 78 retail and retail service units – 14 convenience, 32 comparison, 30 retail services and 2 vacant units.
- The total retail goods and services floorspace is 14,663 sq m of which 30% is convenience goods, 45% general comparison, 6% bulky goods, 18% retail services and 1% vacant.
- Retail goods turnover is estimated to be £22.5m (2011 prices) with 50% from convenience goods, 41% from general comparison and 9% from bulky goods.
- The largest shops in the town centre are Tesco (1311 sq m GFA and £6.7m turnover) and the Co-op (734 sq m GFA and £2.1m turnover). Given the range and types of shops in the town centre it could be considered that the Tesco store does provide an anchor role within the town centre.

Retail Proposals

3.194 Planning permission was granted in 2011 for a new supermarket to be located at Market Street. This proposal is for a large supermarket of 3200 sq m GFA (similar in size to the Asda and Tesco supermarkets in Huntly). This planning consent is treated as a retail “commitment” although it is possible that implementation may be less likely if the Banff Tesco store is developed.

Changes over Time

3.195 Unlike most other town centres Turriff has experienced significant retail growth in terms of retail units, floorspace as well as turnover. The number of retail and retail service units has increased from 63 identified in 1999 and 70 in 2004. Turnover has increased significantly and much of this is associated with greater use made of the Tesco store compared to when it was operated by Somerfield.

Catchment Area

3.196 The primary catchment area for Turriff town centre for all retail goods is Zone 6 i.e. the town of Turriff and the immediate rural hinterland. Some trade is also drawn from Zones 7, 8 and 9 – the latter are rural areas with limited population but Zone 7 includes areas close to Banff. Significant trade from Zone 7 is directed to Turriff for comparison goods.

3.197 Market penetration rates within the catchment areas are, however, not particularly high. Within Zone 6 market share of town centre shops is 45% of total available expenditure and rates in the secondary catchment area

are much lower. A similar pattern is also identifiable for general comparison and bulky goods where market share is no higher than 25%. This pattern is broadly similar to that identified in 2004.

Town Centre Health Check

3.198 In overall terms Turriff town centre exhibits generally strong indicators of vitality and viability despite its limited size.

- *Range of Retail offer:* the town centre provides a generally limited retail offer with most categories of retail units identified in Goad surveys but in most of these categories there is limited choice.
- *Range of retail and non-retail services:* the town centre provides a good range of retail services including restaurants, cafes, financial services, hair and beauty etc. and also a good range of other services with few sectors not represented in the centre. A good range of non-retail services and facilities are also provided.
- *Types of retail operator:* the town centre has a strong independent sector but a relatively limited range of multiples.
- *Pedestrian flows:* these have been identified to be slightly below average for Aberdeenshire towns in 2011. However there appears to be a steady decline in pedestrian flows identified from surveys from 2003 to 2011.
- *Vacancy rates:* In 2013 Regional Assessor identified only 2 units vacant which is 3% by number of units and only 1% of retail floorspace. It is possible that this slightly underestimates vacant floorspace but, despite this, vacancy rates have remained consistently well below Scottish averages.
- *Environment:* the town centre presents a high quality of environment. This reflects ease of access for pedestrians within the centre and generally high quality of buildings.

Review of Retail Sectors

3.199 Within the town as a whole representation in convenience sectors is as follows:

- Two medium sized supermarkets (Tesco and Co-op).
- Good range of independent specialist retailers.
- There is no large supermarket that caters well for bulk main food shopping trips nor discounters.

3.200 For comparison goods shops Turriff provides a limited retail offer typical of a small rural town. Most retail units are small and this, together with the relatively small market area served, limits the attractiveness of these to multiples.

Future Prospects

- 3.201 The primary catchment area served by Turriff lies outwith the main growth areas of Aberdeenshire and future population is expected to remain broadly static. Convenience expenditure is therefore expected to grow modestly (less than 3% growth from 2013 to 2027) and comparison goods expenditure would grow significantly (growth of 22% from 2013 to 2027).
- 3.202 However proposed new supermarkets both within Turriff and in Banff and additional comparison floorspace growth in Inverurie will increase retail competition for shops within Turriff town centre. These combined with general market trends towards larger centres will significantly constrain future growth in retail provision in Turriff. Nonetheless Turriff has grown significantly over the past decade and this growth has been, to a large extent, unexpected given the size of the town and the quality of retail provision in competing towns. It is possible that Turriff will continue to defy general market trends and be able to sustain and improve its retail offer in future years.

Key Retail Issues and Retail Deficiencies

- 3.203 The key retail issues for Turriff are:
- Limited size of market – the rural hinterland of the town has low population densities. Competition from Banff and Inverurie will increase with the development of new retail floorspace.
 - Relatively low growth of market.
 - Relatively remote location from other towns which has supported use of local retail facilities and shops.
- 3.204 The proposed new supermarket at Market Street could significantly improve the retail offer within the town as a whole but this will compete directly with the Tesco and Co-op stores. Although this must be treated as a commitment because of the planning permission granted for the proposal it is uncertain that the scheme will be implemented if the Banff supermarket proceeds.

Proposed Retail Strategy

- 3.205 The recommended Retail Strategy proposes:
- Identification of Turriff centre as a **town centre** in the retail network.
 - Policies to protect Turriff town centre from adverse impact from retail proposals.
 - Treatment of the supermarket proposal for Market Street as a retail commitment.
 - No identification of any additional retail floorspace within the town.

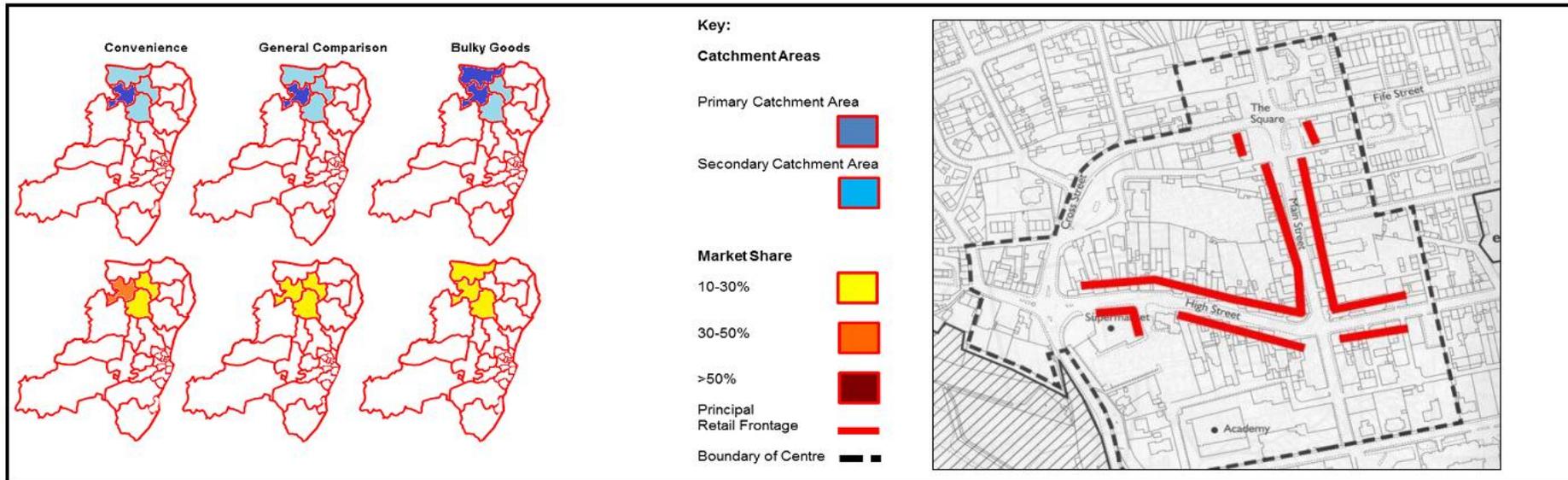
Summary and Conclusions

- 3.206 Turriff town centre has grown significantly in terms of numbers of retail units, floorspace and turnover over the past 15 years and this has, to an extent, been contrary to national retail trends favouring market concentration. This may reflect a combination of an attractive town centre combined with relative isolation

from larger centres resulting in a relatively strong local support for town centre shops with the result that the town centre has managed to maintain market share as available expenditure has grown. As a result the town centre has relatively strong indicators of vitality and viability. There are, however, uncertainties regarding future growth as a result of low market growth and increased competition from new floorspace in Banff and Inverurie.

- 3.207 The recommended Retail Strategy therefore continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. Furthermore the proposed supermarket at Market Street is identified as a retail commitment.

Figure 3.10: Turriff



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	46	4468	2869	2517	11.25	6595	4285	2181	9.35	837	544	3578	1.95	11899	7698	2928	22.54
Retail Services	30													2592			
Vacant	2													172			
Total	78	4468	2869		£11.25m	6595	4285		£9.35m	837	544		£1.95m	14663	7698		£22.54m

Recent Changes							Vitality and Viability Summary			Retail Strategy Summary	
Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m	Strengths Above average rating in AC health check – ranked 2 nd of 9 centres surveyed. Vacancies are below national average (6% by number of units in 2008 – more recent figures not available). Strengths: High quality environment in town centre; good diversity of uses; good range of independents. Weaknesses Weaknesses: Limited multiples in centre. Summary: general strong indicators of vitality and viability.	Centre Classification			
2004	13	26	21	3	63	£11.65m		Town Centre			
2008	13	30	23	4	70			Protection			
2013	14	32	30	2	78	£22.54m		Proposed Retail Floorspace Commitments Supermarket - 3200 sq m GFA Proposals			

Westhill

3.208 Key data for retail provision in Westhill town centre is provided in Figure 3.11 provided at the end of this section.

Overview of Retail Provision

3.209 Retail provision within Westhill includes both the town centre and major units comprising Tesco and Costco at Endeavour Drive.

Westhill Town Centre

- The town centre comprises 30 retail and retail service units – 4 convenience, 9 comparison, 16 retail services and 1 vacant unit.
- The total retail goods and services floorspace is 6078 sq m of which 54% is convenience goods, 19% general comparison, 0% bulky goods and 27% retail services. Regional Assessor information does not identify vacant floorspace within the centre.
- Retail goods turnover is estimated to be £15.2m (2011 prices) with 78% from convenience goods and 22% from general comparison goods.
- Within the town centre the M&S Simply Food and the Aldi foodstore act as important anchors to the town centre as a whole. M&S Simply Food is 1650 sq m GFA with an estimated turnover of £8.1m and the Aldi has 1679 sq m GFA and turnover of £4.7m

Other Retail Floorspace

3.210 Outwith the town centre the Tesco superstore and Costco retail warehouse “club” dwarf the floorspace and turnover of the town centre. These two units provide 16,162 sq m GFA (more than double the town centre floorspace) and have an estimated turnover of £66.4m (over four times that of the town centre). These units define the extent of the catchment area served by shops within the town.

Retail Proposals

3.211 Planning permission was granted for 1200 sq m GFA retail floorspace within the town centre. It is assumed that this would include both convenience and comparison floorspace.

Changes over Time

3.212 Total numbers of retail goods and service units in the town centre have increased since 1999. This reflects the development of new floorspace including the Aldi store and associated development and new units developed at Ashdale Drive. As a result there has been an increase in retail turnover of 14% since 2004 despite the diversion of trade to Tesco.

Catchment Area

3.213 The catchment area for shops in Westhill reflects the wide draw to both the Tesco superstore and also Costco. In addition the Simply Food store is identified to draw from areas beyond Westhill. The primary catchment area for Westhill is identified to be Zone 18 with a secondary catchment identified to comprise 17, 19, 29N and 29S.

3.214 Market penetration rates within the catchment areas are comparatively low. Market penetration rates for convenience goods are estimated at 30% within the primary catchment but significantly lower in the secondary catchment. Trade draw for comparison goods (primarily to Costco) are especially wide but penetration rates are low. This reflects the particular characteristics of Costco as a retail warehouse club.

Town Centre Health Check

3.215 In overall terms Westhill town centre exhibits mixed indicators of vitality and viability: This includes the following:

- *Range of Retail offer:* the town centre is small and has a limited retail offer. The centre provides only a limited range of types of retail unit. There is clear evidence of the centre attracting new investment.
- *Range of retail and non-retail services:* the town centre provides some additional retail services including cafes, financial services, hair and beauty etc. and a limited range of additional non-retail services.
- *Shopper/household survey information:* for the town there are above average levels of satisfaction for food shopping but below average satisfaction for non-food shopping. In overall terms the surveys identify that there is an average level of satisfaction with Westhill as a place to shop.
- *Types of retail operator:* taking into account the limited number of retail units within the town centre it has a relatively strong independent sector but limited numbers of national or regional multiples – however this reflects the limited number of units within the centre and, if one considers multiples as a proportion of all retail goods operators in the centre the proportion of multiples is high (almost 50%).
- *Pedestrian flows:* no information is available on pedestrian flows.
- *Vacancy rates:* In 2013 1 unit is identified as vacant which is 3% by number of units. No information on floorspace is available from the Regional Assessor but this is estimated to be approximately 1-2% of total floorspace within the centre. These are low vacancy rates well below the Scottish average.
- *Environment:* the town centre presents a generally good quality of environment with modern buildings in a well maintained environment. However provision for cars tends to dominate

Review of Retail Sectors

3.216 Within the town as a whole representation in convenience sectors is as follows:

- Limited representation from independents.

- Each of: main food supermarket/superstore, mid-sized supermarket and limited assortment discounter are in the town.

3.217 For comparison goods shops Westhill provides a very limited retail offer. New floorspace is proposed and comparison goods shops will need to compete with convenience shops and retail services to occupy this space.

Future Prospects

3.218 The catchment area served by shops in Westhill is very wide ranging – this includes both Aberdeenshire and western parts of Aberdeen. Within this wide catchment significant population and market growth is identified. However there is also a wide range of new retail proposals identified which will compete with retail units within the town and also for new retail units that are seeking a retail presence in this general area. Competing retail developments include:

- Additional retail floorspace including superstore and comparison floorspace in Inverurie.
- New District Centres/retail floorspace to serve Newhills/Countesswells/west Aberdeen.
- New town centre to serve Elsick

3.219 Notwithstanding the above the growth of the local market and wide draw associated with the shops at Endeavour Drive are anticipated to result in on-going demand for new retail floorspace within Westhill for the foreseeable future.

Key Retail Issues and Retail Deficiencies

3.220 The principal issues for Westhill are:

- Significant and growing existing market area.
- Increased competition from retail proposals – particularly those in west Aberdeen
- Current levels of under-provision within the existing town centre compared to the size of the town and the extent to which this reflects market “lag” between commercial floorspace and residential development.
- The impact of the AWPR on market demand for locations in or near Westhill.
- Lack of land within or adjacent to the existing town centre for future growth.
- The lack of range of retail offer – especially for comparison goods shops within the town centre.

Proposed Retail Strategy

3.221 The recommended Retail Strategy proposes:

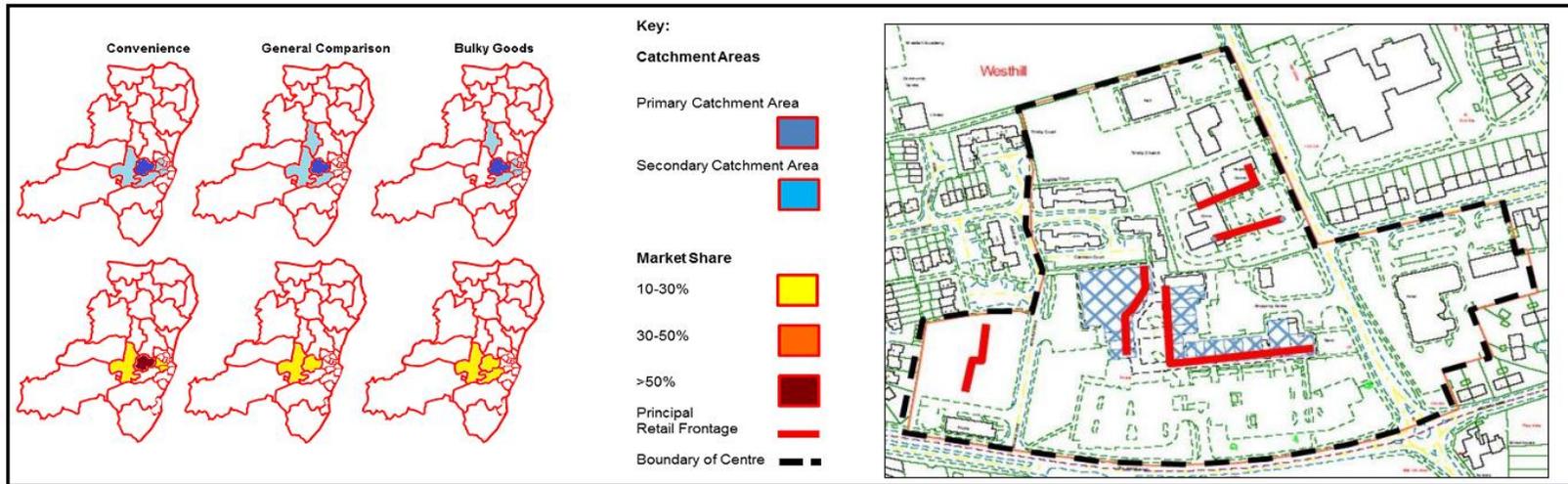
- Identification of Westhill centre as a **town centre** in the retail network.
- Policies to protect Westhill town centre from adverse impact from retail proposals.
- Identification of existing town centre proposals as a retail commitment.
- Identification of Tesco and Costco as a Commercial Centre within the network of retail centres.

Summary and Conclusions

3.222 Westhill town centre is relatively new and its unique characteristics reflect the new town character of the settlement. The retail turnover of the town centre is dwarfed by turnover from Tesco and Costco located at Endeavour Drive. Notwithstanding the small size of the town centre it demonstrates comparatively strong indicators of vitality and viability. There are a number of competing pressures affecting future retail growth including strong market growth, proposed new retail floorspace in west Aberdeen and proximity to the AWPR. On balance it is considered that these will still result in long term growth for the centre but the lack of space for new development within or adjacent to the centre may result in demand for out-of-centre retail floorspace.

3.223 The recommended Retail Strategy therefore continues to identify Westhill centre as a Town Centre in the network and seeks to protect this from adverse retail impact. Furthermore it identifies the Tesco/Costco at Endeavour Drive as a Commercial Centre within the network.

Figure 3.11: Westhill



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods			All Goods				
		GFA Sq M	NFA Sq M	Turnover £/Sq M	£m	GFA Sq M	NFA Sq M	Turnover £/Sq M	£m	GFA Sq M	NFA Sq M	Turnover £/Sq M	£m	GFA Sq M	NFA Sq M	Turnover £/Sq M	£m
Retail Goods Shops	13	3300	2051	3582	11.82	1145	736	4582	3.37	0	0	#DIV/0!	0.00	4445	2787	5450	15.19
Retail Services	16													1633			
Vacant	1													0			
Total	30	3300	2051		£11.82m	1145	736		£3.37m	0	0		£0.00m	6078	2787		£15.19m

Year	Recent Changes					Retail Goods Turnover £m	Vitality and Viability Summary		Retail Strategy Summary	
	Conv	Comp	No. of Units Ret Services	Vacant	Total		Centre Classification	Planning Policy Approach	Proposed Retail Floorspace	Proposals
1999	5	6	11	1	23	£15.19m	<p>Above average levels of satisfaction for food shopping (reflecting out of centre supermarkets) but below average satisfaction for comparison goods. High levels of satisfaction for ease of access to the centre. Overall average levels of satisfaction for Westhill town centre as an attractive place to shop.</p> <p>Strengths: Low vacancy rate; ease of movement within centre; environmental quality of centre; significant recent investment in retail in the centre.</p> <p>Vacancies are below national average (6% by number of units in 2013).</p> <p>Weaknesses: Limited retail offer reflecting small size of centre, adverse impacts of traffic on amenity; limited range of facilities and services in centre; limited numbers of multiples.</p> <p>Summary: mixed indicators. The principal weakness is the small size of the centre which limits the vitality of the centre but proposals for investment indicate general commercial strength despite the limited size suggesting reasonable viability.</p>	Town Centre	Endeavour Drive area - Commercial Centre	Town Centre extension - 1200 sq m GFA
2004	4	8	10		22			£13.36m	Protection and promotion of significant new retail floorspace	
2006	4	8	9		21					
2008	5	8	13	6	32					
2013	4	9	16	1	30			14%		

4 Aberdeen City (excluding City Centre)

4.1 The following locations are described in this section:

- Berryden
- Boulevard
- Culter
- Cults
- Danestone
- Dyce
- Garthdee
- Ktitybrewster
- Mastrick
- Middleton Park
- Rosemount
- Rousay Drive
- Torry

Berryden

- 4.2 Berryden is split into two parts – the upper level is identified as a District Centre and the lower level a retail park. Key data for retail provision within the combined area in Figure 4.1 provided at the end of this section.

Overview of Retail Provision

- Berryden District Centre comprises the Sainsbury superstore, 5 small unit shops (including a post office) and two retail warehouse units. Additional units including a chemist and travel agents are located within the Sainsbury store.
- The remaining units which form the retail park include 7 retail warehouse units and a Mecca bingo.
- For the whole of the District Centre/retail park the total retail goods and services floorspace is 24,913 sq m of which 20% is convenience goods, 49% general comparison, 18% bulky goods and 7% retail services and 5% vacant.
- Retail goods turnover is estimated to be £107.7m (2011 prices) with 40% from convenience goods, 48% from general comparison goods and 12% from bulky goods.
- Within the District Centre the Sainsbury is the major anchor store – it accounts for 55% of the turnover of the combined District Centre and retail park.

Retail Proposals

- 4.3 There are no proposals for redevelopment of any part of the Berryden District Centre/retail park. However, the proposed development of land at the Haudegain Triangle, which is located 2.5kms to the north west, could result in trade diversions from the retail warehouse units at Berryden, assuming that this proposal is implemented.

Changes over Time

- 4.4 Since 2004 there have been limited changes in terms of the total retail floorspace within Berryden however there have been changes associated with different retail operators resulting in changes in the balance between general comparison and bulky comparison goods. The most significant change has been associated with a substantial increase in retail turnover – an increase of 41% in real terms since 2004. This increase has been the result of both the shift from bulky goods to general comparison floorspace within the retail park (with consequentially higher sales densities) and also market concentration into larger centres which has benefitted Berryden.

Catchment Area

- 4.5 The catchment area for Berryden District Centre and retail park differs according to types of retail goods.
- 4.6 For convenience goods, which are found in the Sainsbury superstore (i.e. the District Centre) the primary catchment area and secondary catchment area is geographically limited to Zones 26 and 27 for the PCA and Zones 28 and 29N for the SCA. In effect the catchment area for the superstore is the central/western part of

the City. Market penetration rates within both the PCA and SCA are modest with the highest market share identified to be 28% in Zone 27 and significantly lower elsewhere. This reflects the level of choice available to residents for alternative supermarkets and food shops within the City.

- 4.7 In contrast the catchment area for general comparison goods (i.e. primarily the retail park) is very extensive comprising much of the city and large parts of central and northern Aberdeenshire. Market share within this area is low – the highest in Zone 27 at 13% but for much the secondary catchment area it is less than 5%. This would indicate that Berryden’s role for comparison goods shopping is quite limited but for certain types of goods or operators shoppers are drawn from a wide area.
- 4.8 The position with bulky goods is closer to that identified for convenience shopping. The primary and secondary catchment areas are quite limited and confined to the central/western parts of the city and the market share achieved by the centre is low.

Health Check

- 4.9 The nature of Berryden as a District Centre, dominated by a major superstore and retail warehouse units, with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:
- *Range of Retail offer:* the range of shops available within the District Centre and retail park is limited – there are only 11 retail goods shops and these are limited in the types of retail categories that are provided. However the shop units are large and within individual shops (notably the superstore) there is a wide choice of retail goods on sale.
 - *Range of retail and non-retail services:* the only additional services provided are associated with the post office and the bingo leisure unit.
 - *Shopper/household survey information:* above average levels of satisfaction for food shopping and average satisfaction for comparison goods; high levels of satisfaction for ease of access to the centre.
 - *Types of retail operator:* retailing in the centre/retail park is dominated by national multiples with only limited independents.
 - *Pedestrian flows:* information on pedestrian flows is available for 2012.
 - *Vacancy rates:* In 2013 for the whole of Berryden 1 unit was identified as vacant which is 7% by number of units and the vacant floorspace was 5%. This is below average vacancy levels for Scotland.
 - *Environment:* the environment is dominated by car parking and vehicular access – there is also poor integration between the upper (District Centre) and lower (retail park) levels for pedestrians. The building quality is typical of a retail park environment.
- 4.10 Summary: there is limited applicability of indicators to this location. Indicators of viability appear relatively strong whereas the principal weakness is the small number of units that limits the range of facilities, services and goods types available.

Review of Retail Sectors

- 4.11 Within the District Centre/retail park the only convenience goods unit is the superstore which caters well for main food shopping requirements. Berryden is located within the city with the result that there is relatively easy access to other convenience retail facilities including convenience format stores, other specialist independent retailers and other types of convenience retail. However these are not necessarily all available within relatively easy walking or public transport for local residents.
- 4.12 This is also true for comparison goods shopping. Berryden is located quite close to Rosemount which provides a good selection of independent comparison shops and most of the local residential areas have good public transport access to the City Centre which provides an excellent comparison goods retail offer.

Future Prospects

- 4.13 The catchment area served by shops in Berryden varies according to the type of retail goods being considered. For convenience goods the relatively local catchment (which, although geographically small, includes a substantial urban population) available expenditure for convenience goods will grow only modestly. Furthermore new proposals and commitments for convenience floorspace will increase competition for Berryden. As a result convenience turnover growth will be minimal.
- 4.14 In contrast the very wide catchment for comparison goods, combined with significant expenditure growth and long term trends towards market concentration will all support future growth of turnover in comparison goods shops – especially for general comparison goods.
- 4.15 The principal difficulty for Berryden is the constrained site which limits the potential for increases in retail floorspace within or adjacent to the District Centre and/or retail park.

Key Retail Issues and Retail Deficiencies

- 4.16 The principal issues for Berryden are:
- Significant and growing existing market area for general comparison goods but restricted growth for convenience goods.
 - Increased competition from retail proposals – particularly those in west Aberdeen.
 - The limited retail offer within Berryden but difficulties in increasing the range of retail offer.
 - The lack of provision for pedestrians gaining access to Berryden and, in particular, improving circulation within the District Centre and retail park.
 - Lack of land within or adjacent to the District Centre/retail park for future growth.
 - The lack of range of retail offer within the District Centre/retail park.

Proposed Retail Strategy

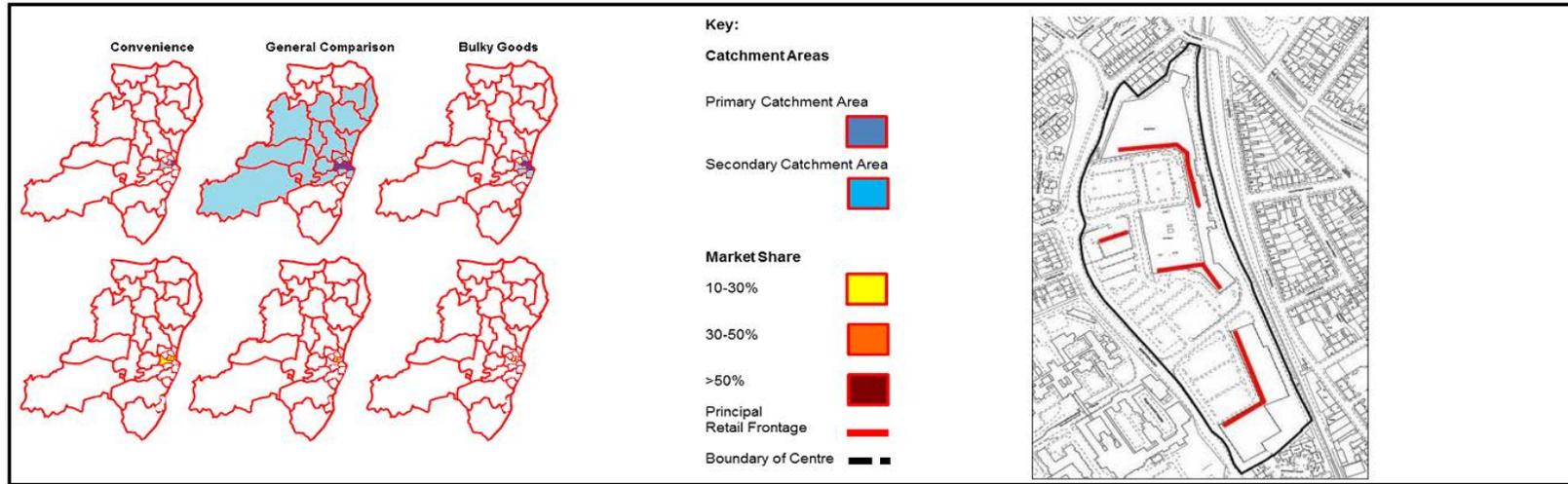
- 4.17 The recommended Retail Strategy proposes:

- Identification of the upper level of Berryden as a **District Centre** in the retail network.
- Identification of the lower level of Berryden (retail park) as a **Commercial Centre** within the retail network.
- Policies to protect Berryden District Centre from adverse impact from retail proposals.

Summary and Conclusions

- 4.18 Berryden comprises two areas – the upper level identified as a District Centre and the lower level identified as a retail park. The turnover of the centre is very high and is one of the highest of all retail locations within the study area. Turnover has grown rapidly since 2004 reflecting the increase in general comparison floorspace within the centre (with reductions in bulky goods floorspace), growth of available expenditure and market concentration. The centre has strong viability but provides limited additional facilities and services apart from shopping and therefore has limited vitality. There are a number of competing pressures affecting future retail growth including competition from new retail locations in west and north Aberdeen and lack of ability for the centre to grow.
- 4.19 The recommended Retail Strategy therefore continues to identify the upper level of Berryden as a District Centre and the lower part as a retail park defined as a Commercial Centre within the retail network.

Figure 4.1: Berryden



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m
Retail Goods Shops	13	5092	3055	8389	42.72	12214	8619	6001	51.72	4446	3176	4169	13.24	21753	14850	7251	107.68
Retail Services	2													1862			
Vacant	1													1299			
Total	16	5092	3055		£42.72m	12214	8619		£51.72m	4446	3176		£13.24m	24913	14850		£107.68m

Year	Recent Changes					Retail Goods Turnover £m	Vitality and Viability Summary	Retail Strategy Summary	
	Conv	Comp	No. of Units Ret Services	Vacant	Total			Centre Classification	Proposed Retail Floorspace Commitments
2004	1	7	2	1	11	£76.15m	<p>The nature of Berryden as a district centre, dominated by a major superstore with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:</p> <p>Above average levels of satisfaction for food shopping and average satisfaction for comparison goods. High levels of satisfaction for ease of access to the centre.</p> <p>Strengths: Low vacancy rate; ease of access by private car; high proportion of multiples.</p> <p>Vacancies are below national average (7% by number of units in 2012).</p> <p>Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking; poor access for pedestrians between supermarket and retail warehouse units.</p> <p>Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.</p>	Upper Level - District Centre Lower Level - Commercial Centre (Retail Park)	
2013	1	12	2	1	16	£107.68m		41%	Protection
								<p>Proposals Potentially affected by new District Centre proposals for north and west of Aberdeen.</p>	

Boulevard

4.20 The Boulevard Retail Park is adjacent to the Beach area, to the east of the City Centre. Key data for retail provision within the retail park is provided in Figure 4.2 provided at the end of this section.

Overview of Retail Provision

- Boulevard Retail Park Centre comprises 11 retail units including two foodstores (Asda superstore and Aldi discount foodstore) and 9 comparison units (comprising both general comparison and bulky goods).
- Within the retail park the total retail goods and services floorspace is 22,644 sq m of which 32% is convenience goods, 32% general comparison and 36% bulky goods. In 2013 there were no retail services or vacant units within the retail park.
- Retail goods turnover is estimated to be £73.7m (2011 prices) with 59% from convenience goods, 26% from general comparison goods and 14% from bulky goods.
- Although the Asda store is estimated to account for 65% of the turnover within the retail park it is not considered to act as an anchor store. This reflects the fact that the retail park was originally developed without a superstore and that its viability as a retail park development is not dependent upon the Asda.

Retail Proposals

4.21 There are no proposals for redevelopment of any part of the Boulevard Retail Park. However, the proposed superstore and comparison floorspace proposals in the north of the City, particularly in Bridge of Don, are likely to adversely affect the turnover of retail units within Boulevard RP.

Changes over Time

4.22 Since 2004 there have been a number of changes that have affected the Boulevard Retail Park. These include:

- Increases in total retail floorspace – according to Regional Assessor data the total retail floorspace in the retail park has increased by 3500 sq m GFA.
- Occupation of existing units by Asda to form a new superstore. Sales densities in Asda are significantly higher than general and bulky comparison floorspace.
- In other retail units a shift from bulky comparison to general comparison floorspace with higher sales densities.

4.23 The retail turnover of the retail park has increased by 150% in real terms since 2004. This reflects the above factors. It also reflects overall growth in available expenditure within its catchment area and that the retail park has benefitted from market concentration.

Catchment Area

- 4.24 The catchment areas for Boulevard RP are identified to be less extensive than other retail park locations (such as lower Berryden) even for general comparison goods.
- 4.25 For convenience goods, which are found in the Asda superstore and Aldi, the primary catchment area and secondary catchment area is geographically limited to Zones 30 and 26. The catchment area appears to primarily run north-south along the eastern edge of the city reflecting the relative ease of transport along the existing arterial routes. In the PCA market share is identified to be only 18% and lower levels are identified elsewhere. This reflects the range of choice for other locations for main food shopping for residents in this part of the city.
- 4.26 As with Berryden the market area served for comparison goods is wider but, because the levels of market penetration are low (significantly lower than Berryden) the effective catchment area is identified to be more limited than Berryden. As a result the PCA and SCA for general comparison goods is identified to be similar to that identified for convenience goods. Market share within these areas is low – identified to be less than 10%.
- 4.27 The position with bulky goods is similar to that identified for general comparison goods.
- 4.28 The market share information for the retail park is significant because it demonstrates that, unlike other retail locations and superstores in Aberdeen the retail units in Boulevard are not as important to residents of a well defined or local area as is the case with other stores in Aberdeen. This, combined with the limited immediate residential catchment, has been an important factor in *not* identifying Boulevard as a District Centre.

Health Check

- 4.29 The nature of Boulevard as a retail park, dominated by a major superstore and retail warehouse units, with no provision through smaller units makes it difficult to apply the concepts of vitality and viability:
- *Range of Retail offer:* the range of shops available within the retail park is limited – there are only 11 retail goods shops and these are limited in the types of retail categories that are provided. However the shop units are large and within individual shops (notably the superstore) there is a wide choice of retail goods on sale.
 - *Range of retail and non-retail services:* there are no significant additional services provided.
 - *Shopper/household survey information:* Above average levels of satisfaction for food shopping and average satisfaction for comparison goods. High levels of satisfaction for ease of access to the centre. Overall above average levels of satisfaction for Boulevard RP as an attractive place to shop.
 - *Types of retail operator:* retailing in the centre/retail park is dominated by national multiples with no independents.
 - *Pedestrian flows:* information is available on pedestrian flows is available for 2012.

- *Vacancy rates:* In 2013 there were no vacant units. This is well below average vacancy levels for Scotland.
- *Environment:* the environment is dominated by car parking and vehicular access. The building quality is typical of a retail park environment.

4.30 Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.

Review of Retail Sectors

4.31 Within the retail park there are two convenience goods units which are the superstore and discount foodstore. Boulevard is located within the city with the result that there is relatively easy access to other convenience retail facilities including convenience format stores, other specialist independent retailers and other types of convenience retail. However these are not necessarily all available within relatively easy walking distance or public transport for local residents.

4.32 This is also true for comparison goods shopping. Boulevard is located close to the City Centre which provides an excellent comparison goods retail offer.

Future Prospects

4.33 The catchment area served by shops in Boulevard is not identified to benefit from significant population growth. As a result no growth in available expenditure for convenience goods is identified and growth for comparison goods expenditure is more limited than other areas (growth identified to be in the region of 10-15% between 2013 and 2027). Furthermore new proposals and commitments for convenience floorspace in the north of the City will result in some trade diversion from shops in Boulevard – particularly for convenience goods shops. As a result convenience turnover growth will be minimal.

4.34 For comparison goods although new retail floorspace is proposed elsewhere in the city including the City Centre the growth in available expenditure is expected to result in further limited growth in retail turnover for general comparison and bulky goods (assuming that the same types of operators occupy space in the retail park).

4.35 Within the retail park itself there is limited opportunity for the provision of new retail floorspace. However there is land to the east in the existing leisure park that has been proposed for new retail units and this could extend the range of retail provided in this locality. This would, however, be an out-of-centre location.

Key Retail Issues and Retail Deficiencies

4.36 The principal issues for Boulevard are:

- No growth in convenience turnover and relatively limited growth in comparison goods available expenditure.
- Increased competition from retail proposals – particularly those in north Aberdeen.

- The limited retail offer within Boulevard but difficulties in increasing the range of retail offer.
- The lack of provision for pedestrians gaining access to Boulevard reflecting its design as a retail park.
- Lack of land within the retail park for future growth.
- The lack of range of retail offer and other services within the retail park.

Proposed Retail Strategy

4.37 The recommended Retail Strategy proposes:

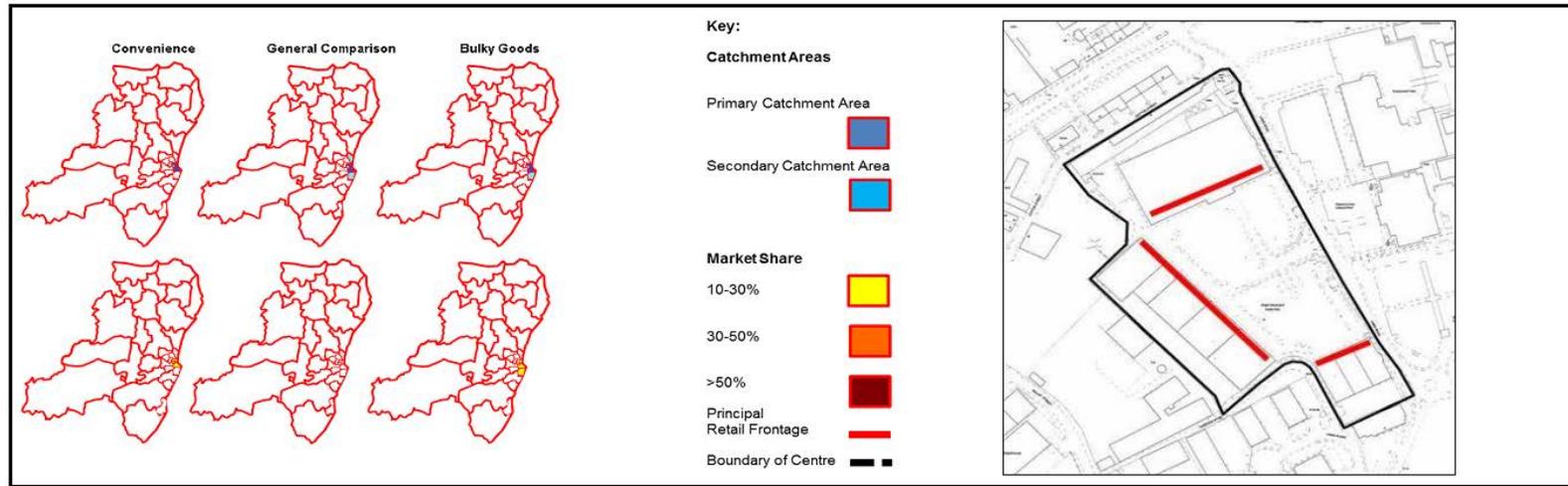
- Identification of Boulevard Retail Park as a **Commercial Centre** within the retail network.

Summary and Conclusions

4.38 Boulevard Retail Park is a purpose built retail park located to the east of the City Centre. Turnover has grown rapidly since 2004 reflecting the change in retail operators including a new Asda superstore and a shift in the remaining floorspace from bulky goods to general comparison floorspace with higher sales densities. The centre has strong viability but does not provide additional facilities and services apart from shopping and therefore does have limited vitality. There are a number of competing pressures affecting future retail growth including competition from new retail locations in north Aberdeen and lack of ability for the centre to grow.

4.39 The recommended Retail Strategy therefore identifies the Boulevard Retail Park as a Commercial Centre within the retail network.

Figure 4.2: Boulevard RP



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	11	7175	4253	6091	43.70	7325	4833	4009	19.38	8144	5925	1783	10.57	22844	15012	4906	73.65
Retail Services	0													0			
Vacant	0													0			
Total	11	7175	4253		£43.70m	7325	4833		£19.38m	8144	5925		£10.57m	22844	15012		£73.65m

Recent Changes						Retail Goods Turnover £m		Vitality and Viability Summary		Retail Strategy Summary	
Year	Conv	Comp	No. of Units Ret Services	Vacant	Total					Centre Classification	Commercial Centre (Retail Park)
2004	0	20			20	£29.42m		The nature of Boulevard as a retail park, dominated by a major superstore and retail warehouse units, with no provision through smaller units makes it difficult to apply the concepts of vitality and viability;		Planning Policy Approach	
2013		11	0	0	11	£73.65m	150%	Above average levels of satisfaction for food shopping and average satisfaction for comparison goods. High levels of satisfaction for ease of access to the centre. Overall above average levels of satisfaction for Boulevard RP as an attractive place to shop. Strengths: Very low vacancy rate; ease of access by private car; high proportion of multiples. No vacancies in 2012. Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking; poor access for pedestrians between supermarket and retail warehouse units. Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.		Proposed Retail Floorspace	
										Commitments	
										Proposals	

Culter

4.40 Culter centre is a small retail location with a discontinuous series of retail and retail service units on both sides of North Deeside Road in the centre of Peterculter. Key data for retail provision within the centre is provided in Figure 4.3 provided at the end of this section.

Overview of Retail Provision

- The centre comprises 22 retail and retail service units including 4 small convenience goods shops, 5 comparison goods shops, 11 retail service units and one vacant unit.
- For the centre the total retail goods and services floorspace is 2227 sq m GFA of which 34% is convenience goods, 13% general comparison, 4% bulky goods, 45% retail services and 3% vacant.
- Retail goods turnover is estimated to be £2.6m (2011 prices) with 66% from convenience goods, 31% from general comparison goods and only 3% from bulky goods.
- There is no single large unit within the centre which can be described as an anchor store.

Retail Proposals

4.41 There are no proposals for redevelopment of any part of the Culter centre. However proposals for new retail floorspace in west Aberdeen could be located relatively close to Culter but, because of the local character of shops in Culter, it is not expected this new floorspace will have any significant impact on the Centre.

Changes over Time

4.42 Separate information for Culter was not included within the 2004 retail study and so it is not possible to identify changes since 2004.

Catchment Area

4.43 The catchment area for Culter is limited. Although the retail model identifies this to be Zone 19 it is evident that the catchment is limited to the community of Peterculter although shops do benefit from some pass by traffic travelling along North Deeside Road. The same catchment characteristics apply to all retail goods types.

Health Check

4.44 The small size of Culter centre makes it difficult to apply conventional concepts of vitality and viability. The centre has a limited retail offer but does provide a range of additional services and facilities (such as village hall, church, library and so on). The vacancy rate is less than 5% measured both by number of units and floorspace – this is well below Scottish average levels of vacancies.

4.45 The centre comprises attractive buildings but traffic along the main road can, at times, be busy, limiting ease of access for pedestrians trying to cross from one side to the other and the traffic also affects pedestrian amenity.

Review of Retail Sectors

- 4.46 The centre only provides a limited retail offer. For convenience goods there are two specialist independent retailers and two convenience format shops. For comparison goods shops there is a limited range of types of shops with no choice in any categories.
- 4.47 The overall characteristics of the centre, which serves local top-up shopping needs only, together with a limited range of additional services, is typical of a Local Centre serving the local community.

Future Prospects

- 4.48 The future prospects for shops in Culter reflect a combination of: local population growth in Peterculter; general expenditure growth – particularly for comparison goods; major housing allocations at Countesswells and elsewhere; major new retail floorspace proposed for west Aberdeen; and pressure for market concentration. Taking these factors together it is estimated that turnover up to 2017 will remain broadly flat in retail terms and thereafter it is expected that there will be very limited growth.

Key Retail Issues and Retail Deficiencies

- 4.49 The principal issues for Culter are:
- Very limited growth in turnover in the long term.
 - Limited retail offer – primarily serving local walk-in trade from the surrounding community.
 - Issues associated with pedestrian movement across the North Deeside Road.

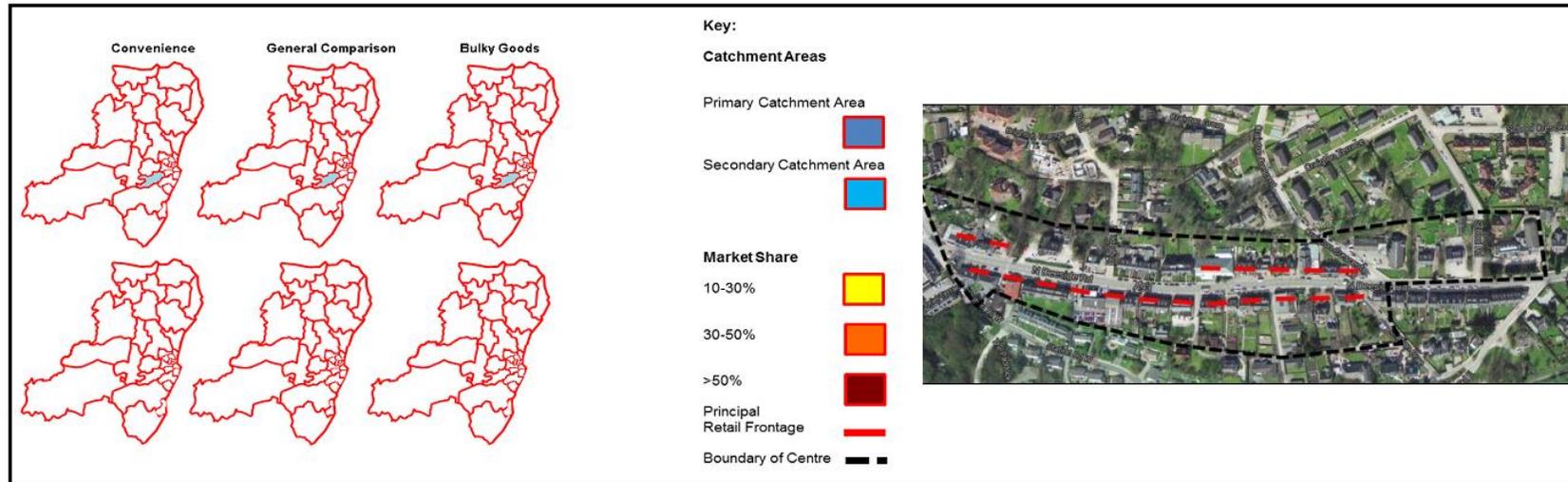
Proposed Retail Strategy

- 4.50 The recommended Retail Strategy proposes:
- Identification of the Culter as a **Local Centre** within the retail network.
 - Protection of the centre from adverse retail impact from retail development proposals.

Summary and Conclusions

- 4.51 Culter centre is a small Local Centre that serves top-up and local shopping needs of residents in Peterculter. The retail offer is limited but the centre does provide additional non-retail services of importance to the community. Insofar as vitality and viability indicators apply to the centre it demonstrates good levels of vitality and viability but these must be considered in terms of the small nature of the centre. There are a number of competing pressures affecting the centre with the result that future turnover is expected to remain broadly flat in future years with only modest growth in the long term.
- 4.52 The recommended Retail Strategy therefore identifies the centre as a **Local Centre** in the retail network.

Figure 4.3: Culter



Floorspace and Turnover 2013

	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	10	766	498	2232	1.71	297	193	4201	0.81	99	64	1308	0.08	1163	756	3449	2.61
Retail Services	11													1001			
Vacant	1													63			
Total	22	766	498		£1.71m	297	193		£0.81m	99	64		£0.08m	2227	756		£2.61m

Year	Recent Changes					Retail Goods Turnover £m	Vitality and Viability Summary	Retail Strategy Summary	
	Conv	Comp	No. of Units Ret Services	Vacant	Total			Centre Classification	Local Centre
2013	4	6	11	1	22	£2.61m	The small scale of the centre limits the applicability of indicators of vitality and viability. The centre has a limited retail offer and limited additional facilities. Vacancy levels in 2012 were <5% by number of units.	Protection	
								Proposed Retail Floorspace	
								Commitments	
								Proposals	

Cults

- 4.53 Cults centre is a small retail location mostly on the south side of the North Deeside Road in the centre of Cults. Key data for retail provision within the centre is provided in Figure 4.4 provided at the end of this section.

Overview of Retail Provision

- The centre comprises 31 retail and retail service units including 3 small convenience goods shops, 11 comparison goods shops, 15 retail service units and 2 vacant units.
- For the centre the total retail goods and services floorspace is 1936 sq m GFA of which 16% is convenience goods, 45% general comparison, 1% bulky goods, 45% retail services and 8% vacant.
- Retail goods turnover is estimated to be £6.2m (2011 prices) with 36% from convenience goods, 62% from general comparison goods and only 2% from bulky goods.
- There is no single large unit within the centre which can be described as an anchor store. However the Tesco Express and Costcutter stores are important convenience-format stores.

Retail Proposals

- 4.54 There are no proposals for redevelopment of any part of the Cults centre. However proposals for new retail floorspace in west Aberdeen could be located relatively close to Cults but, because of the local character of shops in Cults, it is not expected this new floorspace will have any significant impact on the Centre.

Changes over Time

- 4.55 Separate information for Cults was included within the retail study in 2004 and this identifies the following changes:
- Increase in retail goods shops from 13 to 14 units but a reduction in retail services from 19 to 15. Total number of retail and retail service units has therefore reduced from 34 to 31 units.
 - The amount of convenience floorspace has halved since 2004 – from 1551 sq m to 756 sq m GFA but the amount of comparison floorspace has increased - from 823 sq m to 2223 sq m.
 - Total turnover has increased substantially from £4.7m to £6.2m and increase of 30%.

Catchment Area

- 4.56 The catchment area for Cults is limited. Although the retail model identifies this to be Zone 29S it is evident that the catchment is limited to the community of Cults and Bielside although shops do benefit from some pass by traffic travelling along North Deeside Road. The same catchment characteristics apply to all retail goods types.

Health Check

- 4.57 The small size of Cults centre makes it difficult to apply conventional concepts of vitality and viability. The centre has a limited retail offer but does provide some additional services and facilities (such as nursery, clinics and dentist). The vacancy rate is less than 7% measured by number of units and 8% by floorspace – this is below the Scottish average levels of vacancies.
- 4.58 The centre comprises purpose built retail units but traffic along the main road can, at times, be busy, limiting ease of access for pedestrians trying to cross from one side to the other and the traffic also affects pedestrian amenity.

Review of Retail Sectors

- 4.59 The centre only provides a limited retail offer. For convenience goods there are three convenience format shops and no specialist independents. For comparison goods shops there is a limited range of types of shops with no choice in any categories.
- 4.60 The overall characteristics of the centre, which serves local top-up shopping needs only, together with a limited range of additional services is typical of a Local Centre serving the local community.

Future Prospects

- 4.61 The future prospects for shops in Cults reflect a combination: of local population growth in Cults; general expenditure growth – particularly for comparison goods; major housing allocations at Countesswells and elsewhere; major new retail development in west Aberdeen; and pressure for market concentration. Taking these factors together it is estimated that turnover up to 2017 will slightly decline and then recover back to 2013 levels by 2022 with slow growth thereafter.

Key Retail Issues and Retail Deficiencies

- 4.62 The principal issues for Cults are:
- Very limited growth in turnover in the long term.
 - Limited retail offer – primarily serving local walk-in trade from the surrounding community.
 - Issues associated with pedestrian movement across the North Deeside Road.

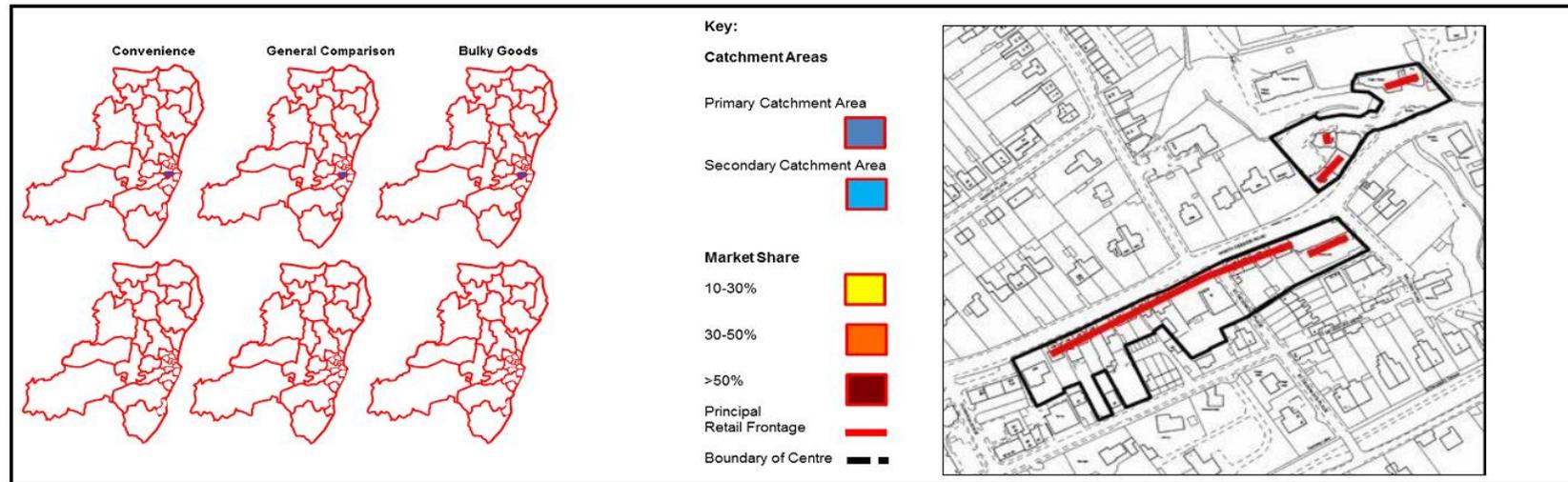
Proposed Retail Strategy

- 4.63 The recommended Retail Strategy proposes:
- Identification of the Cults as a **Local Centre** within the retail network.
 - Protection of the centre from adverse retail impact from retail development proposals.

Summary and Conclusions

- 4.64 Cults centre is a small Local Centre that serves top-up and local shopping needs of residents in Cults and Bielside. The retail offer is limited but the centre does provide additional non-retail services of importance to the community. It demonstrates good levels of vitality and viability but these must be considered in terms of the small nature of the centre. There are a number of competing pressures affecting the centre with the result that future turnover is expected to remain broadly flat in future years with only modest growth in the long term.
- 4.65 The recommended Retail Strategy therefore identifies the centre as a **Local Centre** in the retail network.

Figure 4.4: Cults



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	14	756	492	2969	2.25	2175	1414	2699	3.82	48	31	3715	0.11	2979	1936	3189	6.18
Retail Services	15													1406			
Vacant	2													401			
Total	31	756	492	£2.25m	2175	1414	£3.82m	48	31	£0.11m	4786	1936	£6.18m				

Year	Recent Changes					Retail Goods Turnover £m	Vitality and Viability Summary	Retail Strategy Summary	
	Conv	Comp	No. of Units Ret Services	Vacant	Total			Centre Classification	Local Centre
2004	3	10	19	2	34	£4.74m	The small scale of the centre limits the applicability of indicators of vitality and viability. The centre has a limited retail offer and limited additional facilities. Vacancy levels in 2012 were 7% by number of units.	Centre Classification	Local Centre
2013	3	11	15	2	31	£6.18m		Planning Policy Approach	Protection
						30%		Proposed Retail Floorspace	
								Commitments	
								Proposals	

Danestone

- 4.66 Danestone comprises the Tesco superstore with a small number of separate retail service units included within the entrance area to the superstore. Key data for retail provision within the combined area is provided in Figure 4.5 at the end of this section.

Overview of Retail Provision

- Danestone comprises the Tesco superstore and 4 small units for retail services. The Tesco superstore includes a range of services and facilities including opticians, pharmacy and café. The separate small units comprise café, hairdressing/beauty (2 no.) and a travel agents.
- For the whole of the District Centre the total retail goods and services floorspace is 13,919 sq m of which 49% is convenience goods, 39% general comparison, 10% bulky goods and 3% retail services with no vacant floorspace at time of survey.
- Retail goods turnover is estimated to be £76.9m (2011 prices) with 69% from convenience goods, 27% from general comparison goods and 4% from bulky goods.
- Within the District Centre Tesco is dominant – without this store trading there would not be any effective District Centre.

Retail Proposals

- 4.67 There are no proposals for redevelopment of any part of Danestone District Centre. However there are a number of proposals in the north and west of Aberdeen that will result in trade diversion. These include:
- Convenience and comparison floorspace, including superstore, granted planning permission at Denmore Road.
 - Proposals for new centres to serve major housing allocations at Grandholme and Newhills.
- 4.68 It should be noted that the proposals for Grandholme and Newhills include substantial numbers of new housing.

Changes over Time

- 4.69 Since 2004 there has been a redevelopment of part of the retail centre with a net increase in retail floorspace identified from Regional Assessor records. Within this there has also been a shift in balance in the type of retail:
- The total retail floorspace has *increased* from 10,647 sq m to 13,740 sq m
 - The total convenience floorspace has *decreased* slightly from 7118 sq m to 6771 sq m but comparison floorspace has increased significantly from 3249 sq m to 6699 sq m GFA.

- Turnover has, however, only increased marginally – 2% growth identified from 2004. Convenience turnover has declined significantly whereas comparison turnover has grown significantly.

4.70 The key factor in these changes has been the growth in convenience floorspace in Aberdeenshire which has reduced expenditure from Aberdeenshire to Danestone (the most significant impact has been the Tesco stores at Ellon and expansion of the Inverurie store). But this has been counter balanced by growth in comparison goods expenditure which has been served by the increase in comparison floorspace.

Catchment Area

4.71 The catchment area for Danestone varies according to types of retail goods.

4.72 For convenience goods, which are found in the Tesco superstore (i.e. the District Centre) the primary catchment area comprises Zones 25 and 26 (i.e. north Aberdeen) with the secondary catchment including 24S, 23 and 14 – i.e. the trade draw from Aberdeenshire is limited only to those parts closest to north Aberdeen. Within the PCA market share is reasonably high – in the region of 30-45% and lower in the secondary catchment area. Compared to 2004 market share in Aberdeenshire Zones has significantly declined.

4.73 The catchment area for general comparison goods is more restricted being more restricted to Zones 23, 25 and 24S (i.e. north and north west Aberdeen). Market share within this area is general modest (the highest is 20% in Zone 25).

4.74 The position with bulky goods is similar to that identified for general comparison goods but market share is lower – no higher than 12% which is identified for Zone 25 (i.e. the PCA).

4.75 The high level of market share within the primary catchment area, particularly for convenience goods, would indicate that this location serves a District Centre function for this part of north Aberdeen. This has been an important factor in continuing to identify Danestone as a District Centre.

Health Check

4.76 The nature of Danestone as a District Centre, dominated by a major superstore, with limited provision through smaller units, makes it difficult to apply the concepts of vitality and viability:

- *Range of Retail offer:* the range of shops available within the District Centre is very limited – but it should be noted that the range of goods within the superstore is extensive.
- *Range of retail and non-retail services:* only limited additional services are provided within the centre.
- *Shopper/household survey information:* Above average levels of satisfaction for food shopping and slightly below average satisfaction for comparison goods. High levels of satisfaction for ease of access to the centre. Overall average satisfaction with the centre as an attractive place to shop.
- *Types of retail operator:* retailing in the centre is dominated by a single national multiple with only limited independents.

- *Pedestrian flows:* information is available on pedestrian flows is available for 2012.
- *Vacancy rates:* In 2013 no vacancies were identified – this is well below average vacancy levels for Scotland.
- *Environment:* the environment is dominated by car parking and vehicular access – there is also poor integration between centre and surrounding residential areas. The building quality is typical of a retail superstore.

4.77 Summary: there is limited applicability of indicators to this location. Indicators of viability appear relatively strong whereas the principal weakness is the small number of units that limits the range of facilities, services and goods types available.

Review of Retail Sectors

4.78 Within the District Centre the only convenience goods unit is the superstore which caters well for main food shopping requirements. Danestone is located within the city with the result that there is relatively easy access to other convenience retail facilities including convenience format stores, other specialist independent retailers and other types of convenience retail. However these are not necessarily all available within relatively easy walking or public transport for local residents.

4.79 This is also true for comparison goods shopping. Although the northern part of the City (Bridge of Don area) has limited provision for retailing (it is confined to, primarily, superstores and retail warehouse units for bulky goods) there is reasonably good access to other parts of the city – especially to the City Centre which provides an excellent comparison goods retail offer.

Future Prospects

4.80 Although Danestone is located close to the Grandholme area which has substantial numbers of new housing proposed it will be affected adversely by existing retail commitments and proposals for a new District Centre to serve Grandholme. Similarly it could be affected by proposals in the Newhills/Bucksburn area. Therefore, despite growth in available expenditure in the wider area the turnover of Danestone is expected to decline through to 2022 although thereafter it is expected to recover. The significance of these impacts is difficult to assess because this will depend upon the precise proposals for Grandholme, Newhills and Denmore Road.

Key Retail Issues and Retail Deficiencies

4.81 The principal issues for Danestone are:

- Significant market growth but also major new floorspace proposals in north Aberdeen increasing competition.
- The limited retail offer within Danestone. The current layout of the centre would indicate that the expansion of retail offer would only be possible with the expansion of the existing Tesco store.
- The lack of provision for pedestrians gaining access to Danestone.

- The lack of range of retail offer within the District Centre.

Proposed Retail Strategy

4.82 The recommended Retail Strategy proposes:

- Identification of Danestone as a **District Centre** in the retail network.
- Policies to protect Danestone District Centre from adverse impact from retail proposals.

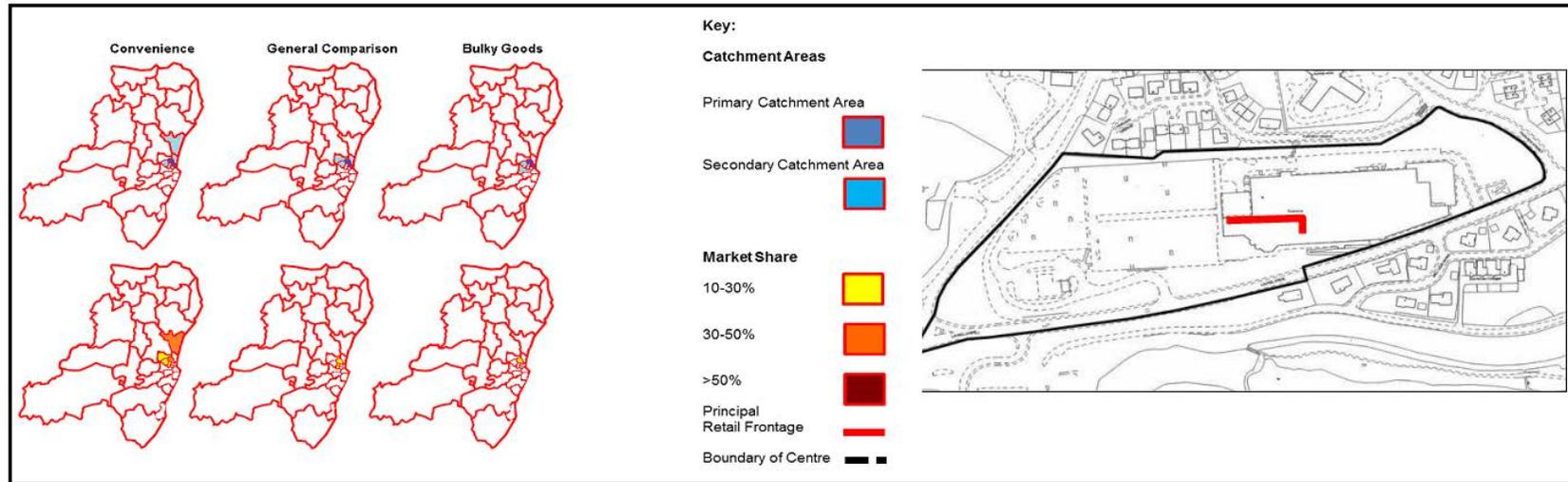
Summary and Conclusions

4.83 Danestone is identified as a District Centre in the proposed retail strategy. However it is clear that Danestone does not conform to conventional notions of a District Centre in that it is dominated by a single shop and has only a very limited range of non-retail facilities and services. Danestone does have an important local role and this is seen in relatively high levels of market share within Zone 25 and this, together with limited alternative provision within this part of Aberdeen have been important factors in the identification of the Danestone as a District Centre.

4.84 The centre faces a number of important issues. Although it is located adjacent to an area of substantial housing and population growth the proposed new centres to serve this growth and existing retail commitments are expected to result in a *decline* in retail turnover in Danestone over the next 5-15 years. The centre also suffers from lack of pedestrian linkages to the surrounding residential areas.

4.85 The recommended Retail Strategy therefore continues to identify Danestone as a District Centre within the retail network.

Figure 4.5: Danestone



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	3	6771	4401	7894	53.45	5368	3489	5861	20.45	1331	865	3495	3.02	13470	8756	8786	76.93
Retail Services	5													449			
Vacant	0													0			
Total	8	6771	4401		£53.45m	5368	3489		£20.45m	1331	865		£3.02m	13919	8756		£76.93m

Year	Recent Changes					Retail Goods Turnover £m	Retail Strategy Summary
	Conv	Comp	No. of Units Ret Services	Vacant	Total		
2004	1	1	3	0	5	£75.40m	<p>Centre Classification District Centre</p> <p>Planning Policy Approach Protection</p> <p>Proposed Retail Floorspace Potentially affected by new District Centre proposals for north and west of Aberdeen.</p> <p>Commitments</p> <p>Proposals</p>
2013	2	1	5	0	8	£76.93m	

Vitality and Viability Summary

The nature of Danestone as a district centre, dominated by a major superstore with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:

Above average levels of satisfaction for food shopping and slightly below average satisfaction for comparison goods. High levels of satisfaction for ease of access to the centre. Overall average satisfaction with the centre as an attractive place to shop.

Strengths: No vacancies; ease of access by private car. No vacancies identified in 2012.

Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking.

Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.

Dyce

- 4.86 Dyce comprises the Asda superstore with a small number of separate retail service units included within the shopping centre adjacent to the store. Key data for retail provision within this area is provided in Figure 4.6 provided at the end of this section.

Overview of Retail Provision

- Dyce comprises the Asda superstore and 11 other retail and retail service units. The separate small units comprise three comparison goods shops, five retail service units and two vacant units.
- For the whole of the District Centre the total retail goods and services floorspace is 10,268 sq m of which 47% is convenience goods, 37% general comparison, 9% bulky goods, 4% retail services and 4% vacant at time of survey.
- Retail goods turnover is estimated to be £49.0m (2011 prices) with 68% from convenience goods, 27% from general comparison goods and 5% from bulky goods.
- Within the District Centre Asda is dominant – without this store trading there would not be any effective District Centre.

Retail Proposals

- 4.87 There are no proposals for redevelopment of any part of Dyce District Centre. However there are a number of proposals in the north and west of Aberdeen that will result in trade diversion. These include:
- Convenience and comparison floorspace, including superstore, granted planning permission at Denmore Road.
 - Proposals for new centres to serve major housing allocations at Grandholme and Newhills.

- 4.88 It should be noted that the proposals for Grandholme and Newhills include substantial numbers of new housing units

Changes over Time

- 4.89 According to Regional Assessor records there have been significant changes in retail provision within Dyce centre. This has reflected growth of the Asda store (including the occupation of units previously operated by other businesses). There has also been a shift in balance in the type of retail:
- The total retail floorspace has *increased* from 8014 sq m to 10268 sq m
 - The total convenience floorspace has increased marginally from 4627 sq m to 4778 sq m but comparison floorspace has increased significantly from 2896 sq m to 4742 sq m GFA.
 - Turnover has, however, only increased slightly – 10% growth identified from 2004. Convenience turnover has declined from £36.5m to £33.3m whereas comparison turnover has grown significantly.

4.90 These changes mirror those identified for Danstone and the same factors have been affecting Dyce as identified for Danestone. The key factor in these changes has been the growth in convenience floorspace in Aberdeenshire which has reduced expenditure from Aberdeenshire to Dyce (the most significant impact has been the Tesco stores at Ellon and expansion of the Inverurie store). But this has been counter balanced by growth in comparison goods expenditure which has been served by the increase in comparison floorspace.

Catchment Area

4.91 The catchment area for Dyce is generally similar for all types of retail goods floorspace.

4.92 The primary catchment area comprises Zones 24N (i.e. Dyce), 24S (Bucksburn area) and also Zone 15 (i.e. that part of Aberdeenshire to the north west of Aberdeen City). The secondary catchment area is identified to be Zone 25 and other parts of north/west Aberdeen. There is some slight variation with general comparison and bulky goods but the catchment areas are broadly similar.

4.93 Market share of the store within the primary catchment area is high for convenience goods – approximately 40% - 55% in Zones 24N and 24S and also over 30% in Zone 15. In other zones in north and west Aberdeen market share is identified to be in the range of 5% to 20%. Compared to 2004 market share in Aberdeenshire Zones has significantly declined.

4.94 Market share for comparison goods is much lower – in the region of 8-12% in the prime catchment area but much lower elsewhere.

4.95 The high level of market share within the primary catchment area, particularly for convenience goods, would indicate that this location serves a District Centre function for this part of north Aberdeen (especially the Dyce area). This has been an important factor in continuing to identify Dyce as a District Centre.

Health Check

4.96 The nature of Dyce as a District Centre, dominated by a major superstore, with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:

- *Range of Retail offer:* the range of shops available within the District Centre is very limited – but it should be noted that the range of goods within the superstore it is extensive.
- *Range of retail and non-retail services:* only very limited additional services are provided within the centre – dentist and library.
- *Shopper/household survey information:* Above average levels of satisfaction for food shopping and below average satisfaction for comparison goods. Good to very good levels of satisfaction for ease of access to the centre and car parking. Overall average satisfaction with the centre as an attractive place to shop.
- *Types of retail operator:* retailing in the centre is dominated by a single national multiple with only limited independents.
- *Pedestrian flows:* information on pedestrian flows is available for 2012.

- *Vacancy rates:* In 2013 2 vacant units were identified – this is 17% by number of vacancies but only 4% by floorspace. This shows that the vacant units are quite small. Although small the vacant units are quite prominent and so have a disproportionate effect on the appearance of the centre.
- *Environment:* the environment is dominated by car parking and vehicular access – there are reasonably pedestrian links between the centre and surrounding residential areas. The building quality is typical of its age but does not present a particularly attractive external appearance.

4.97 Summary: there is limited applicability of indicators to this location. Indicators of viability appear relatively strong whereas the principal weakness is the small number of units that limits the range of facilities, services and goods types available and the impact that the vacant units have on the appearance of the centre.

Review of Retail Sectors

4.98 Within the District Centre the only convenience goods unit is the superstore which caters well for main food shopping requirements. Dyce is located within the city with the result that there is relatively easy access to other convenience retail facilities (particularly along Victoria Street in Dyce) including convenience format stores, other specialist independent retailers and other types of convenience retail. However these are not necessarily all available within relatively easy walking or public transport for local residents.

4.99 This is also true for comparison goods shopping. Although the northern part of the City has limited provision for retailing (it is confined to, primarily, superstores and retail warehouse units for bulky goods) there is reasonably good access to other parts of the city – especially to the City Centre which provides an excellent comparison goods retail offer.

Future Prospects

4.100 Although Dyce is located close to the Newhills and Grandholme areas which have substantial numbers of new housing proposed it will be affected adversely by existing retail commitments and proposals for new District Centres to serve these two expansion areas. Therefore, despite growth in available expenditure in the wider area the turnover of Dyce is expected to decline through to 2022 although thereafter it is expected to recover. The significance of these impacts is difficult to assess because this will depend upon the precise proposals for Grandholme, and Newhills.

Key Retail Issues and Retail Deficiencies

4.101 The principal issues for Dyce are:

- Significant market growth but also major new floorspace proposals in north and west Aberdeen increasing competition.
- The limited retail offer within Dyce. The current layout of the centre would indicate that it would be possible to expand the centre should this be supported by demand.
- The lack of range of retail offer within the District Centre and the limited range of non-retail services within the centre.

Proposed Retail Strategy

4.102 The recommended Retail Strategy proposes:

- Identification of Dyce as a **District Centre** in the retail network.
- Policies to protect Dyce District Centre from adverse impact from retail proposals.

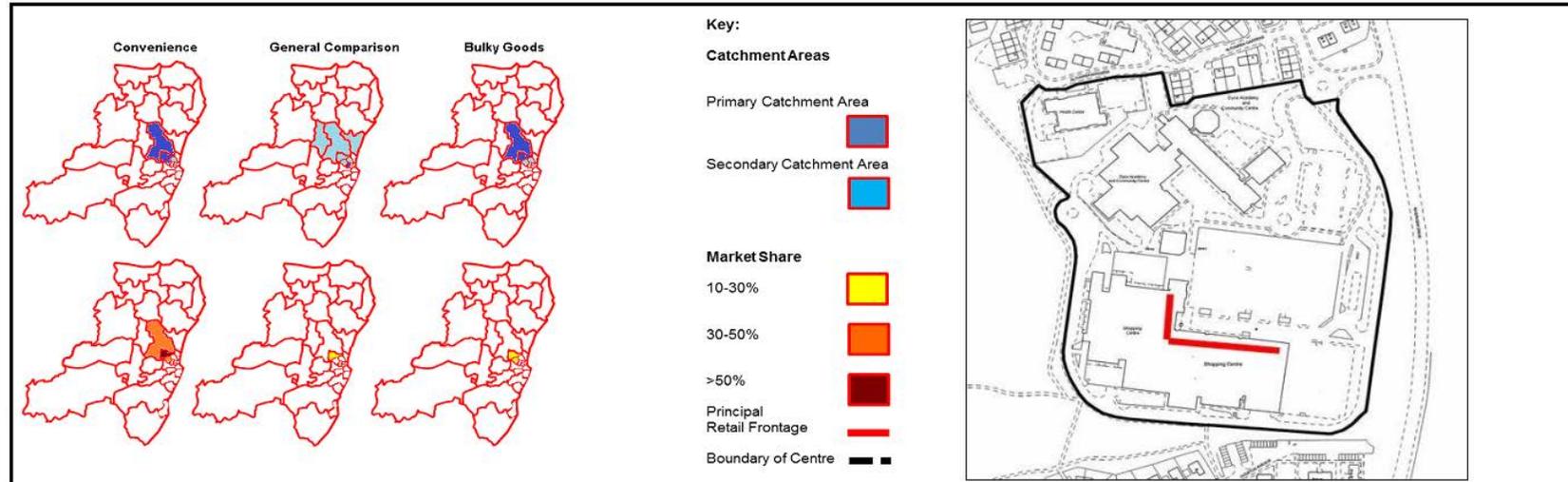
Summary and Conclusions

4.103 Dyce is identified as a District Centre in the proposed retail strategy. However it is clear that Dyce does not conform to conventional notions of a District Centre in that it is dominated by a single shop and has only a very limited range of non-retail facilities and services. Dyce does have an important local role and this is seen in high levels of market share within Zone 24N and 24S and this, together with limited alternative provision within this part of Aberdeen have been important factors in the identification of the Dyce as a District Centre.

4.104 The centre faces a number of important issues. Although it is located to an area of substantial housing and population growth the proposed new centres to serve this growth and existing retail commitments are expected to result in a *decline* in retail turnover in Dyce over the next 5-15 years.

4.105 The recommended Retail Strategy therefore continues to identify Dyce as a District Centre within the retail network.

Figure 4.6: Dyce



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	5	4778	2637	6975	33.33	3786	2162	6079	13.15	944	528	4721	2.49	9508	5328	9190	48.97
Retail Services	5													373			
Vacant	2													387			
Total	12	4778	2637		£33.33m	3786	2162		£13.15m	944	528		£2.49m	10268	5328		£48.97m

Recent Changes							Retail Goods Turnover £m		Vitality and Viability Summary		Retail Strategy Summary	
Year	Conv	Comp	No. of Units		Total					Centre Classification		
			Ret Services	Vacant						Planning Policy Approach		
2004	2	9	1	2	14	£44.69m				Protection		
2013	2	3	5	2	12	£48.97m						
						10%						

The Vitality and Viability Summary text is as follows:

The nature of Dyce as a district centre, dominated by a major superstore with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:

Above average levels of satisfaction for food shopping and below average satisfaction for comparison goods. Good to very good levels of satisfaction for ease of access to the centre and car parking. Overall average satisfaction with the centre as an attractive place to shop.

Strengths: Two vacant units (20% by number of units but <5% by area of floorspace); ease of access by private car.

Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking.

Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.

The Retail Strategy Summary text is as follows:

Centre Classification: District Centre

Proposed Retail Floorspace Commitments:

Proposals: Potentially affected by new District Centre proposals for north and west of Aberdeen.

Garthdee

4.106 Garthdee comprises 5 large format retail units – two superstores and three retail warehouse units. Key data for retail provision within the combined area in Figure 4.7 provided at the end of this section.

Overview of Retail Provision

- Garthdee comprises the Asda and Sainsbury superstores and three other large units: Currys/PC World, B&Q and Boots. There are no separate small retail or retail service units. Within the Asda store there is an opticians and photo processing facilities as well as café. Within the Sainsbury superstore are additional services including dry cleaning, key cutting, photo processing and travel agents.
- For the whole of the Garthdee retail area the total retail goods and services floorspace is 34,892 sq m of which 29% is convenience goods, 30% general comparison, 40% bulky goods. The retail services described in the superstores have been included within the retail goods for these stores. There was no vacant retail floorspace at the time of survey.
- Retail goods turnover is estimated to be £156.3m (2011 prices) which is the second highest turnover of any retail location within Aberdeen and Aberdeenshire (the highest is the City Centre). 71% of retail turnover is from convenience goods, 16% from general comparison goods and 13% from bulky goods.
- Although the Asda superstore accounts for half of the turnover at Garthdee all five stores are major retail operations. None could be described as an anchor for retailing in this location.

Retail Proposals

4.107 There are no proposals for redevelopment of any part of Garthdee. However there are a number of proposals in the west and south of Aberdeen that will result in trade diversion. These include:

- New retail floorspace to serve west Aberdeen.
- New centre to serve the new town of Elsick.
- Allocation of land for new superstore at Souter Head Road, Cove.

Changes over Time

4.108 According to Regional Assessor records there have been significant changes in retail provision within Garthdee. This has reflected growth of the Asda. There has also been a shift in balance in the type of retail:

- The total retail floorspace has *increased* from 28,165 sq m to 34,892 sq m
- The total convenience floorspace has decreased marginally from 10,542 sq m to 10,164 sq m but comparison floorspace has increased significantly from 17,236 sq m to 24,718 sq m GFA.

- Turnover has, however, declined – particularly for comparison goods. This change is unexpected and may reflect increased choice in retail offer elsewhere in Aberdeen (including the City Centre) or other factors making Garthdee less attractive as a place to shop.

Catchment Area

- 4.109 The catchment area for Garthdee is broadly similar for both convenience and comparison goods. The Primary Catchment Area comprises Zones 29S (Garthdee area) and Zone 30 (City Centre area). The secondary catchment area is identified primarily to the west and south – Zones 19 (Culter and Banchory) , 20E and 20W (Newtonhills and Elsick), 31 (Portlethen) and 32 (Cove).
- 4.110 For convenience goods market penetration rates are relatively high (35-50%) and in the secondary catchment area market share is strong (typically 10-30%). For general comparison goods market share is low (no higher than 10% but this is spread across a wide area) but for bulky goods market share is relatively strong – up to 25% in the primary catchment area.
- 4.111 There have been significant changes in the catchment areas and market penetration compared to that identified in 2004. In 2004 the convenience catchment extended all the way along the Dee as far as Braemar and the comparison catchment covered the whole of the city and parts of Aberdeenshire to the north and to the south. It therefore appears that the role of Garthdee as a shopping location appears to be changing – previously the catchment was very wide and the location had a sub-regional retail function. This function appears to have declined over the past decade. Nonetheless the area served by the retail location still remains wide – significant amounts of trade are drawn to Garthdee from 16 study zones for convenience goods (out of 33), 13 zones for general comparison goods and 23 zones (i.e. almost 70% of the study area zones) for bulky goods. However, the analysis of catchment areas indicates that, whereas the trade draw is widely based a higher proportion is drawn from a more limited area – for this reason the PCA and SCA areas have reduced in size.
- 4.112 This analysis is significant for assessing whether or not Garthdee should be identified as a District Centre rather than as a Commercial Centre within the retail network. Although market share within the primary catchment areas is similar to that identified for convenience goods for other locations such as Dyce and Danestone it is considered that, because the overall area served by the location remains very wide that, for the time being, it is not appropriate to identify Garthdee as a District Centre similar to other locations in Aberdeen. This situation may well change in the future once the centres for the new urban areas in Aberdeen and the new town centre for Elsick is well established. In conclusion Garthdee is not identified as a District Centre but is identified as a Commercial Centre in the retail network

Health Check

- 4.113 The nature of Garthdee as a retail location with only 5 retail units makes it difficult to apply the concepts of vitality and viability:
- *Range of Retail offer:* the range of shops available within the District Centre is very limited – but it should be noted that the range of goods within each of the individual stores is extensive.

- *Range of retail and non-retail services:* only very limited additional services are provided within the location – these are provided within the two superstores. There are also commercial sports facilities located adjacent to the retail units.
- *Shopper/household survey information:* Good to very good levels of satisfaction for food shopping and average satisfaction for comparison goods. High levels of satisfaction for ease of access to the centre. Overall average levels of satisfaction for Garthdee as an attractive place to shop.
- *Types of retail operator:* retailing in the centre/retail park is dominated by national multiples with no independents.
- *Pedestrian flows:* information on pedestrian flows is available for 2012.
- *Vacancy rates:* In 2013 no vacant units were identified – this is well below average for Scottish retail centres.
- *Environment:* the environment is dominated by car parking and vehicular access – there are very limited pedestrian links between the centre and nearby residential areas – these are constrained both by distance and levels differences.

4.114 Summary: there is limited applicability of indicators to this location. Indicators of viability appear relatively strong whereas the principal weakness is the small number of units that limits the range of facilities, services and goods types available.

Review of Retail Sectors

4.115 Within Garthdee the only convenience goods units are the two superstores both catering for main food shopping requirements. Garthdee is located well within the city with the result that there is relatively easy access to other convenience retail facilities including convenience format stores, other specialist independent retailers and other types of convenience retail. However these are not necessarily all available within relatively easy walking or public transport for local residents.

4.116 This is also true for comparison goods shopping. There is reasonably good access to other parts of the city – especially to the City Centre which provides an excellent comparison goods retail offer.

Future Prospects

4.117 Although Garthdee is located close to the Countesswells development to the west, and Loirston development to the south, both of which have substantial numbers of new housing proposed, it will be affected adversely by existing retail commitments and proposals for new retail floorspace to serve the various expansion areas and west Aberdeen generally. Therefore, despite growth in available expenditure in the wider area the turnover of Garthdee is expected to decline through to 2022 although thereafter it is expected to recover but still remaining below current levels even in 2027.

Key Retail Issues and Retail Deficiencies

4.118 The principal issues for Garthdee are:

- Significant market growth but also major new floorspace proposals in north, west and south Aberdeen increasing competition.
- The very wide area from which trade is drawn but indications that the catchment area is, gradually, becoming more concentrated.
- The limited retail offer within Garthdee.
- The lack of range of retail offer within Garthdee and the limited range of non-retail services within the centre.

Proposed Retail Strategy

4.119 The recommended Retail Strategy proposes:

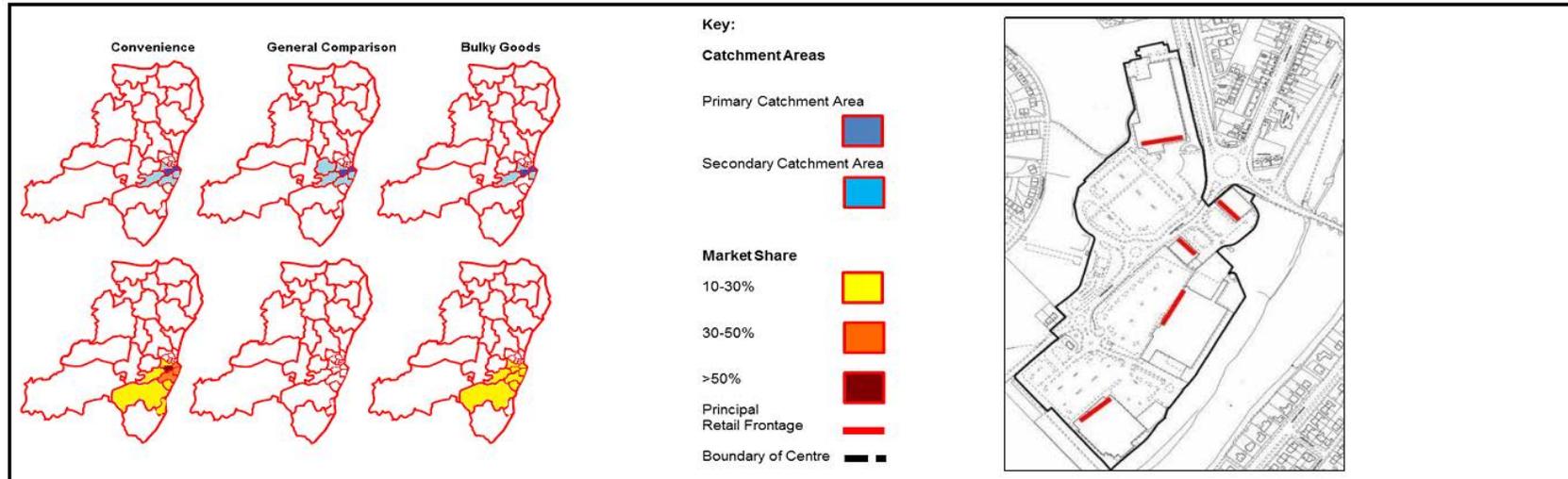
- Identification of Garthdee as a **Commercial Centre** in the retail network.

Summary and Conclusions

4.120 Garthdee remains identified as a Commercial Centre in the proposed retail strategy. However it is evident that the location is gradually developing characteristics similar to other locations identified as District Centres (e.g. Dyce and Danestone) and its future characteristics may change further with increased competition from additional floorspace proposed in various development proposals.

4.121 The centre faces a number of important issues. Although it is located close to areas of substantial housing and population growth which will result in increased available expenditure in this part of the City it is expected that the scale of retail commitments within west and south Aberdeen will result in a *decline* in retail turnover in Garthdee over the next 5-15 years.

Figure 4.7: Garthdee



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	5	10164	5814	10953	111.33	10617	6291	4035	25.38	14111	10101	1943	19.63	34892	22207	7040	156.34
Retail Services	0													0			
Vacant	0													0			
Total	5	10164	5814		£111.33m	10617	6291		£25.38m	14111	10101		£19.63m	34892	22207		£156.34m

Year	Recent Changes					Retail Goods Turnover £m	Vitality and Viability Summary	Retail Strategy Summary	
	Conv	Comp	No. of Units Ret Services	Vacant	Total			Centre Classification	Planning Policy Approach
2004	2	3	0	0	5	£166.79m	<p>The nature of Garthdee as a retail location with only a small number of major retail units renders it difficult to apply the concepts of vitality and viability:</p> <p>Good to very good levels of satisfaction for food shopping and average satisfaction for comparison goods. High levels of satisfaction for ease of access to the centre. Overall average</p> <p>Strengths: no vacancies in 2012; all units are national multiples; ease of access by private car. No vacancies in 2012.</p> <p>Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; no independents; environment dominated by car parking; poor access for pedestrians between supermarket and retail warehouse units.</p> <p>Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.</p>	Commercial Centre	Protection
2013	2	3	0	0	5	£156.34m		<p>Proposed Retail Floorspace Commitments</p> <p>Proposals</p>	

Kittybrewster

4.122 The Kittybrewster Retail Park is located 1.5kms north west of the City Centre close to Berryden District Centre. Key data for retail provision within the retail park is provided in Figure 4.8 provided at the end of this section.

Overview of Retail Provision

- Kittybrewster Retail Park Centre comprises 13 retail and retail service units. Retail units are predominantly purpose built retail warehouses primarily for bulky goods. At the time of survey one unit was vacant.
- For the retail park the total retail goods and services floorspace is 17,044 sq m of which 22% general comparison. 73% bulky goods, no retail services and 6% vacant.
- Retail goods turnover is estimated to be £26.1m (2011 prices) with 38% from general comparison goods and 62% from bulky goods.

Retail Proposals

4.123 There are no proposals for redevelopment of any part of the Kittybrewster Retail Park. However, proposals at Haudegain Triangle and Denmore Road will result in some trade diversion from Kittybrewster as will the various proposals for new District Centres – the scale of impact depends upon the precise mix of floorspace proposed.

Changes over Time

4.124 Since 2004 the overall floorspace within Kittybrewster has remained broadly the same however the turnover identified has reduced slightly (by 9%). This reduction reflects the existing vacant unit in the centre (in 2004 no units were identified to be vacant). Long term market trends and expenditure growth would be expected to have resulted in a significant increase in retail turnover in Kittybrewster over this period and it is likely that this has not occurred as a result of a combination of a number of different factors. These are:

- Adverse impacts on bulky goods retailing from the recession – this has particularly affected bulky goods retailing – a sector which is dominant in Kittybrewster. Indeed it is notable that vacancy rates in Kittybrewster have remained low – in many bulky goods retail parks elsewhere in Scotland vacancies have become high.
- Increased provision of bulky goods in superstores – especially as these have suffered from increased competition and slow growth in convenience expenditure.
- Low population growth in the local catchment area served by Kittybrewster.
- That the scale of provision at Kittybrewster for a city location could be regarded as relatively small and so retailers have not been able to gain from market concentration compared to other locations.

Catchment Area

4.125 The catchment area served by Kittybrewster is primarily located within the city of Aberdeen. Surveys have indicated that it is less extensive than Berryden despite being located close to the District Centre. For bulky goods the primary catchment area is identified to be Zone 26 and the secondary catchment Zones 25, 27, 29N, 29S and 30 i.e. the central and western parts of the city. Although geographically limited the population of this catchment is large. Market share within this area is, for bulky goods, comparatively high – up to 20% in the primary catchment and typically 10-15% in the secondary catchment.

Health Check

4.126 The nature of Kittybrewster as a retail park only comprising retail warehouse units, with no provision through smaller units, makes it difficult to apply the concepts of vitality and viability:

- *Range of Retail offer:* the range of shops available within the retail park is limited – there are only 12 occupied retail goods shops and these are limited in the types of retail categories that are provided – primarily for bulky goods.
- *Range of retail and non-retail services:* there are no significant additional services provided.
- *Shopper/household survey information:* Not available
- *Types of retail operator:* retailing in the retail park is dominated by national multiples with no independents.
- *Pedestrian flows:* information is available on pedestrian flows is available for 2012.
- *Vacancy rates:* In 2013 there was one vacant unit (8% by number of units) and 6% of floorspace was identified as vacant. This is below average for vacancy levels for Scotland.
- *Environment:* the environment is dominated by car parking and vehicular access. The building quality is typical of a retail park environment.

4.127 Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.

Review of Retail Sectors

4.128 The retail park is dominated by bulky goods retailing and this is the prime purpose for which shoppers use the retail park.

Future Prospects

4.129 As noted above Kittybrewster draws trade from a very wide area for bulky goods shopping although, from the perspective of the shops within the park the primary and secondary catchments (i.e. those areas which provide a large majority of turnover) is limited to the city of Aberdeen. Therefore the future prospects for the

retail park reflect a significantly growing catchment in terms of population and available expenditure which will support turnover growth.

4.130 However the retail park would also be affected by various proposals for new comparison floorspace. This includes “commitments” at Denmore Road and Haudegain Triangle and also the inclusion of bulky goods floorspace within superstores (e.g. for the retail of televisions, computers etc). Furthermore proposals for additional comparison floorspace both within the City Centre and in District Centres serving the new residential areas will also result in some trade diversion.

4.131 In overall terms it is expected that these factors will largely cancel each other out with the result that turnover will remain broadly flat to 2022.

4.132 Within the retail park itself there is limited opportunity for the provision of new retail floorspace.

Key Retail Issues and Retail Deficiencies

4.133 The principal issues for Kittybrewster are:

- Increased available expenditure for comparison goods but this would be largely cancelled out by increased competition from retail proposals – particularly those in north Aberdeen.
- The generally specialised nature of retail offer within Kittybrewster – largely confined to bulky goods.
- Limited opportunities within the retail park for future growth.
- The lack of range of retail offer and other services within the retail park.

Proposed Retail Strategy

4.134 The recommended Retail Strategy proposes:

- Identification of Kittybrewster Retail Park as a **Commercial Centre** within the retail network.

Summary and Conclusions

4.135 Kittybrewster Retail Park is a purpose built retail park located to the north of the City Centre. Turnover has declined marginally since 2004 reflecting the effect of a number of different factors. Nonetheless the retail park appears to have good indicators of viability but it does not provide additional facilities and services apart from shopping and therefore does have limited vitality. Despite future growth in available expenditure increased competition from proposed new floorspace will result in turnover remaining broadly constant for the foreseeable future.

4.136 The recommended Retail Strategy therefore continues with the retail park defined as a Commercial Centre within the retail network.

Figure 4.8: Ktitybrewster



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	12	0	0	#DIV/0!	0.00	3697	2773	3599	9.98	12374	7114	2259	16.07	16071	9887	2635	26.05
Retail Services	0													0			
Vacant	1													973			
Total	13	0	0		£0.00m	3697	2773		£9.98m	12374	7114		£16.07m	17044	9887		£26.05m

Year	Recent Changes					Retail Goods Turnover £m	Vitality and Viability Summary	Retail Strategy Summary	
	Conv	Comp	No. of Units Ret Services	Vacant	Total			Centre Classification	Commercial Centre (Retail Park)
2004	0	12	0	0	12	£28.53m	<p>The nature of Ktitybrewster as a retail park, comprising a series of retail warehouse units, with no provision through smaller units, makes it difficult to apply the concepts of vitality and viability:</p> <p>Average levels of satisfaction for comparison goods shopping and high levels of satisfaction for ease of access to the retail park. Overall average levels of satisfaction for Ktitybrewster RP as an attractive place to shop.</p> <p>Strengths: Low vacancy rate; ease of access by private car; high proportion of multiples. One vacant unit in 2012.</p> <p>Weaknesses: Limited retail offer reflecting retail park nature of development; limited range of additional services and facilities; limited independents; environment dominated by car parking; poor access for pedestrians between supermarket and retail warehouse units.</p> <p>Summary: limited applicability of indicators to this centre. Indicators of vitality appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.</p>	Centre Classification	Commercial Centre (Retail Park)
2013	0	12	0	1	13	£26.05m		-9%	Planning Policy Approach
								Proposed Retail Floorspace	
								Commitments	
								Proposals	

Mastrick

4.137 Mastrick centre is a small retail centre located in the west of the City. Key data for retail provision within the centre is provided in Figure 4.9 at the end of this section.

Overview of Retail Provision

- The centre comprises 23 retail and retail service units including 7 small convenience goods shops, 4 comparison goods shops, 11 retail service units and 1 vacant unit.
- For the centre the total retail goods and services floorspace is 3791 sq m GFA of which 30% is convenience goods, 23% general comparison, 4% bulky goods, 40% retail services and 2% vacant.
- Retail goods turnover is estimated to be £5.6m (2011 prices) with 59% from convenience goods, 36% from general comparison goods and only 5% from bulky goods.
- There is no single large unit within the centre which can be described as an anchor store. However there are two convenience-format stores which are important for providing day-to-day grocery needs.

Retail Proposals

4.138 There are no proposals for redevelopment of any part of the Mastrick centre. However proposals for a new centre to serve the Newhills development would be located to the north and other proposals for retail floorspace in west Aberdeen could affect the centre. Although these are expected to serve the expanded population and main food shopping requirements respectively there is the potential for some trade diversion from Mastrick.

Changes over Time

4.139 In 2004 only 17 units were identified within Mastrick and Regional Assessor data identified the retail floorspace to be significantly less than is currently found (2476 sq m compared to the current 3791 sq m). It is unlikely that this reflects new floorspace developed and may reflect under-reporting of floorspace in the earlier survey. Estimates of turnover have also been identified to have increased by 49% but this directly reflects the identified increase in floorspace.

4.140 Examination of data from 2004 reveals that the identified increase in floorspace is almost entirely attributable to general comparison goods retailing.

Catchment Area

4.141 The catchment area for Mastrick is limited. Although the retail model identifies this to be Zone 28 it is evident that the catchment is limited to the community of Mastrick with limited pass by trade. The same catchment characteristics apply to all retail goods types.

Health Check

4.142 The small size of Mastrick centre makes it difficult to apply conventional concepts of vitality and viability. The centre has a limited retail offer but does provide some additional services and facilities (such as church, library

and council offices). The vacancy rate is less than 5% measured by number of units and 5% by floorspace – this is well below Scottish average levels of vacancies.

4.143 The centre comprises purpose built retail units and provides a reasonably attractive environment. Some facilities are located across Mastrick Road but traffic flows are not too high for this to form a barrier to pedestrian movement. The centre is also well served by public transport and is easy to access on foot. The weaknesses of the centre reflect its limited size but, notwithstanding this, it has still managed to attract multiples as well as independent shops. There is no foodstore catering for main food shopping needs.

4.144 Given the limited size of the centre Mastrick displays relatively strong indicators of vitality and viability.

Review of Retail Sectors

4.145 The centre only provides a limited retail offer. For convenience goods there are two convenience format shops, two newsagents and 3 specialist independents. For comparison goods shops there is a limited range of types of shops including two chemists/drugstores.

4.146 The overall characteristics of the centre, which serves local top-up shopping needs only, together with a limited range of additional services is typical of a Local Centre serving the local community.

Future Prospects

4.147 The future prospects for shops in Mastrick reflect a combination of: general expenditure growth – particularly for comparison goods; major housing allocations at Newhills and elsewhere; major new retail development serving west Aberdeen; and pressure for market concentration. Taking these factors together it is estimated that turnover will remain broadly steady in the long term.

Key Retail Issues and Retail Deficiencies

4.148 The principal issues for Mastrick are:

- Limited growth in turnover in the long term.
- Limited retail offer – primarily serving local walk-in trade from the surrounding community.

Proposed Retail Strategy

4.149 The recommended Retail Strategy proposes:

- Identification of Mastrick as a **Local Centre** within the retail network.
- Protection of the centre from adverse retail impact from retail development proposals.

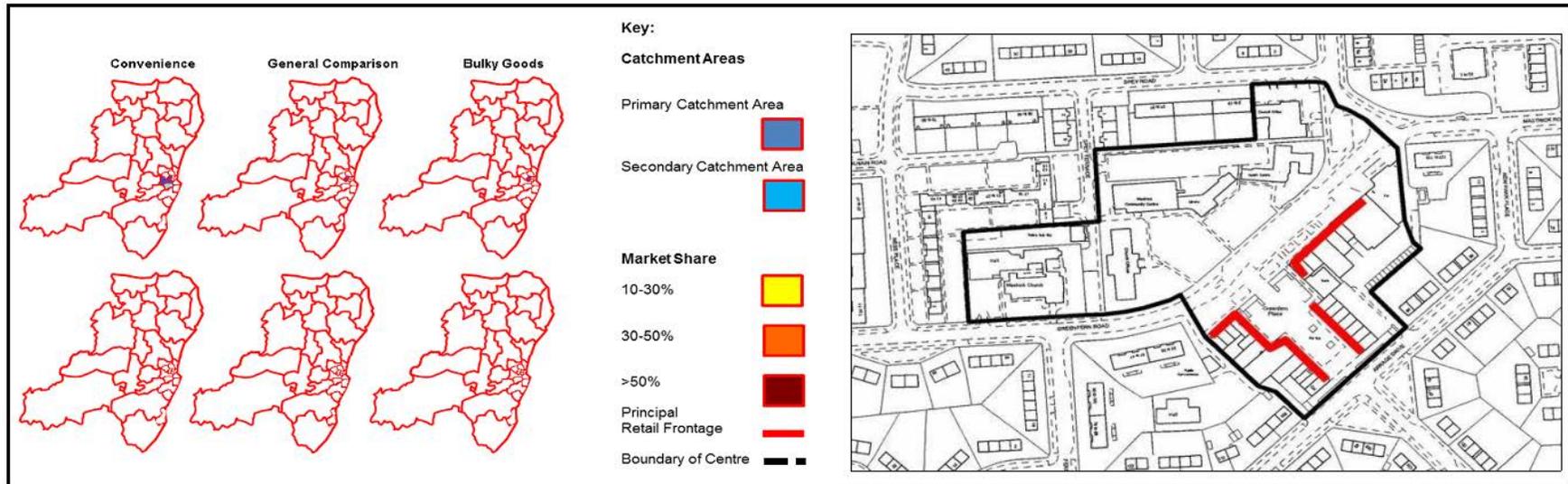
Summary and Conclusions

4.150 Mastrick centre is a small Local Centre that serves top-up and local shopping needs of residents in Mastrick. The retail offer is limited but the centre does provide additional non-retail services of importance to the community. It demonstrates good levels of vitality and viability but these must be considered in terms of the

small nature of the centre. There are a number of competing pressures affecting the centre with the result that future turnover is expected to remain broadly flat in future years with only modest growth in the long term.

4.151 The recommended Retail Strategy therefore identifies the Mastrick as a **Local Centre** in the retail network.

Figure 4.9: Mastrick



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	11	1154	750	2863	3.30	882	573	3570	2.05	159	103	2816	0.29	2194	1426	3955	5.64
Retail Services	11													1525			
Vacant	1													72			
Total	23	1154	750		£3.30m	882	573		£2.05m	159	103		£0.29m	3791	1426		£5.64m

Recent Changes							Vitality and Viability Summary		Retail Strategy Summary	
Year	Conv	Comp	No. of Units		Retail Goods Turnover £m	49%	Indicators of vitality and viability include the following: Average to above average responses to role of Mastrick as a food shopping location but below average for comparison goods shopping; Good to very good view of the ease of gaining access to the centre; overall average view as to overall attractiveness of the centre as a place to shop. Strengths: Good quality environment in town centre; good range of independents; ease of access; range of additional facilities and services; below average vacancies. Weaknesses: Limited multiples in centre; general limited scale of retail offer – especially for comparison goods; no major foodstore catering for main food shopping needs. Vacancies are below national average (4% by number of units in 2012). Summary: generally strong indicators of vitality and viability.		Centre Classification	
			Ret Services	Vacant					Local Centre	
					Protection					
2004	5	4	8	0	£3.79m					
2013	7	4	11	1	£5.64m					
							Proposed Retail Floorspace		Commitments	
									Proposals	

Middleton Park

4.152 Middleton Park comprises the Asda superstore with a small number of separate retail service units provided adjacent to the store. Key data for retail provision within the combined area is provided in Figure 4.10 at the end of this section.

Overview of Retail Provision

- Middleton Park comprises the Asda superstore and 6 small units for retail services. The Asda superstore includes a pharmacy within the store. The separate small units comprise cafés, hairdressing/beauty, laundrette and dvd hire.
- For the whole of the District Centre the total retail goods and services floorspace is 5787 sq m of which 62% is convenience goods, 22% general comparison, 4% bulky goods and 11% retail services with no vacant floorspace at time of survey.
- Retail goods turnover is estimated to be £28.4m (2011 prices) with 90% from convenience goods, 9% from general comparison goods and 2% from bulky goods.
- Within the District Centre Asda is dominant – without this store trading there would not be any effective District Centre.

Retail Proposals

4.153 There are no proposals for redevelopment of any part of Middleton Park District Centre. However there are a number of proposals in the north and west of Aberdeen that will result in trade diversion. These include:

- Convenience and comparison floorspace, including superstore, granted planning permission at Denmore Road.
- Proposals for new centres to serve major housing allocations at Grandholme and Newhills.

4.154 It should be noted that the proposals for Grandholme and Newhills include substantial new housing.

Changes over Time

4.155 According to Regional Assessor records there have been slight changes in the total floorspace within Middleton Park. These identify that total retail floorspace has increased from 5390 sq m GFA to 5787 sq m GFA reflecting implementation of a consent for extending the centre. The reason for this increase is not clear. As a result of this the total net floorspace within the District Centre has also increased with a higher proportion of this increase in convenience goods floorspace. Reflecting these changes the total retail turnover within the centre has increased by 9% in real terms.

4.156 These changes are different from those identified for nearby Danestone. The key factors underpinning these changes are broadly similar to those identified for Danestone but, because Middleton Park has been less reliant on trade from Aberdeenshire it has been less affected by competition from the new superstore in Ellon

and increased floorspace in Inverurie. Instead growth in both convenience and comparison goods expenditure has been more important in underpinning the limited growth identified.

Catchment Area

- 4.157 The catchment area for Middleton Park is broadly similar for different types of retail sectors. For all sectors the primary catchment area is identified to be Zone 25 i.e. based on the Middleton Park/Bridge of Don Area. For convenience goods a secondary catchment comprising Zones 23 (Denmore Road area) and 14 (Balmedie area) can be identified. However it should be noted that the proportion of total trade in Middleton Park from Zone 14 is only 10%. For general and bulky comparison goods the level of turnover is relatively limited and a secondary catchment area is not clearly discernible from the expenditure flow data.
- 4.158 Within the primary catchment area (Zone 25) market share for convenience goods is significant – identified to be approximately 38%. Although this is lower than a number of other superstores it should be noted that Zone 25 also contains the Danestone District Centre (Tesco) and the market share within those parts of Zone 25 closest to Middleton Park will be significantly higher. Market share in the secondary catchment area is similar in Zone 24 but significantly lower in Zone 14.
- 4.159 The high level of market share within the Middleton Park area, particularly for convenience goods, would indicate that this location serves a District Centre function for this part of north Aberdeen. This is reinforced by the presence of important local community facilities located adjacent to the retail units. These factors support the identification of Middleton Park as a District Centre.

Health Check

- 4.160 The nature of Middleton Park as a District Centre, dominated by a major superstore, with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:
- *Range of Retail offer:* the range of shops available within the District Centre is very limited – but it should be noted that the range of goods within the superstore is extensive.
 - *Range of retail and non-retail services:* some additional services are provided within the centre. Adjacent to the retail units (to the north) is a medical surgery, vet and dentist.
 - *Shopper/household survey information:* Above average levels of satisfaction for food shopping and below average satisfaction for comparison goods. High levels of satisfaction for ease of access to the centre (including both private car and public transport). Overall average satisfaction with the centre as an attractive place to shop.
 - *Types of retail operator:* retailing in the centre/retail park is dominated by a single national multiple with only limited independents (all retail services).
 - *Pedestrian flows:* information on pedestrian flows is available for 2012.
 - *Vacancy rates:* In 2013 no vacancies were identified – this is well below average vacancy levels for Scotland.

- *Environment:* the environment is dominated by car parking and vehicular access – however it is relatively easy to walk to the centre from surrounding residential areas. The building quality is typical of a retail superstore.

4.161 Summary: there is limited applicability of indicators to this location. Indicators of viability appear relatively strong whereas the principal weakness is the small number of units that limits the range of facilities, services and goods types available.

Review of Retail Sectors

4.162 Within the District Centre the only convenience goods unit is the superstore which caters well for main food shopping requirements. Middleton Park is located within the city with the result that there is relatively easy access to other convenience retail facilities including convenience format stores, other specialist independent retailers and other types of convenience retail. However these are not necessarily all available within relatively easy walking or public transport for local residents.

4.163 This is also true for comparison goods shopping. Although the northern part of the City (Bridge of Don area) has limited provision for retailing (it is confined to, primarily, superstores and retail warehouse units for bulky goods) there is reasonably good access to other parts of the city – especially to the City Centre which provides an excellent comparison goods retail offer.

Future Prospects

4.164 Although Middleton Park is located close to the Grandholme area which has substantial numbers of new housing proposed it will be affected adversely by existing retail commitments and proposals for a new District Centre to serve Grandholme. Similarly it could be affected by proposals in the Newhills/Bucksburn area. It will also be affected by the proposals for additional convenience and comparison floorspace granted planning permission at Denmore Road. Therefore, despite growth in available expenditure in the wider area the turnover of Middleton Park is expected to decline through to 2022 although thereafter it is expected to recover. The significance of these impacts is difficult to assess because this will depend upon the precise proposals for Grandholme, Newhills and Denmore Road.

Key Retail Issues and Retail Deficiencies

4.165 The principal issues for Middleton Park are:

- Significant market growth but also major new floorspace proposals in north Aberdeen increasing competition.
- The limited retail offer within Middleton Park.
- The lack of provision for pedestrians gaining access to Danestone.
- Some additional services and facilities are provided within the centre including both retail services and other community services.

Proposed Retail Strategy

4.166 The recommended Retail Strategy proposes:

- Identification of Middleton Park as a **District Centre** in the retail network.
- Policies to protect Middleton Park District Centre from adverse impact from retail proposals.

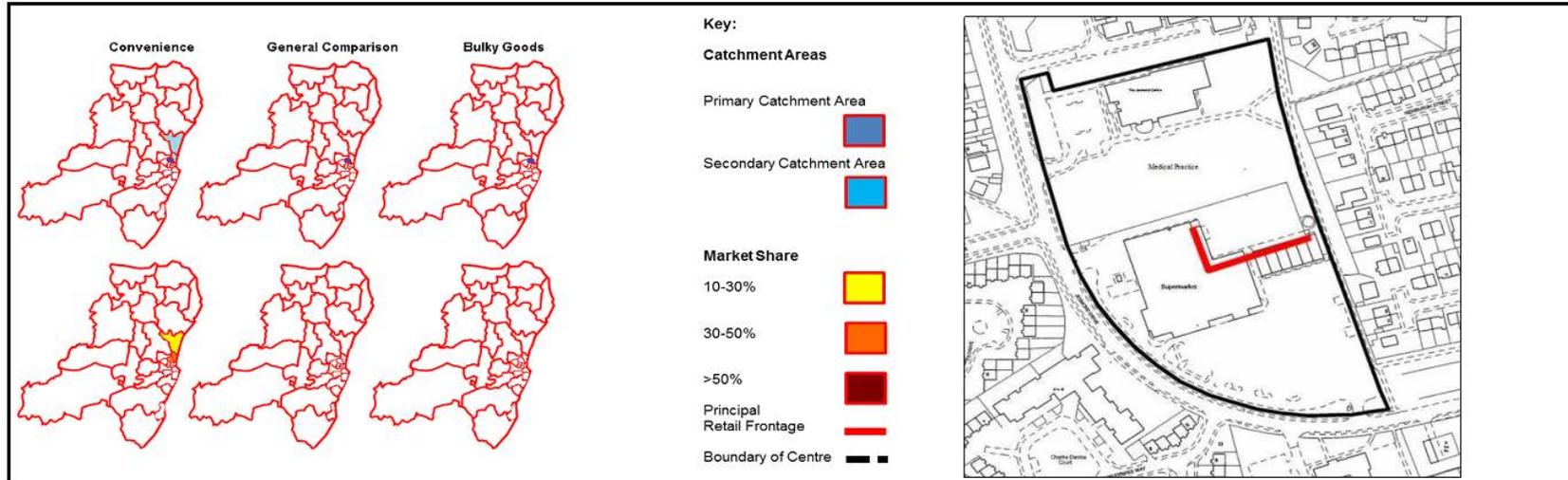
Summary and Conclusions

4.167 Middleton Park is identified as a District Centre in the proposed retail strategy. However it is clear that Middleton Park does not conform to conventional notions of a District Centre in that it is dominated by a single shop and has only a very limited range of additional retail services – although it does provide a range of community health and related facilities. Middleton Park does have an important local role and this is seen in high levels of market share within those parts of Zone 25 close to the centre and these factors, together with limited alternative provision within this part of Aberdeen have been important factors in the identification of the Middleton Park as a District Centre.

4.168 The centre faces a number of important issues. Although it is located to an area of substantial housing and population growth the proposed new centres to serve this growth and existing retail commitments are expected to result in a *decline* in retail turnover over the next 5-15 years. .

4.169 The recommended Retail Strategy therefore continues to identify Middleton Park as a District Centre within the retail network.

Figure 4.10: Middleton Park



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	1	3597	1979	7056	25.38	1285	707	3432	2.43	257	141	3887	0.55	5139	2827	10033	28.36
Retail Services	6													648			
Vacant	0													0			
Total	7	3597	1979		£25.38m	1285	707		£2.43m	257	141		£0.55m	5787	2827		£28.36m

Year	Recent Changes					Retail Goods Turnover £m	9%	Vitality and Viability Summary The nature of Middleton Park as a district centre, dominated by a major supermarket with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability: Above average levels of satisfaction for food shopping and below average satisfaction for comparison goods. Good to very good levels of satisfaction for ease of access to the centre, car parking and public transport. Overall average satisfaction with the centre as an attractive place to shop. Strengths: No vacant units; ease of access by private car. Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking. Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.	Retail Strategy Summary	
	Conv	Comp	No. of Units Ret Services	Vacant	Total				Centre Classification	Planning Policy Approach
2004	1	1	5	0	7	£25.96m		District Centre	Protection	
2013	1	0	6	0	7	£28.36m		Proposed Retail Floorspace Commitments Proposals Potentially affected by new District Centre proposals for north and west of Aberdeen.		

Rosemount

4.170 Rosemount comprises a discontinuous shopping area running along both sides of Rosemount Place to the north west of the City Centre. Key data for retail provision in Rosemount is provided in Figure 4.11 at the end of this section.

Overview of Retail Provision

Rosemount Town Centre

- The town centre comprises 88 retail and retail service units – 10 convenience, 33 comparison, 41 retail services and 4 vacant units.
- The total retail goods and services floorspace is 8518 sq m of which 26% is convenience goods, 23% general comparison, 11% bulky goods, 37% retail services and 2% vacant floorspace.
- Retail goods turnover is estimated to be £12.3m (2011 prices) with 49% from convenience goods, 40% from general comparison and 10% from bulky goods.
- Within the town centre there is no single major store.

Retail Proposals

4.171 There are no specific schemes for additional retail floorspace within, or close to, Rosemount. The centre is located close to the City Centre but it is unlikely that new floorspace within the City Centre, identified either as retail commitments (i.e. St Nicholas House) or within the proposed Retail Strategy would directly affect Rosemount.

Changes over Time

4.172 Total numbers of retail goods and service units in the centre have increased since the study undertaken in 2004 – an increase from 80 to 88 units. However there has been a substantial shift away from retail goods to retail services reflecting trends identified in numerous other small town centres elsewhere in Scotland. The changes in retail floorspace have not been as acute as the changes in numbers of units but retail goods floorspace has declined from 6213 sq m to 5164 sq m and services have increased from 1849 sq m to 3141 sq m GFA.

4.173 As a result of these changes retail turnover has declined from £15.45m to £12.34m – a decline of 20%. However whereas comparison goods turnover has declined substantially the turnover of convenience goods has actually increased. This would suggest that Rosemount has benefitted from trends towards more convenience-based local shopping.

Catchment Area

4.174 The primary catchment area for Rosemount is generally local. The primary catchment area is identified to comprise Zone 27 for convenience and general comparison goods shops although Zone 30 is also identified as part of the primary catchment area for bulky goods. The secondary catchment area for retail goods is

identified to comprise parts of Aberdeen including Zones 29N and 30 for convenience goods but slightly wider for comparison goods (including Zones 25, 28 and 29S for bulky goods).

4.175 Market penetration rates within the catchment areas are, however, low. For convenience goods market share is only 8% in the primary catchment area and are lower for other goods categories and secondary catchment areas.

Town Centre Health Check

4.176 In overall terms Rosemount town centre exhibits mixed indicators of vitality and viability:

- *Range of Retail offer:* the town centre provides a reasonable range of retail offer with most categories of retail units identified in Goad surveys present but with limited choice (except for furniture and related items where there is some choice).
- *Range of retail and non-retail services:* the town centre provides a wide range of retail services including restaurants, cafes, financial services, hair and beauty etc. but has very limited non-retail services.
- *Shopper/household survey information:* there are above average levels of satisfaction for food shopping but below average satisfaction for non-food shopping. There are generally average levels of satisfaction for ease of access to the centre except for car parking. There is a slightly above average level of satisfaction with Rosemount as a place to shop.
- *Types of retail operator:* the town centre has a strong independent sector but with limited multiples (in 2013 5 multiples were identified out of a total of 43 retail goods shops – that is 12%) however all of these are in the convenience goods sector with none in general or comparison goods shops. The independent sector is strong.
- *Pedestrian flows:* information is available on pedestrian flows is available for 2012.
- *Vacancy rates:* In 2013 4 units were identified as vacant which is 5% by number of units. Vacant floorspace is identified from Regional Assessor information to be 2%. These levels of vacancies are well below current average levels for towns in Scotland.
- *Environment:* the town centre presents a generally attractive environment but, in places, is affected by narrow pavements.

4.177 In overall terms the centre provides a reasonably wide retail offer and a good range of retail service but limited non-retail functions. However, in overall terms it is considered to have reasonably strong indicators of vitality and viability.

Review of Retail Sectors

4.178 Within the town centre the convenience retail offer is limited to comprising primarily small stores – this includes a number of convenience format shops and independent specialist retailers. It does not provide any large format convenience shops including supermarkets.

4.179 For comparison goods shops the centre provides a reasonably good choice of independents. It does not provide any large format units nor any operated by multiples. However it is close to the City Centre and a range of larger units is available in the City Centre.

Future Prospects

4.180 The catchment area served by Rosemount is primarily the existing urban areas of Aberdeen – particularly the central and western parts of the City. Within this area population growth is expected to be modest with the result that available expenditure growth for convenience goods will be modest but there will be significant growth for all types of comparison goods. However the provision of new retail floorspace throughout the City, including the City Centre, and long term trends towards market concentration will generally counter expanding markets. As a result the retail goods turnover of Rosemount is expected to remain broadly flat up to 2022 with growth possible thereafter.

Key Retail Issues and Retail Deficiencies

4.181 For convenience goods although there is limited provision within Rosemount – including that there are no shops catering for main food shopping requirements - there is access to other shopping elsewhere in the city including main food shopping superstores north of the City Centre and to the south and west of the City.

4.182 Similar issues arise for comparison goods. The catchment served by Rosemount has generally good access to the City Centre which provides a very wide retail offer – particularly for general comparison goods shops.

4.183 Because future turnover is forecast to remain generally flat, or with limited growth, it is expected that current trends and market changes will continue to increase the role of retail services within the centre.

Proposed Retail Strategy

4.184 The recommended Retail Strategy proposes:

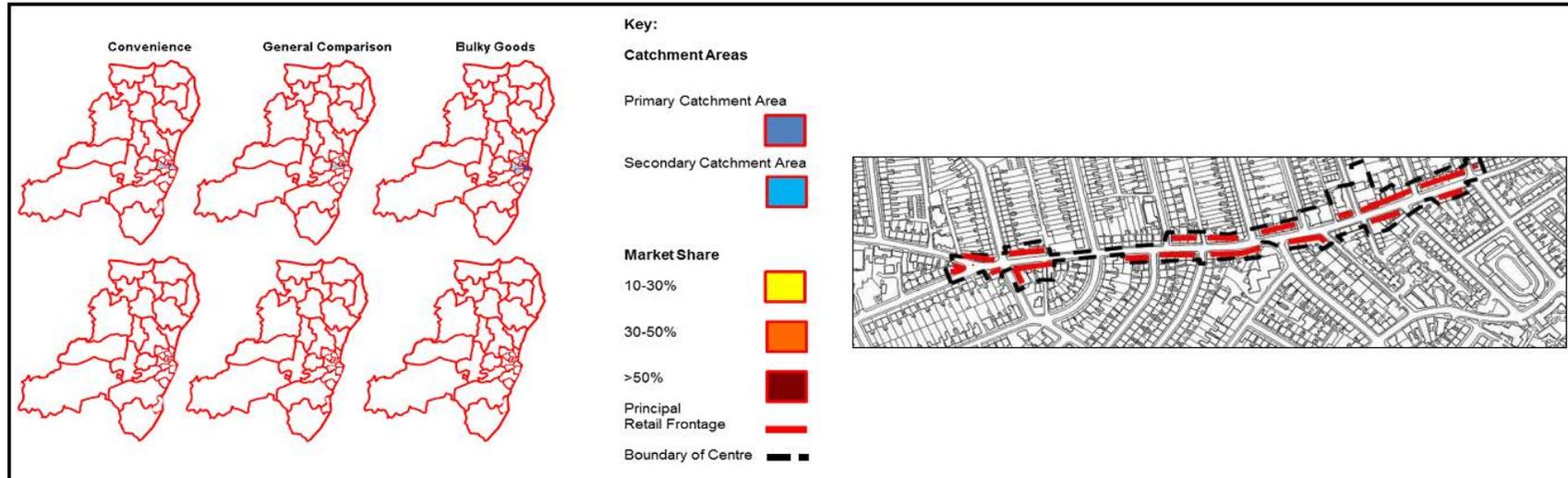
- Identification of Rosemount centre as a **town centre** in the retail network.
- Policies to protect Rosemount town centre from adverse impact from retail proposals.
- No identification of significant additional retail floorspace for the centre.

Summary and Conclusions

4.185 Rosemount is a small town centre with a good variety of retail shops for both convenience and comparison goods. Along with Torry it is distinctly different from other retail locations found in Aberdeen outwith the City Centre with a large number of retail and retail service units providing a level of diversity and choice not found in the District Centres and Commercial Centres in the City. As a result it is identified as a Town Centre rather than District Centre in the retail network. It is particularly effective in meeting day-to-day shopping needs of the local area together with a relative small but specialist comparison goods function. It also provides a good range of retail services but has limited non-retail services. Its market is generally quite local to the centre.

4.186 The recommended Retail Strategy therefore continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. No further floorspace is identified within the strategy.

Figure 4.11: Rosemount



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m
Retail Goods Shops	43	2243	1458	2703	6.06	1964	1276	3905	4.98	957	622	2078	1.29	5164	3357	3676	12.34
Retail Services	41													3141			
Vacant	4													213			
Total	88	2243	1458		£6.06m	1964	1276		£4.98m	957	622		£1.29m	8518	3357		£12.34m

Year	Recent Changes					Retail Goods Turnover £m	Vitality and Viability Summary	Retail Strategy Summary	
	Conv	Comp	No. of Units Ret Services	Vacant	Total			Centre Classification	Town Centre
2004	19	38	21	2	80	£15.45m	<p>Above average levels of satisfaction for all shopping but below average for comparison goods categories of shopping. Generally above average levels of satisfaction for ease of access to the centre except for car parking. Slightly above average levels of satisfaction for Rosemount town centre as an attractive place to shop.</p> <p>Strengths: Low vacancy rate; ease of movement within centre; environmental quality of centre; reasonable range of retail offer; strong independent sector; public transport accessibility. Vacancies are well below national average (5% by number of units in 2012).</p> <p>Weaknesses: Limited food retail offer (no major main food shop); limited multiples; adverse impacts of traffic on amenity; lack of car parking.</p> <p>Summary: although the centre has a relatively limited retail offer it exhibits generally strong indicators of vitality and viability.</p>	Centre Classification	Town Centre
2013	10	33	41	4	88	£12.34m		-20%	Planning Policy Approach
								Proposed Retail Floorspace	
								Commitments	
								Proposals	

Rousay Drive (Langstracht)

- 4.187 Rousay Drive comprises the Tesco superstore with a small number of separate retail service units provided adjacent to the store on Rousay Drive. Key data for retail provision within the combined area is provided in Figure 4.12 at the end of this section.
- 4.188 Part of this area is currently identified in the LDP as a “Neighbourhood Centre” (this excludes the Tesco store). It is the recommendation of this Report that the combined area (existing Neighbourhood Centre plus Tesco) should be identified as a District Centre – it is therefore referred to as such in the remainder of this section.

Overview of Retail Provision

- Rousay Drive comprises the Tesco superstore and 7 small units for retail goods and services. The separate small units comprise 2 convenience format stores, newsagent and the retail services comprise hot food takeaway (2) betting and hairdressing.
- For the whole of the District Centre the total retail goods and services floorspace is 7334 sq m of which 62% is convenience goods, 31% general comparison, 4% bulky goods and 4% retail services with no vacant floorspace at time of survey.
- Retail goods turnover is estimated to be £42.9m (2011 prices) with 78% from convenience goods, 20% from general comparison goods and 2% from bulky goods.
- The Tesco commenced trading only recently whereas the unit shops on Rousay Drive have been trading for a considerable period of time. In terms of total turnover the Tesco is dominant but, reflecting the longstanding existence of the local shops it is evident that the latter are not dependent on Tesco for viability.

Retail Proposals

- 4.189 There are no proposals for redevelopment of any part of Rousay Drive. Located 500m to the east is the site of the former Summerhill Academy which has been the subject of a planning application for a new Morrisons superstore. In addition there are a range of proposals in the area for new residential areas and new centres to serve these developments in north and west of Aberdeen that will have implications for Rousay Drive – the developments at Countesswells and Newhills are both located within 3kms of the retail centre. Both of these areas include substantial new housing areas.

Changes over Time

- 4.190 The Tesco store has only been trading for a limited time and so it is not appropriate to identify changes that have occurred since 2004.

Catchment Area

- 4.191 The catchment area for Rousay Drive is primarily determined by shopping patterns to the Tesco superstore. The unit shops at Rousay Drive appear, for the time being, to continue to be dependent on local walk-in and

pass-by trade. The retail catchment for the Tesco superstore is comparatively limited – the primary catchment area comprises Zones 28 and 29N (i.e. the areas to the north and south of the superstore) and the secondary catchment can be considered to include 29S. The catchment areas for general and bulky comparison goods reflect those for convenience goods.

4.192 Within the primary catchment area (Zones 28 and 29N) market share for convenience goods is significant – identified to be approximately 22-23%. Although this is lower than a number of other superstores it should be noted that this area has easy access to a range of superstores including those at Danestone, Dyce, Berryden and Garthdee, Trade draw is particularly important for those parts of Zones 28 and 29N that are closest to the centre i.e. Mastrick to the north and the residential areas to the south of the centre. Market share in the secondary catchment area is lower at 12% of total available expenditure.

4.193 The high level of market share within the areas closest to the centre and makes this location comparable to the centres at Middleton Park, Danestone and Berryden and, on the basis that these are identified as District Centres, Rousay Drive is also identified as a District Centre.

Health Check

4.194 The nature of Rousay Drive as a District Centre, dominated by a major superstore, with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:

- *Range of Retail offer:* the range of shops available within the District Centre is very limited – but it should be noted that the range of goods within the superstore is extensive.
- *Range of retail and non-retail services:* some additional services are provided within the centre. There are no significant non-retail services provided.
- *Shopper/household survey information:* None available.
- *Types of retail operator:* retailing in the centre/retail park is dominated by a single national multiple with only limited independents.
- *Pedestrian flows:* information is available on pedestrian flows is available for 2012.
- *Vacancy rates:* In 2013 no vacancies were identified – this is well below average vacancy levels for Scotland.
- *Environment:* the environment is dominated by car parking and vehicular access – however it is relatively easy to walk to the centre from surrounding residential areas. There is limited integration between the superstore and the unit shops on Rousay Drive. The building quality is typical of a retail superstore but the unit shops are of a low–average quality

4.195 Summary: there is limited applicability of indicators to this location. Indicators of viability appear relatively strong whereas the principal weakness is the small number of units that limits the range of facilities, services and goods types available.

Review of Retail Sectors

- 4.196 Within the District Centre for convenience retailing there is both the superstore which caters well for main food shopping requirements and a series of smaller units including two convenience format stores and a newsagent. Rousay Drive is located within the city with the result that there is relatively easy access to other convenience retail facilities including convenience format stores, other specialist independent retailers and other types of convenience retail. However these are not necessarily all available within relatively easy walking or public transport for local residents.
- 4.197 This is also true for comparison goods shopping. Although the western part of the City has limited provision for retailing (the nearest significant provision is at Berryden and Kittybrewster) there is reasonably good access to other parts of the city – especially to the City Centre which provides an excellent comparison goods retail offer.

Future Prospects

- 4.198 Rousay Drive is located close to the Newhills and Countesswells areas which have substantial numbers of new housing. In the absence of existing retail commitments the significant growth in available expenditure is anticipated to result in significant growth in turnover – particularly for the Tesco superstore.

Key Retail Issues and Retail Deficiencies

- 4.199 The principal issues for Rousay Drive are:
- Significant market growth but also major new floorspace proposals in west Aberdeen increasing competition.
 - The limited retail offer within Rousay Drive.
 - Some additional services and facilities are provided within the centre including retail services but no significant other community services are present.

Proposed Retail Strategy

- 4.200 The recommended Retail Strategy proposes:
- Identification of Rousay Drive as a **District Centre** in the retail network.
 - Policies to protect Rousay Drive District Centre from adverse impact from retail proposals.

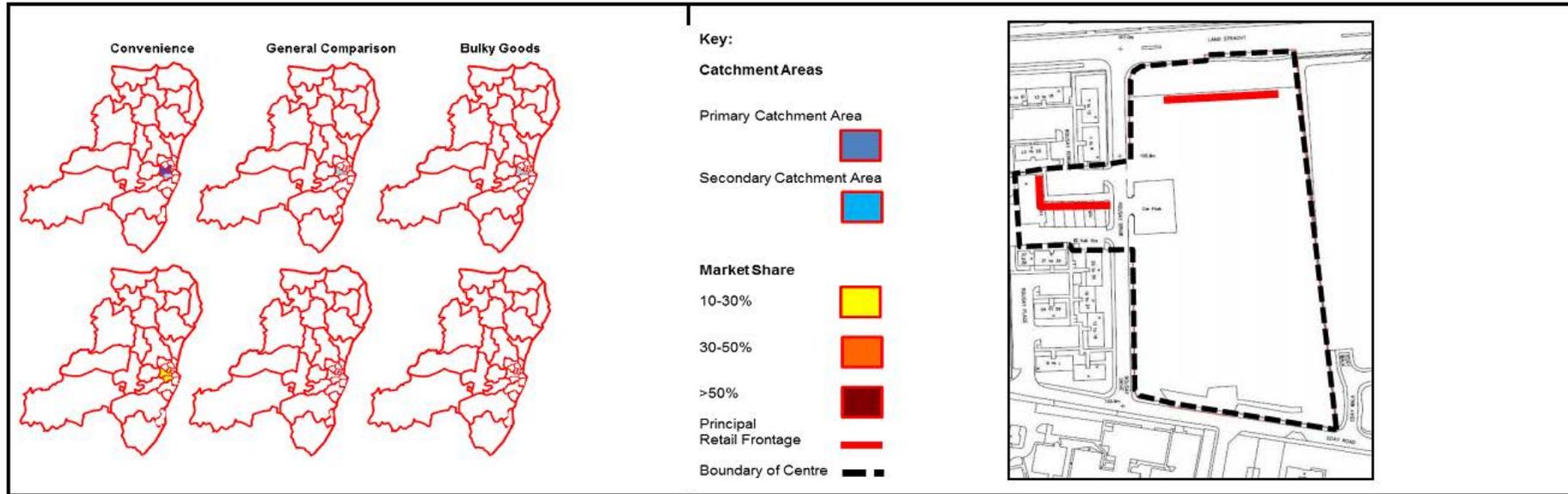
Summary and Conclusions

- 4.201 Rousay Drive is identified as a District Centre in the proposed retail strategy. However it is clear that Rousay Drive does not conform to conventional notions of a District Centre in that it is dominated by a single shop and has only a very limited range of additional retail services. Rousay Drive does now have an important local role and this is seen in relatively high levels of market share within those parts of Zone 28 and 29N close to the centre and these factors, together with limited alternative provision within this part of Aberdeen, have been important factors in the identification of the Rousay Drive as a District Centre.

4.202 The centre faces a number of important issues. Although it is located to an area of substantial housing and population growth the proposed new centres to serve this growth and existing retail commitments are expected to result in a *decline* in retail turnover in Rousay Drive over the next 5-15 years. .

4.203 The recommended Retail Strategy identifies Rousay Drive as a new District Centre within the retail network.

Figure 4.12: Rousay Drive



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m	GFA Sq M	NFA Sq M	Turnover £/Sq M	Turnover £m
Retail Goods Shops	4	4432	2881	11596	33.41	2285	1485	5779	8.58	326	212	4294	0.91	7044	4579	9371	42.90
Retail Services	4													290			
Vacant	0													0			
Total	8	4432	2881		£33.41m	2285	1485		£8.58m	326	212		£0.91m	7334	4579		£42.90m

Recent Changes						Retail Goods Turnover £m	Vitality and Viability Summary	Retail Strategy Summary	
Year	Conv	Comp	No. of Units Ret Services	Vacant	Total			Centre Classification	
2013	4	0	4	0	8	£42.90m	<p>The nature of Rousay Drive as a district centre, dominated by a major supermarket with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability.</p> <p>Strengths: No vacant units; ease of access by private car.</p> <p>Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited integration between Tesco and small parade of independent shops.</p> <p>Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.</p>	District Centre	Protection
								Proposed Retail Floorspace	
								Commitments	
								Proposals	

Torry

4.204 Torry comprises shops and related facilities located on both sides of Victoria Road and extending limited distances along side roads to the south of the City Centre. Key data for retail provision in Torry is provided in Figure 4.13 provided at the end of this section.

Overview of Retail Provision

Torry Town Centre

- The town centre comprises 61 retail and retail service units – 9 convenience, 13 comparison, 32 retail services and 7 vacant units.
- The total retail goods and services floorspace is 5552 sq m of which 25% is convenience goods, 20% general comparison, 5% bulky goods, 42% retail services and 7% vacant floorspace.
- Retail goods turnover is estimated to be £5.9m (2011 prices) with 57% from convenience goods, 37% from general comparison and 6% from bulky goods.
- Within the town centre there is no single major store.

4.205 In terms of both floorspace and retail goods turnover Torry is significantly smaller than other principal retail locations within Aberdeen. However of all the retail locations reviewed in the city outwith the City Centre it provides the widest range of non-retail services including churches, police station, library, public houses/bars, and community/support and advice. As a result although the retail offer is relatively limited the extent of additional services and facilities is such that it is considered appropriate that Torry should be identified as a town centre in the proposed Retail Strategy.

Retail Proposals

4.206 There are no specific schemes for additional retail floorspace within, or close to, Torry. The centre is located close to the City Centre but it is unlikely that new floorspace within the City Centre, identified either as retail commitments (i.e. St Nicholas House) or within the proposed Retail Strategy would directly affect Torry. Land has been allocated in the LDP for a superstore at Souter Head Road and, if implemented, it is anticipated that this is likely to result in some trade diversion from convenience goods shops in Torry.

Changes over Time

4.207 Total numbers of retail goods and service units in the town centre have increased since the study undertaken in 2004 – an increase from 55 to 61 units. However there has been a substantial shift away from retail goods to shops to retail services reflecting trends identified in numerous other small town centres elsewhere in Scotland. Total numbers of retail goods shops has declined from 30 to 22 units – a significant reduction in only 9 years. The changes in retail floorspace have not been as acute but still demonstrate the same pattern of change: total retail and retail floorspace has remained broadly the same but convenience floorspace has declined from 1808 sq m to 1410 sq m GFA (-22%) and all comparison goods floorspace has declined from 1734 sq m GFA to 1436 sq m (-17%) and retail services have increased from 1551 sq m to 2325 sq m (+50%).

4.208 As a result of these changes retail turnover has declined from £9.96m to £5.92m – a decline of 41%. Unlike Rosemount substantial declines in turnover have been identified in all retail goods categories and it is evident that Torry has *not* benefitted from changes supporting local convenience shopping.

Catchment Area

4.209 The primary catchment area for Torry is generally local. The primary catchment area is identified to comprise Zone 30 for all goods categories and a secondary catchment area comprising Zone 32 is identifiable for convenience goods retail.

4.210 Market penetration rates within the catchment areas are low. For convenience goods market share is only 4% in the primary catchment area and are lower for other goods categories and secondary catchment areas.

Town Centre Health Check

4.211 In overall terms Torry town centre exhibits general low indicators of vitality and viability:

- *Range of Retail offer:* the town centre provides a generally limited retail offer. The food retail offer includes a range of local convenience-format shops and a good range of specialist convenience shops. For comparison goods shops many categories of shops identified in Goad surveys are present but there is very limited choice. Shops are small and so the range of goods available is generally limited.
- *Range of retail and non-retail services:* the town centre provides a wide range of retail services including restaurants, cafes, financial services, hair and beauty etc. and also includes a range of important community facilities and services including: library; places of worship; police; community support and advice; MSP office; bars/pubs; credit union and solicitors amongst others.
- *Shopper/household survey information:* there are average levels of satisfaction for food shopping but below average satisfaction for non-food shopping. There are generally above average levels of satisfaction for ease of access to the centre. In overall terms however there is below average level of satisfaction with Torry as a place to shop.
- *Types of retail operator:* the town centre primarily comprises strong independent shops with only one “multiple” (which is a Spar “symbol” group store).
- *Pedestrian flows:* information on pedestrian flows is available for 2012.
- *Vacancy rates:* In 2013 7 units were identified as vacant which is 11 by number of units. Vacant floorspace is identified from Regional Assessor information to be 7%. These levels of vacancies are close to current average levels for towns in Scotland but above average for centres in Aberdeen and Aberdeenshire.
- *Environment:* the town centre presents a mixed environmental quality – some buildings are attractive and well maintained others are less well kept. Victoria Road can be a busy road and this can restrict ease of movement by pedestrians.

4.212 The centre provides mixed indicators of vitality and viability but, when compared to other centres in north east Scotland and when one considers changes that have occurred over the past decade the conclusion is that, in overall terms, the centre is relatively weak in terms of vitality and viability.

Review of Retail Sectors

4.213 Within the town centre the convenience retail offer is limited to comprising primarily small stores – this includes a number of convenience format shops and independent specialist retailers. It does not provide any large format convenience shops including supermarkets.

4.214 For comparison goods shops the centre provides a range of independents. It does not provide any large format units nor any operated by multiples. However it is close to the City Centre and a range of larger units is available in the City Centre.

Future Prospects

4.215 The catchment area served by Rosemount is primarily the existing urban areas of Aberdeen – particularly the southern and central parts of the City. Within this area population growth is expected to be modest with the result that available expenditure growth for convenience goods will be modest but there will be significant growth for all types of comparison goods. However the provision of new retail floorspace throughout the City, including the City Centre, and long term trends towards market concentration will generally counter expanding markets. As a result the retail goods turnover of Torry is expected to decline slightly to 2017 and then potentially gradually recover thereafter.

Key Retail Issues and Retail Deficiencies

4.216 For convenience goods although there is limited provision within Torry (including that there are no shops catering for main food shopping requirements) there is access to other shopping elsewhere in the city including main food shopping superstores north of the City Centre and to the south and west of the City.

4.217 Similar issues arise for comparison goods. The catchment served by Torry has generally good access to the City Centre which provides a very wide retail offer – particularly for general comparison goods shops.

4.218 Because future turnover is forecast to gradually decline in the foreseeable future it is expected that current trends and market changes will continue to increase the role of retail services within the centre. The decline in retail goods provision that has been observed since 2004, the increase in competition from new retail floorspace in the south of the city and effect of long term market changes all indicate that there is significant uncertainty regarding the future of Torry and managing change in the centre will be an important planning issue for the centre.

Proposed Retail Strategy

4.219 The recommended Retail Strategy proposes:

- Identification of Torry centre as a **Town Centre** in the retail network.
- Policies to protect Torry town centre from adverse impact from retail proposals.

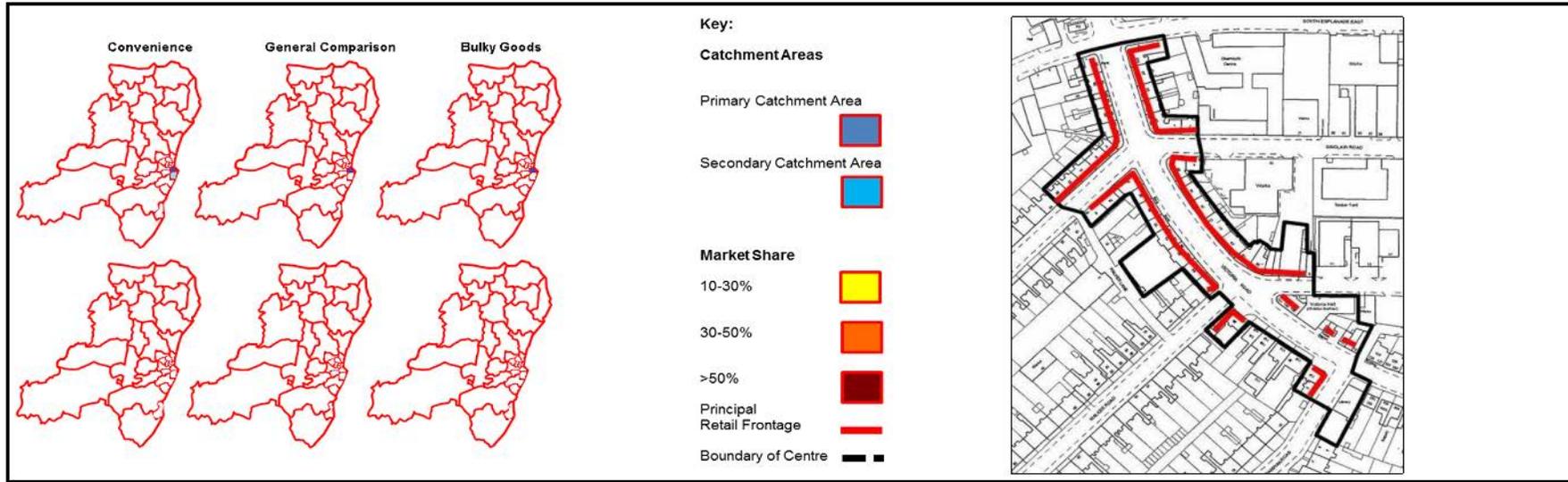
- No identification of significant additional retail floorspace for the centre.

Summary and Conclusions

4.220 Torry is a small town centre with a range of retail shops for both convenience and comparison goods. Its principal role is meeting day-to-day shopping needs of the local area together with a relative small comparison goods function. It also provides a good range of retail services and non-retail services. Its market is generally quite local to the centre.

4.221 The recommended Retail Strategy therefore continues to identify the centre as a Town Centre in the network and seeks to protect this from adverse retail impact. No further floorspace is identified within the strategy.

Figure 4.13: Torry



Floorspace and Turnover 2013																	
	No.	Convenience				General Comparison				Bulky Goods				All Goods			
		GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m	GFA Sq M	NFA Sq M	£/Sq M	Turnover £m
Retail Goods Shops	22	1410	916	2378	3.35	1135	737	2984	2.20	301	196	1858	0.36	2846	1850	3199	5.92
Retail Services	32													2325			
Vacant	7													381			
Total	61	1410	916		£3.35m	1135	737		£2.20m	301	196		£0.36m	5552	1850		£5.92m

Recent Changes						Retail Goods Turnover £m		Vitality and Viability Summary		Retail Strategy Summary	
Year	Conv	Comp	No. of Units Ret Services	Vacant	Total						
2004	13	17	18	7	55	£9.96m		Average levels of satisfaction for convenience goods shopping but below average for comparison goods categories of shopping. Generally above average levels of satisfaction for ease of access to the centre. Low levels of satisfaction for Torry town centre as an attractive place to shop.		Centre Classification	Town Centre
2013	9	13	32	7	61	£5.92m		Strengths: Public transport accessibility some additional services and facilities; compact centre. Weaknesses: Limited food retail offer (no major main food shop); limited multiples; adverse impacts of traffic on amenity; mixed environmental quality. Vacancies are above national average (15% by number of units in 2012). Summary: in general it is considered that Torry has generally weak indicators of vitality and viability.		Planning Policy Approach	Protection and manage change
						-41%				Proposed Retail Floorspace Commitments	
										Proposals	

Aberdeen City and Aberdeenshire Retail Study 2013

Final Report Volume 3:

Appendices

October 2013

reference:

Contact: **Keith Hargest**

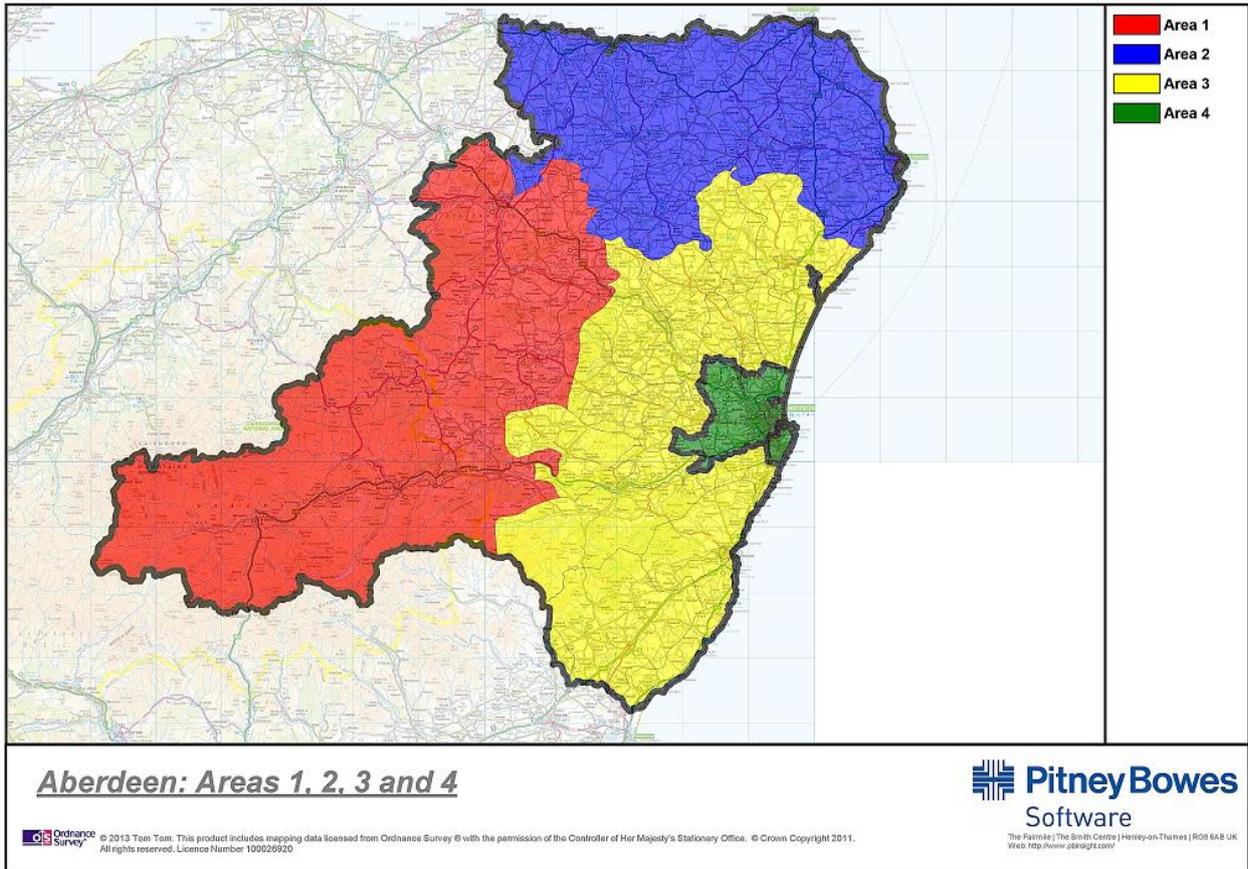
Tel: **0131 443 8813**

Email: **keith.hargest@btconnect.com**

Contents

- Appendix A. Any Site Reports
- Appendix B. Household Survey Questionnaire
- Appendix C. Retail Review – Short Bibliography
- Appendix D. Strategic Retail Model Tables
- Appendix E. Strategic Retail Model Commentary

Appendix A: AnySite Reports



A1: "Highland" Aberdeenshire

Pitney Bowes Business Insight
Consumer Retail Expenditure Summary (£ Per Annum)
Prepared by: AnySite



Prepared For: Hargest Planning
Project: Area 1: Highland

Area: Area 1: Highland					
Description	2010 Per Person	2011 Per Person	2012 Per Person	2017 Per Person	2022 Per Person
Food	1,457	1,475	1,502	1,550	1,592
Alcoholic Drink	266	276	293	290	301
Tobacco	215	229	234	193	165
Books Newspapers Magazines	142	136	135	115	98
Books	47	43	43	41	38
Newspapers and Magazines	95	92	92	74	60
Clothing and Footwear	834	878	907	1,275	1,556
Footwear	114	117	122	167	206
Clothing	720	761	785	1,108	1,351
Furniture/Floor/Textiles	375	370	367	373	407
Furniture/Floor Coverings	264	258	254	239	251
HH Textiles/Soft Furnishings	110	111	114	134	156
Audio-visual Equipment	434	410	387	739	980
Domestic Appliances	62	61	62	73	81
AV/Photo/Optical Goods	356	333	310	647	882
Telephone/Fax Equipment	17	15	16	20	18
Hardware and DIY Supplies	273	268	269	281	293
China Glass and Utensils	59	60	60	59	64
Repair/Maintenance Materials	97	93	95	94	87
Tools/Equip for Home/Garden	50	50	54	59	64
Gardens/Plants/Flowers	66	64	62	69	78
Other Goods	1,175	1,174	1,187	1,379	1,639
Chemists' Goods	378	382	384	428	498
Jewellery/Watches/Clocks	96	110	118	108	108
Non-durable HH Goods	69	66	67	70	72
Bicycles	24	25	25	30	36
Recreational Goods	461	444	445	588	753
Other Miscellaneous Goods)	149	148	148	156	173
Total Goods	5,171	5,216	5,287	6,195	7,032
Convenience Goods	2,102	2,138	2,190	2,177	2,190
Comparison Goods	3,069	3,078	3,095	4,018	4,842
Bulky Goods	326	319	315	311	331
DIY Related Goods	256	250	251	261	270
Price Base:	2010	2011	2012	2011	2011

A2: Coastal Aberdeenshire

Pitney Bowes Business Insight
Consumer Retail Expenditure Summary (£ Per Annum)
Prepared by: AnySite



Prepared For: Hargest Planning
Project: Area 2: Coast

Area:	Area 2: Coast				
Description	2010 Per Person	2011 Per Person	2012 Per Person	2017 Per Person	2022 Per Person
Food	1,419	1,437	1,463	1,507	1,547
Alcoholic Drink	262	273	289	285	295
Tobacco	214	228	233	192	164
Books Newspapers Magazines	134	128	127	108	92
Books	44	41	40	38	36
Newspapers and Magazines	90	87	86	70	56
Clothing and Footwear	801	844	871	1,225	1,496
Footwear	109	112	117	160	198
Clothing	691	731	754	1,064	1,298
Furniture/Floor/Textiles	350	346	343	348	381
Furniture/Floor Coverings	247	241	237	223	234
HH Textiles/Soft Furnishings	103	104	106	125	146
Audio-visual Equipment	409	386	365	696	924
Domestic Appliances	58	57	58	68	75
AV/Photo/Optical Goods	335	314	292	609	831
Telephone/Fax Equipment	16	15	15	20	17
Hardware and DIY Supplies	261	256	258	269	279
China Glass and Utensils	55	56	56	55	59
Repair/Maintenance Materials	96	92	93	92	86
Tools/Equip for Home/Garden	47	48	51	56	61
Gardens/Plants/Flowers	62	61	58	65	73
Other Goods	1,106	1,105	1,116	1,297	1,543
Chemists' Goods	355	359	361	402	468
Jewellery/Watches/Clocks	90	104	111	101	102
Non-durable HH Goods	64	61	62	66	67
Bicycles	23	23	23	28	34
Recreational Goods	434	418	419	553	710
Other Miscellaneous Goods)	140	140	139	147	163
Total Goods	4,957	5,002	5,064	5,927	6,720
Convenience Goods	2,050	2,086	2,134	2,119	2,129
Comparison Goods	2,907	2,916	2,932	3,808	4,591
Bulky Goods	305	299	295	291	310
DIY Related Goods	246	239	240	250	258
Price Base:	2010	2011	2012	2011	2011

A3: Aberdeenshire – Aberdeen HMA (also referred to as “Commuter”)

Pitney Bowes Business Insight

Consumer Retail Expenditure Summary (£ Per Annum)

Prepared by: AnySite



Prepared For:
Project:

Hargest Planning
Area 3: AHMA

Area: Area 3: AHMA					
Description	2010 Per Person	2011 Per Person	2012 Per Person	2017 Per Person	2022 Per Person
Food	1,462	1,480	1,507	1,553	1,592
Alcoholic Drink	256	267	282	278	288
Tobacco	218	232	237	195	167
Books Newspapers Magazines	150	143	142	121	103
Books	49	46	45	43	40
Newspapers and Magazines	101	97	97	79	63
Clothing and Footwear	903	952	985	1,388	1,699
Footwear	123	127	133	182	225
Clothing	780	825	852	1,206	1,475
Furniture/Floor/Textiles	382	377	375	380	413
Furniture/Floor Coverings	270	264	259	243	255
HH Textiles/Soft Furnishings	112	114	116	137	159
Audio-visual Equipment	455	430	406	777	1,032
Domestic Appliances	63	63	63	74	82
AV/Photo/Optical Goods	375	352	327	683	932
Telephone/Fax Equipment	17	16	16	21	18
Hardware and DIY Supplies	275	271	272	284	295
China Glass and Utensils	60	61	61	60	65
Repair/Maintenance Materials	97	93	94	93	86
Tools/Equip for Home/Garden	49	49	52	57	62
Gardens/Plants/Flowers	70	68	65	73	82
Other Goods	1,214	1,213	1,226	1,427	1,695
Chemists' Goods	378	382	384	427	495
Jewellery/Watches/Clocks	99	114	122	111	111
Non-durable HH Goods	70	67	68	72	73
Bicycles	25	26	26	31	37
Recreational Goods	486	468	470	621	796
Other Miscellaneous Goods)	157	156	156	165	182
Total Goods	5,316	5,365	5,440	6,402	7,284
Convenience Goods	2,107	2,143	2,195	2,176	2,183
Comparison Goods	3,210	3,222	3,238	4,227	5,101
Bulky Goods	333	326	322	317	337
DIY Related Goods	259	252	253	263	271
Price Base:	2010	2011	2012	2011	2011

A4: Aberdeen City

Pitney Bowes Business Insight
Consumer Retail Expenditure Summary (£ Per Annum)
Prepared by: AnySite



Prepared For: Braniff Associates
Project: Area 4: AHMA

Area: Area 4: AHMA					
Description	2010 Per Person	2011 Per Person	2012 Per Person	2017 Per Person	2022 Per Person
Food	1,490	1,508	1,533	1,574	1,607
Alcoholic Drink	286	298	315	310	320
Tobacco	226	240	246	201	171
Books Newspapers Magazines	146	139	137	117	99
Books	48	44	44	41	38
Newspapers and Magazines	98	94	94	76	61
Clothing and Footwear	868	915	944	1,323	1,610
Footwear	119	122	127	173	213
Clothing	750	793	817	1,150	1,397
Furniture/Floor/Textiles	385	379	376	379	411
Furniture/Floor Coverings	272	265	259	243	254
HH Textiles/Soft Furnishings	113	114	116	136	158
Audio-visual Equipment	445	420	396	753	993
Domestic Appliances	64	63	63	74	82
AV/Photo/Optical Goods	364	341	317	658	893
Telephone/Fax Equipment	17	16	16	21	18
Hardware and DIY Supplies	280	275	276	286	296
China Glass and Utensils	60	61	61	60	64
Repair/Maintenance Materials	101	97	98	97	90
Tools/Equip for Home/Garden	50	50	53	58	63
Gardens/Plants/Flowers	68	66	63	71	78
Other Goods	1,203	1,202	1,212	1,401	1,656
Chemists' Goods	384	388	389	431	498
Jewellery/Watches/Clocks	99	115	122	111	111
Non-durable HH Goods	70	67	68	72	72
Bicycles	25	26	26	31	37
Recreational Goods	472	454	455	598	762
Other Miscellaneous Goods)	153	152	151	159	175
Total Goods	5,329	5,376	5,435	6,344	7,163
Convenience Goods	2,170	2,208	2,255	2,232	2,231
Comparison Goods	3,159	3,168	3,178	4,112	4,931
Bulky Goods	335	328	322	316	335
DIY Related Goods	263	256	256	265	272
Price Base:	2010	2011	2012	2011	2011

Appendix B: Household Survey Questionnaire



THE POWER BEHIND THE ANSWERS

WWW.RMG-CLARITY.CO.UK

Presented to:	Keith Hargest Hargest Planning Ltd PO Box 28822 Edinburgh EH14 9AX
Tel no:	0131 443 8813
E-mail:	keith.hargest@btconnect.com
Presented by:	Saadiah Rifin Senior Research Executive RMG:Clarity Trefor House Ocean Park Cardiff CF24 5RE
Tel no:	02920 435807
Fax no:	02920 483540
E-mail:	saadiah.rifin@rmg-uk.co.uk
Web:	www.rmg-uk.co.uk



BACKGROUND & METHODOLOGY

A telephone survey was conducted within the Aberdeen area, as well as the surrounding areas in North East Scotland. The survey covered a range of aspects relating to shopping habits and in particular sought to establish the following:

Main Food Shopping

- In which shopping centre respondents buy most of their household's main food and grocery shopping
- The most important reason for shopping in that centre
- How respondents would rate the following aspects of the centre:
 - Choice of shops for food shopping
 - Choice of shops for clothing, footwear and similar items
 - Choice of shops for household electrical items
 - Choice of shops for other items
 - Ease of getting access to the centre
 - Car parking provision
 - Public transport access to the centre
 - As an attractive place to visit for a shopping trips
- How often respondents undertake their main food shopping and in which shop or supermarket
- Those not shopping online were asked how long it took to reach the store on their last main supermarket shop and the method of transport used
- The approximate amount spent on the last main food shopping trip to their principal store
- Any other supermarket/ shop used for main food shopping

Top-up Food Shopping

- Those who undertake top-up shopping for food and grocery items were asked which store they use most for this purpose, how frequently they carry out top-up shopping and the amount spent on their last top-up shop

Non-Food Shopping

- Which town respondents use most when shopping for personal goods (e.g. clothing, footwear etc), the next most important town visited and how frequently they visit these towns for these goods
- Respondents' first and second choice when shopping for bulky goods (e.g. furniture, large appliances, DIY etc)

Purchasing Methods

- How often respondents use any of the following to purchase goods for use at home:
 - Internet (including purchases via smartphones using internet)
 - By telephone (i.e. by speaking to staff and placing an order)
 - Catalogue/ mail order
 - Mobile shops
 - Farmers' Market (or similar)
 - Car boot/ jumble/ second hand sales
 - Other methods

Aberdeen City Centre

- How respondents would rate the following in Aberdeen City Centre as a shopping destination:
 - Choice of shops for clothing and footwear
 - Choice of shops for other personal goods (e.g., CDs, china, glass, jewellery etc)
 - Choice of shops for furniture floor coverings and large electrical items
 - Easy to travel to by car
 - Easy and cheap to park
 - Easy to travel to by public transport
 - As a pleasant and attractive place to visit
 - As a good place to combine shopping with other leisure activities (e.g. visit friends, the cinema etc)
 - As a good place to combine shopping with other personal business (e.g. visit the bank/building society)

Other Cities

- Any other cities (first and second choices) visited regularly for shopping trips and the types of goods purchased there

Demographics

- Age band of respondents
- Occupation/ SEG of chief wage earner
- Household's gross annual income
- Number of people in the household aged:
 - 0-15 years
 - 16 years and over
- Number of cars in the household
- Gender
- Quality control

A total of 3,000 interviews were carried out within the Aberdeen catchment area, as well as the surrounding areas in North East Scotland between 22nd April and 24th May 2013. Interviews were conducted at RMG:Clarity's in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and the evening on weekdays and weekends.

SAMPLE BREAKDOWN

The table below indicates the target number of interviews completed by zone:

Zone	Postcode Sectors	Sample Proportional	Sample Achieved	Weighting
1 + 3	AB35 5	75	75	1.00
	AB34 4			
	AB34 5			
2	AB33 8	75	75	1.00
	AB36 8			
4 + 5	AB54 4 A'shire	100	100	1.00
	AB54 8			
	AB55 5 A'shire			
	AB52 6			
6	AB54 6	75	75	1.00
	AB53 4			
7	AB54 7 A'shire	100	100	1.00
	AB44 1			
	AB45 1			
	AB45 2 A'shire			
8	AB45 3	50	50	1.00
	AB56 4 A'shire			
9	AB53 5	50	50	1.00
	AB53 6			
10	AB51 8	100	100	1.00
	AB53 8			
	AB43 6			
	AB43 7			
11	AB43 8	100	100	1.00
	AB43 9			
	AB42 0			
	AB42 1			
12	AB42 2	75	75	1.00
	AB42 3			
13	AB42 4	100	100	1.00
	AB42 5			
	AB41 7			
14	AB41 8	75	75	1.00
	AB41 9			
15	AB23 8 A'shire	100	100	1.00
	AB41 6			
16	AB21 0 A'shire	100	100	1.00
	AB21 7 A'shire			
	AB51 0			
17	AB51 3	100	100	1.00
	AB51 4			
	AB51 5			
18	AB31 4	75	75	1.00
	AB51 7			
18	AB15 8 A'shire	100	100	1.00
	AB32 6 A'shire			
	AB32 7			

Table continued...

Zone	Postcode Sectors	Sample Proportional	Sample Achieved	Weighting
19	AB14 0 A'shire	100	100	1.00
	AB31 5 A'shire			
	AB13 0			
	AB14 0 Ab City			
	AB31 5 Ab City			
20 W and 20 E	AB31 6	100	100	1.00
	AB39 3			
21	AB39 2	100	100	1.00
22	AB30 1 A'shire	100	100	1.00
	DD10 0			
	DD9 7 A'shire			
23	AB23 8 Ab City	75	75	1.00
24 N	AB21 0 Ab City	75	75	1.00
	AB21 7 Ab City			
24S	AB21 9	75	75	1.00
25	AB22 8	100	100	1.00
26	AB24 1	125	125	1.00
	AB24 2			
	AB24 3			
	AB24 4			
	AB24 5			
27	AB25 1	100	100	1.00
	AB25 2			
	AB25 3			
28	AB16 5	125	125	1.00
	AB16 6			
	AB16 7			
29S	AB10 7	125	125	1.00
	AB15 7			
	AB15 9			
29N	AB15 4	125	125	1.00
	AB15 5			
	AB15 6			
	AB15 8 Ab City			
	AB32 6 Ab City			
30	AB10 1	150	150	1.00
	AB10 6			
	AB11 5			
	AB11 6			
	AB11 7			
	AB11 8			
	AB11 9			
31	AB12 3 A'shire	75	75	1.00
	AB12 4			
	AB12 5 A'shire			
32	AB12 3 Ab City	100	100	1.00
	AB12 5 Ab City			
Total		3000	3000	

The sample used for making telephone calls was obtained from an external supplier, who supplied telephone numbers by zone and postcode sector from their database.

STATEMENT OF RELIABILITY

Assessment of the standard error:

1. This survey has been undertaken by a series of individual sample surveys for different postcode sectors.
2. The results are subject to the following sampling error, for which there follows an analysis.
3. The following analysis indicates the methodology used to calculate the standard error, with the standard 95% probability of being correct. The formulae for these calculations are as follows:

$$SE\% = \sqrt{\frac{p\%.xq\%}{n}}$$

where p% = % sample value recorded
 q% = 100% - p%
 n = sample size

and where:

±3.07 (SE%) = 95% probability that the correct answer lies in the range calculated.

4. When the sampling frame for individual zones is boosted to ensure reliability, with the results subsequently weighted proportional to population, the following analysis is used to calculate the effective sample size. The formulae for these calculations are as follows:

$$\frac{n}{\sum_{i=1}^k P_i W_i^2}$$

where k = number of zones the population and sample are divided into

n = total sample size

P = sample proportions

W = weights

16. On our sample of 3,000 interviews we have a confidence interval of 1.79 at a 95% confidence level.

The **confidence interval** is the plus-or-minus figure usually reported in newspaper or television opinion poll results. For example, if you use a confidence interval of 1.79 and 50% percent of your sample picks an answer you can be "sure" that if you had asked the question of the entire relevant population between 48.21% (**50 - 1.79**) and 51.79% (**50 + 1.79**) would have picked that answer.

The **confidence level** tells you how sure you can be. It is expressed as a percentage and represents how often the true percentage of the population who would pick an answer lies within the confidence interval. The 95% confidence level means you can be 95% certain; the 99% confidence level means you can be 99% certain. Most researchers use the 95% confidence level.

When you put the confidence level and the confidence interval together, you can say that you are 95% sure that the true percentage of the population is between **48.21%** and **51.79%**.

J11303 North East Scotland Household Survey – Final Version 4 – 29-04-13

Telephone Introduction:

Good morning/ afternoon / evening. My name is ??AgentName?? and I am calling from an independent research agency 'RMG:Clarity' on behalf of Aberdeen City Council. Who have asked us to get an understanding of people's shopping patterns in North East Scotland which will be used in detail by the Council.

Would you have 5 mins to spare please?

IF YES: "JUST TO INFORM YOU THAT THIS CALL IS BEING RECORDED FOR TRAINING AND QUALITY PURPOSES"

F1. Can I ask, are you the person responsible, or jointly responsible, for food shopping and other types of non-food shopping?

If not ask for person who is. If not available please thank respondent and close interview.

- 1 Yes
 2 No

If = 2, Prompt interviewee with message 'Please thank respondent and close interview'

F2. Can I please confirm your postcode is S_Postcode?

IF INCORRECT POSTCODE, PLEASE TYPE CORRECT POSTCODE UNDER 'OTHER' BELOW.

- 1 Postcode is correct
 2 Other (specify)

Firstly, I'd like to ask you a few questions about your food shopping

Q1. In which shopping centre do you buy most of your household's main food and grocery shopping?

DO NOT READ OUT. MARK ONE BOX ONLY.

If other, please specify the SHOPPING CENTRE

- 1 Aberdeen City Centre (unspecified)
 2 Aberdeen City Centre: Union Square
 3 Aberdeen City Centre: King Street area
 4 Aberdeen City Centre: Bon Accord
 5 Aberdeen City Centre: St Nicholas centre
 6 Aberdeen City Centre: Trinity Centre
 7 Aberdeen City Centre: Academy Centre
 8 Aberdeen City Centre: Galleria
 9 Aberdeen: Rosemount
 10 Aberdeen: Danestone
 11 Aberdeen: Garthdee/Bridge of Dee
 12 Aberdeen: Boulevard Retail Park
 13 Aberdeen: Middleton Park
 14 Aberdeen: Berryden
 15 Aberdeen: Kittybrewster
 16 Aberdeen: Mastrick/Langstracht
 17 Cults
 18 Dyce
 19 Kingswells

- 20 Aboyne
- 21 Alford
- 22 Ballater
- 23 Banchory
- 24 Banff
- 25 Brechin
- 26 Ellon
- 27 Fraserburgh
- 28 Huntly
- 29 Inverbervie
- 30 Inverurie
- 31 Kintore
- 32 Laurencekirk
- 33 Macduff
- 34 Montrose
- 35 Newburgh
- 36 New Deer
- 37 Oldmeldrum
- 38 Peterhead
- 39 Portlethen
- 40 Portsoy
- 41 Stonehaven
- 42 Turriff
- 43 Westhill
- 44 Dundee
- 45 Edinburgh
- 46 Elgin
- 47 Glasgow
- 48 Inverness
- 49 Keith
- 50 Perth
- 51 Internet shopping
- 52 Other (specify)

Q2. What would you say is your most important reason for shopping in Q1?

DO NOT READ OUT. MARK ONE BOX ONLY.

- 1 Access for disabled / elderly
- 2 Attractive pedestrian environment
- 3 Availability of parking
- 4 Close to friends or relatives
- 5 Close to home
- 6 Close to work
- 7 Good street lighting
- 8 Layout
- 9 Level of service (attitude)
- 10 Low prices
- 11 Pedestrianisation / traffic calming
- 12 Proximity to other services (e.g. banks, doctors)
- 13 Public transport links
- 14 Quality of shops
- 15 Range of café & restaurants
- 16 Range of fashion & footwear shops
- 17 Range of food shops
- 18 Range of larger shops
- 19 Range of leisure activities (cinema, bowling, etc)
- 20 Range of other non-food shops
- 21 Range of pubs
- 22 Security
- 23 Other (specify)

Q3. In Q1 how would you rate the following:

READ OUT. MARK ONE BOX ON EACH ROW.

	1 Very good	2 Good	3 Adequate	4 Poor	5 Very poor	6 Don't know
Choice of shops for food shopping	<input type="checkbox"/>					
Choice of shops for clothing, footwear and similar items	<input type="checkbox"/>					
Choice of shops for household electrical items	<input type="checkbox"/>					
Choice of shops for other items	<input type="checkbox"/>					
Ease of getting access to the centre	<input type="checkbox"/>					
Car parking provision	<input type="checkbox"/>					
Public transport access to the centre	<input type="checkbox"/>					
As an attractive place to visit for a shopping trip	<input type="checkbox"/>					

Q4. How often do you do your main food shopping in Q1?

DO NOT READ OUT. MARK ONE BOX ONLY.

- 1 More than once a week
- 2 Once a week
- 3 Once a fortnight
- 4 Once a month
- 5 Less often
- 6 Varies

Q5. In which shop or supermarket do you do your main food shopping?

DO NOT READ OUT. MARK ONE BOX ONLY.

If other, please specify the FOOD STORE NAME, ROAD/STREET NAME and AREA. E.g. Co-op, High Street, Banff

- 1 Aldi, Aberdeen – Boulevard RP
- 2 Aldi, Elgin
- 3 Aldi, Ellon
- 4 Aldi, Westhill
- 5 ASDA, Union Terrace, Aberdeen
- 6 ASDA, Riverview Drive, Dyce
- 7 ASDA, Garthdee, Aberdeen
- 8 ASDA, Huntly
- 9 ASDA, Elgin
- 10 ASDA, Peterhead
- 11 ASDA, Portlethen
- 12 Co-op / Tesco, Berryden
- 13 Co-op, George Street, Aberdeen
- 14 Co-op, Aboyne
- 15 Co-op, Alford
- 16 Co-op, Netherly Place, Ballater
- 17 Co-op, High Street, Banff
- 18 Co-op, Banchory
- 19 Co-op, Trinity Road, Brechin
- 20 Co-op, Elgin
- 21 Co-op, Smiddyhill Road, Fraserburgh
- 22 Co-op, King Street, Huntly
- 23 Co-op, Inverbervie
- 24 Co-op, Laurencekirk
- 25 Co-op, Macduff
- 26 Co-op, Peterhead

- 27 Co-op, Seafield Street, Portsoy
- 28 Co-op, David Street, Stonehaven
- 29 Co-op, Balmellie Street, Turriff
- 30 Costco, Westhill
- 31 Costcutter, The Square, Ellon
- 32 Farmfoods, George Street, Aberdeen
- 33 Farmfoods, Fraserburgh
- 34 Farmfoods, Peterhead
- 35 Iceland, Holburn Street, Aberdeen
- 36 Lidl, Aberdeen – Bucksburn
- 37 Lidl, Aberdeen – King Street/Bridge of Don
- 38 Lidl, Aberdeen – Langstracht
- 39 Lidl, Aberdeen – Torry
- 40 Lidl, Fraserburgh
- 41 Lidl, Inverurie
- 42 Lidl, Peterhead
- 43 Mace, Aboyne
- 44 Mace, Kintore
- 45 Marks & Spencer, St Nicholas Street, Aberdeen
- 46 Morrisons, Aberdeen
- 47 Morrisons, Inverurie
- 48 Morrisons, Peterhead
- 49 Other, Aberdeen
- 50 Sainsbury, St Nicholas Centre, Aberdeen
- 51 Sainsbury, Garthdee
- 52 Spar, Kintore
- 53 Tesco, Aberdeen (not specified)
- 54 Tesco, Aberdeen City Centre
- 55 Tesco, Banchory
- 56 Tesco, Banff
- 57 Tesco, Laurel Drive, Danestore
- 58 Tesco, Aberdeen Other
- 59 Tesco, Elgin
- 60 Tesco, Ellon
- 61 Tesco, Fraserburgh
- 62 Tesco, Deveron Road, Huntly
- 63 Tesco, Inverurie
- 64 Tesco, Keith
- 65 Tesco, Endeavour Drive, Arnhall Business Park, Westhill
- 66 Other, Ellon
- 67 Other, Inverbervie
- 68 Other, Peterhead
- 69 Safeway, Westhill
- 70 Internet Shopping
- 71 Other (specify)

If = 70, do not ask 'Q6'
If = 70, do not ask 'Q7'

Q6. How long did it take you to travel to your last main supermarket shop?

DO NOT READ OUT. MARK ONE BOX ONLY.

- 1 0-5 minutes
- 2 6-10 minutes
- 3 11-15 minutes
- 4 16-20 minutes
- 5 21-30 minutes
- 6 Over 30 minutes
- 7 Didn't travel – goods delivered

If = 7, do not ask 'Q7'

Q7. How did you travel there?

DO NOT READ OUT. MARK ONE BOX ONLY.

- 1 Car / van (driver)
- 2 Car / van (passenger)
- 3 Bus / coach
- 4 Train
- 5 Taxi
- 6 Walk
- 7 Bicycle
- 8 Other (specify)

Q8. Approximately how much did you spend on your last main food shopping trip to Q5?

DO NOT READ OUT. MARK ONE BOX ONLY.

- 1 Less than £10
- 2 £10 - £19
- 3 £20 - £29
- 4 £30 - £39
- 5 £40 - £49
- 6 £50 - £59
- 7 £60 - £69
- 8 £70 - £79
- 9 £80 - £89
- 10 £90 - £99
- 11 £100 - £109
- 12 £110 - £119
- 13 £120 - £129
- 14 £130 - £139
- 15 £140 - £149
- 16 £150 or more
- 17 Refused
- 18 Varies

Q9. In which other supermarkets or shops (ie. other than Q5 and including those located in other towns / centres) do you undertake ANY MAIN FOOD shopping on a regular basis (for example, at least once a month)?

DO NOT READ OUT. MARK ONE BOX ONLY.

If other, please specify the FOOD STORE NAME, ROAD/STREET NAME and AREA. E.g. Co-op, High Street, Banff

(3 maximum responses)

- 1 Aldi, Aberdeen – Boulevard RP
- 2 Aldi, Elgin
- 3 Aldi, Ellon
- 4 Aldi, Westhill
- 5 ASDA, Union Terrace, Aberdeen
- 6 ASDA, Riverview Drive, Dyce
- 7 ASDA, Garthdee, Aberdeen
- 8 ASDA, Huntly
- 9 ASDA, Elgin
- 10 ASDA, Peterhead
- 11 ASDA, Portlethen
- 12 Co-op / Tesco, Berryden
- 13 Co-op, George Street, Aberdeen
- 14 Co-op, Aboyne
- 15 Co-op, Alford
- 16 Co-op, Netherly Place, Ballater
- 17 Co-op, High Street, Banff
- 18 Co-op, Banchory
- 19 Co-op, Trinity Road, Brechin

- 20 Co-op, Elgin
- 21 Co-op, Smiddyhill Road, Fraserburgh
- 22 Co-op, King Street, Huntly
- 23 Co-op, Inverbervie
- 24 Co-op, Laurencekirk
- 25 Co-op, Macduff
- 26 Co-op, Peterhead
- 27 Co-op, Seafeld Street, Portsoy
- 28 Co-op, David Street, Stonehaven
- 29 Co-op, Balmellie Street, Turriff
- 30 Costco, Westhill
- 31 Costcutter, The Square, Ellon
- 32 Farmfoods, George Street, Aberdeen
- 33 Farmfoods, Fraserburgh
- 34 Farmfoods, Peterhead
- 35 Iceland, Holburn Street, Aberdeen
- 36 Lidl, Aberdeen – Bucksburn
- 37 Lidl, Aberdeen – King Street/Bridge of Don
- 38 Lidl, Aberdeen – Langstracht
- 39 Lidl, Aberdeen – Torry
- 40 Lidl, Fraserburgh
- 41 Lidl, Inverurie
- 42 Lidl, Peterhead
- 43 Mace, Aboyne
- 44 Mace, Kintore
- 45 Marks & Spencer, St Nicholas Street, Aberdeen
- 46 Morrisons, Aberdeen
- 47 Morrisons, Inverurie
- 48 Morrisons, Peterhead
- 49 Other, Aberdeen
- 50 Sainsbury, St Nicholas Centre, Aberdeen
- 51 Sainsbury, Garthdee
- 52 Spar, Kintore
- 53 Tesco, Aberdeen (not specified)
- 54 Tesco, Aberdeen City Centre
- 55 Tesco, Banchory
- 56 Tesco, Banff
- 57 Tesco, Laurel Drive, Danestore
- 58 Tesco, Aberdeen Other
- 59 Tesco, Elgin
- 60 Tesco, Ellon
- 61 Tesco, Fraserburgh
- 62 Tesco, Deveron Road, Huntly
- 63 Tesco, Inverurie
- 64 Tesco, Keith
- 65 Tesco, Endeavour Drive, Arnhall Business Park, Westhill
- 66 Other, Ellon
- 67 Other, Inverbervie
- 68 Other, Peterhead
- 69 Safeway, Westhill
- 70 Internet Shopping
- 71 No other store used
- 72 Other (specify)

Q10. In addition to your main food shop, do you normally do any other top-up shopping for food and grocery items at a supermarket / food store?

MARK ONE BOX ONLY.

- 1 Yes
- 2 No

If = 2, do not ask 'Q11'
If = 2, do not ask 'Q12'
If = 2, do not ask 'Q13'
If = 2, do not ask 'Q20Loop'
If = 2, do not ask 'Q20Other'
If = 1, do not ask 'Q21'

Q11. Which one store do you use for most of your top-up food shopping (i.e. visits to shops to purchase small number of goods on as and when needed basis)?

DO NOT READ OUT. MARK ONE BOX ONLY.

If other, please specify the FOOD STORE NAME, ROAD/STREET NAME and AREA. E.g. Co-op, High Street, Banff

- 1 Aldi, Aberdeen – Boulevard RP
- 2 Aldi, Elgin
- 3 Aldi, Ellon
- 4 Aldi, Westhill
- 5 ASDA, Aberdeen
- 6 ASDA, Dyce,
- 7 ASDA, Garthdee, Aberdeen
- 8 ASDA, Huntly
- 9 ASDA, Elgin
- 10 ASDA, Peterhead
- 11 ASDA, Portlethen
- 12 Co-op / Tesco, Berryden
- 13 Co-op, Aberdeen
- 14 Co-op, Aboyne
- 15 Co-op, Alford
- 16 Co-op, Ballater
- 17 Co-op, Banff
- 18 Co-op, Banchory
- 19 Co-op, Brechin
- 20 Co-op, Elgin
- 21 Co-op, Fraserburgh
- 22 Co-op, Huntly
- 23 Co-op, Inverbervie
- 24 Co-op, Laurencekirk
- 25 Co-op, Macduff
- 26 Co-op, Peterhead
- 27 Co-op, Portsoy
- 28 Co-op, Stonehaven
- 29 Co-op, Turriff
- 30 Costco, Westhill
- 31 Costcutter, Ellon
- 32 Farmfoods, Aberdeen
- 33 Farmfoods, Fraserburgh
- 34 Farmfoods, Peterhead
- 35 Iceland, Aberdeen
- 36 Lidl, Aberdeen – Bucksburn
- 37 Lidl, Aberdeen – King Street/Bridge of Don
- 38 Lidl, Aberdeen – Langstracht
- 39 Lidl, Aberdeen – Torry
- 40 Lidl, Fraserburgh
- 41 Lidl, Inverurie
- 42 Lidl, Peterhead
- 43 Mace, Aboyne
- 44 Mace, Kintore
- 45 Marks & Spencer, Aberdeen
- 46 Morrisons, Aberdeen
- 47 Morrisons, Inverurie
- 48 Morrisons, Peterhead
- 49 Other, Aberdeen
- 50 Sainsbury, Aberdeen
- 51 Sainsbury, Garthdee
- 52 Spar, Kintore
- 53 Tesco, Aberdeen (not specified)
- 54 Tesco, Aberdeen City Centre
- 55 Tesco, Banchory
- 56 Tesco, Banff
- 57 Tesco, Danestore
- 58 Tesco, Aberdeen Other

- 59 Tesco, Elgin
- 60 Tesco, Ellon
- 61 Tesco, Fraserburgh
- 62 Tesco, Huntly
- 63 Tesco, Inverurie
- 64 Tesco, Keith
- 65 Tesco, Westhill
- 66 Other, Ellon
- 67 Other, Inverbervie
- 68 Other, Peterhead
- 69 Safeway, Westhill
- 70 Internet Shopping
- 71 Other (specify)

Q12. How often do you do your top-up food shopping?

DO NOT READ OUT. MARK ONE BOX ONLY.

- 1 More than once a week
- 2 Once a week
- 3 Once a fortnight
- 4 Once a month
- 5 Less often
- 6 Varies

Q13. How much did you spend on your last top-up shop on food and groceries?

DO NOT READ OUT. MARK ONE BOX ONLY.

- 1 Less than £10
- 2 £10 - £19
- 3 £20 - £29
- 4 £30 - £39
- 5 £40 - £49
- 6 £50 - £59
- 7 £60 - £69
- 8 £70 - £79
- 9 £80 - £89
- 10 £90 - £99
- 11 £100 - £109
- 12 £110 - £119
- 13 £120 - £129
- 14 £130 - £139
- 15 £140 - £149
- 16 £150 or more
- 17 Refused
- 18 Varies

I would like to ask you a few questions about where you purchase “personal” goods such as clothing, footwear, radio, china, glass, sports goods, jewellery etc.

Q14. In which town do you do your main shopping for these “personal” goods (e.g.clothing, footwear, radio, china, glass, sports goods, jewellery)?

DO NOT READ OUT. MARK ONE BOX ONLY.

ONLY RECORD THE TOWN NAME

- 1 Aberdeen City Centre (unspecified)
- 2 Aberdeen City Centre: Union Square
- 3 Aberdeen City Centre: King Street area
- 4 Aberdeen City Centre: Bon Accord
- 5 Aberdeen City Centre: St Nicholas centre
- 6 Aberdeen City Centre: Trinity Centre
- 7 Aberdeen City Centre: Academy Centre

- 8 Aberdeen City Centre: Galleria
- 9 Aberdeen: Rosemount
- 10 Aberdeen: Danestone
- 11 Aberdeen: Garthdee/Bridge of Dee
- 12 Aberdeen: Boulevard Retail Park
- 13 Aberdeen: Middleton Park
- 14 Aberdeen: Berryden
- 15 Aberdeen: Kittybrewster
- 16 Aberdeen: Mastrick/Langstracht
- 17 Aboyne
- 18 Alford
- 19 Ballater
- 20 Banchory
- 21 Banff
- 22 Brechin
- 23 Cults
- 24 Dundee
- 25 Dyce
- 26 Edinburgh
- 27 Elgin
- 28 Ellon
- 29 Fraserburgh
- 30 Glasgow
- 31 Huntly
- 32 Inverbervie
- 33 Inverness
- 34 Inverurie
- 35 Keith
- 36 Kingswells
- 37 Kintore
- 38 Laurencekirk
- 39 Macduff
- 40 Montrose
- 41 New Deer
- 42 Newburgh
- 43 Oldmeldrum
- 44 Perth
- 45 Peterhead
- 46 Portlethen
- 47 Portsoy
- 48 Stonehaven
- 49 Turriff
- 50 Westhill
- 51 Delivered (e.g. mail order / catalogue / internet)
- 52 Don't buy
- 53 Other (specify)

If = 52, do not ask 'Q15'

Q15. Approximately how frequently do you do shopping for “personal” goods in Q14?

DO NOT READ OUT. MARK ONE BOX ONLY.

- 1 Once a month
- 2 Once every 3 months
- 3 Once every 6 months
- 4 Once every 9 months
- 5 Once a year
- 6 Varies

Q16. Which is the next most important town for shopping for “personal” goods?

DO NOT READ OUT. MARK ONE BOX ONLY.

ONLY RECORD THE TOWN NAME

- 1 Aberdeen City Centre (unspecified)
- 2 Aberdeen City Centre: Union Square
- 3 Aberdeen City Centre: King Street area
- 4 Aberdeen City Centre: Bon Accord
- 5 Aberdeen City Centre: St Nicholas centre
- 6 Aberdeen City Centre: Trinity Centre
- 7 Aberdeen City Centre: Academy Centre
- 8 Aberdeen City Centre: Galleria
- 9 Aberdeen: Rosemount
- 10 Aberdeen: Danestone
- 11 Aberdeen: Garthdee/Bridge of Dee
- 12 Aberdeen: Boulevard Retail Park
- 13 Aberdeen: Middleton Park
- 14 Aberdeen: Berryden
- 15 Aberdeen: Kittybrewster
- 16 Aberdeen: Mastrick/Langstracht
- 17 Aboyne
- 18 Alford
- 19 Ballater
- 20 Banchory
- 21 Banff
- 22 Brechin
- 23 Cults
- 24 Dundee
- 25 Dyce
- 26 Edinburgh
- 27 Elgin
- 28 Ellon
- 29 Fraserburgh
- 30 Glasgow
- 31 Huntly
- 32 Inverbervie
- 33 Inverness
- 34 Inverurie
- 35 Keith
- 36 Kingswells
- 37 Kintore
- 38 Laurencekirk
- 39 Macduff
- 40 Montrose
- 41 New Deer
- 42 Newburgh
- 43 Oldmeldrum
- 44 Perth
- 45 Peterhead
- 46 Portlethen
- 47 Portsoy
- 48 Stonehaven
- 49 Turriff
- 50 Westhill
- 51 Delivered (e.g. mail order / catalogue / internet)
- 52 Don't buy
- 53 No other town used
- 54 Other (specify)

If = 53, do not ask 'Q17'
If = 53, do not ask 'Q17'

Q17. How frequently do you go shopping in Q16 for these “personal” goods?

DO NOT READ OUT. MARK ONE BOX ONLY.

- 1 Once a month
- 2 Once every 3 months
- 3 Once every 6 months
- 4 Once every 9 months
- 5 Once a year
- 6 Varies

I would like to ask you a few questions about where you purchase “bulky” goods such as furniture, carpets, large domestic appliances (e.g. fridges, freezers, cookers etc) and other household hardware including DIY goods.

Q18. In which town do you do your main shopping for these “bulky” goods (e.g. furniture, carpets, large domestic appliances (such as fridges, freezers, cookers etc) and other household hardware including DIY goods)?

DO NOT READ OUT. MARK ONE BOX ONLY.

ONLY RECORD THE TOWN NAME

- 1 Aberdeen City Centre (unspecified)
- 2 Aberdeen City Centre: Union Square
- 3 Aberdeen City Centre: King Street area
- 4 Aberdeen City Centre: Bon Accord
- 5 Aberdeen City Centre: St Nicholas centre
- 6 Aberdeen City Centre: Trinity Centre
- 7 Aberdeen City Centre: Academy Centre
- 8 Aberdeen City Centre: Galleria
- 9 Aberdeen: Rosemount
- 10 Aberdeen: Danestone
- 11 Aberdeen: Garthdee/Bridge of Dee
- 12 Aberdeen: Boulevard Retail Park
- 13 Aberdeen: Middleton Park
- 14 Aberdeen: Berryden
- 15 Aberdeen: Kittybrewster
- 16 Aberdeen: Mastrick/Langstracht
- 17 Aboyne
- 18 Alford
- 19 Ballater
- 20 Banchory
- 21 Banff
- 22 Brechin
- 23 Cults
- 24 Dundee
- 25 Dyce
- 26 Edinburgh
- 27 Elgin
- 28 Ellon
- 29 Fraserburgh
- 30 Glasgow
- 31 Huntly
- 32 Inverbervie
- 33 Inverness
- 34 Inverurie
- 35 Keith
- 36 Kingswells
- 37 Kintore
- 38 Laurencekirk
- 39 Macduff
- 40 Montrose
- 41 New Deer
- 42 Newburgh

- 43 Oldmeldrum
- 44 Perth
- 45 Peterhead
- 46 Portlethen
- 47 Portsoy
- 48 Stonehaven
- 49 Turriff
- 50 Westhill
- 51 Delivered (e.g. mail order / catalogue / internet)
- 52 Don't buy
- 53 Other (specify)

If = 52, do not ask 'Q19'

Q19. Which is the next most important town for shopping for “bulky” goods?

DO NOT READ OUT. MARK ONE BOX ONLY.

ONLY RECORD THE TOWN NAME

- 1 Aberdeen City Centre (unspecified)
- 2 Aberdeen City Centre: Union Square
- 3 Aberdeen City Centre: King Street area
- 4 Aberdeen City Centre: Bon Accord
- 5 Aberdeen City Centre: St Nicholas centre
- 6 Aberdeen City Centre: Trinity Centre
- 7 Aberdeen City Centre: Academy Centre
- 8 Aberdeen City Centre: Galleria
- 9 Aberdeen: Rosemount
- 10 Aberdeen: Danestone
- 11 Aberdeen: Garthdee/Bridge of Dee
- 12 Aberdeen: Boulevard Retail Park
- 13 Aberdeen: Middleton Park
- 14 Aberdeen: Berryden
- 15 Aberdeen: Kittybrewster
- 16 Aberdeen: Mastrick/Langstracht
- 17 Aboyne
- 18 Alford
- 19 Ballater
- 20 Banchory
- 21 Banff
- 22 Brechin
- 23 Cults
- 24 Dundee
- 25 Dyce
- 26 Edinburgh
- 27 Elgin
- 28 Ellon
- 29 Fraserburgh
- 30 Glasgow
- 31 Huntly
- 32 Inverbervie
- 33 Inverness
- 34 Inverurie
- 35 Keith
- 36 Kingswells
- 37 Kintore
- 38 Laurencekirk
- 39 Macduff
- 40 Montrose
- 41 New Deer
- 42 Newburgh
- 43 Oldmeldrum
- 44 Perth
- 45 Peterhead
- 46 Portlethen
- 47 Portsoy
- 48 Stonehaven

- 49 Turriff
- 50 Westhill
- 51 Delivered (e.g. mail order / catalogue / internet)
- 52 Don't buy
- 53 No other town used
- 54 Other (specify)

Q20. How often do you use any of the following to purchase goods for use at home?

READ OUT. MARK ONE BOX ON EACH ROW ONLY.

	1 Often	2 Occasionally	3 Never	4 Don't know
Internet (include purchases via smartphones using internet)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
By telephone (i.e. by speaking to staff and placing an order)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Catalogue / mail order	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile shops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Farmers' Market (or similar)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Car boot / jumble / second hand sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q20Other. Do you use any other methods to purchase goods for use at home?

IF 'Yes' ENTER ASPECT BELOW

IF 'No' LEAVE BLANK

NB it is very important you leave the text box blank if there are no other aspects as this will affect the routing if done incorrectly.

If Q14Other is left blank, do not ask Q14Otherrating

Q20Otherrating. How often do you use this method to purchase goods for use at home?

READ OUT. MARK ONE BOX ONLY.

- 1 Often
- 2 Occasionally
- 3 Never

Q21. On average, approximately, how much do you think that your household would spend using all of those just named during a year?

PLEASE ENTER IN AMOUNT EXACTLY AS RESPONDENT SAYS

I would like to ask you a few questions about Aberdeen City Centre as a place to shop.

Q22. How would you rate the following in Aberdeen City Centre as a shopping destination?

READ OUT. MARK ONE BOX ONLY.

	1 Very good	2 Good	3 Adequate	4 Poor	5 Very poor	6 Don't know
Choice of shops for clothing and footwear	<input type="checkbox"/>					
Choice of shops for other personal goods (e.g., CDs, china, glass, jewellery etc)	<input type="checkbox"/>					
Choice of shops for furniture, floor coverings and large household electrical items	<input type="checkbox"/>					
Easy to travel to by car	<input type="checkbox"/>					
Easy and cheap to park	<input type="checkbox"/>					
Easy to travel to by public transport	<input type="checkbox"/>					
As a pleasant and attractive place to visit	<input type="checkbox"/>					
As a good place to combine shopping with other leisure activities (e.g. visit friends, the cinema etc)	<input type="checkbox"/>					
As a good place to combine shopping with other personal business (e.g. visit the bank/building society)	<input type="checkbox"/>					

I'd now like to ask some questions on other cities

Q23. Could I ask whether you visit any other cities for shopping trips on a regular basis (once or more per year)?

MARK ONE BOX ONLY.

- 1 Yes
- 2 No

If = 2, do not ask 'Q24Loop'
If = 2, do not ask 'Q25'

Q24. Which cities are these?

DO NOT READ OUT. MARK UP TO TWO BOXES WITH THE FIRST CHOICE BEING THE CITY THE RESPONDENT GOES TO THE MOST

THE SECOND CHOICE BEING THE CITY THE RESPONDENT GOES NEXT MOST OFTEN.

	1 Dundee	2 Edinburgh	3 Elgin	4 Glasgow	5 Inverness	6 Newcastle	7 Perth	8 Stirling	9 Other (specify)
First choice	<input type="checkbox"/>	<input type="text"/>							
Second choice	<input type="checkbox"/>	<input type="text"/>							

Q25. What types of goods do you buy when you visit !!ResponseText("Q24:"+Q24[1])!?!?

MARK ALL THAT APPLY. DO NOT READ OUT.

(11 maximum responses)

- 1 Gifts
- 2 Cosmetic goods
- 3 Furniture
- 4 Food
- 5 DIY / garden products

- 6 Household electrical goods (e.g. washing machines, hoovers, lamps)
- 7 Other electrical goods (e.g. TV, DVD players, cameras)
- 8 Clothing
- 9 Sporting / leisure products
- 10 Media (e.g. DVD, video, CD's)
- 11 Other (specify)

Demographics: Please READ OUT Statement:

Finally, I would like to ask you a few questions about yourself and your household. These are for survey control purposes only and the results will not be released identifying you by name.

Q26. Which of the following age bands do you fall into?

READ OUT. MARK ONE BOX ONLY.

- 1 18 – 24 years
- 2 25 – 34 years
- 3 35 – 44 years
- 4 45 – 54 years
- 5 55 – 64 years
- 6 65 years or above
- 7 Refused (DO NOT READ OUT)

Q27a. What is the occupation of the chief wage earner in your household?

**IF RETIRED, ASK FOR PREVIOUS OCCUPATION
IF REFUSED, PLEASE TYPE IN 'REFUSED'**

Q27b. SEG

- 1 A/B
- 2 C1
- 3 C2
- 4 D/E
- 5 Refused

Q28. Which of the following income bands does your household's gross annual income fall into? i.e. before tax

READ OUT. MARK ONE BOX ONLY.

- 1 Less than £10,000
- 2 £10,001 - £15,000
- 3 £15,001 - £20,000
- 4 £20,001 - £30,000
- 5 £30,001 - £40,000
- 6 £40,001 - £50,000
- 7 £50,000+
- 8 Don't know (DO NOT READ OUT)
- 9 Refused (DO NOT READ OUT)

Q29. Including yourself, how many people in your household are aged between:

READ OUT. MARK ONE BOX PER ROW.

- | | | | | | | | |
|--------|-------|-------|---------|--------|--------|---------------|-----------|
| 1 None | 2 One | 3 Two | 4 Three | 5 Four | 6 Five | 7 Six or more | 8 Refused |
|--------|-------|-------|---------|--------|--------|---------------|-----------|

(DO NOT
READ
OUT)

0-15 years	<input type="checkbox"/>								
16 years and over	<input type="checkbox"/>								

Q30. How many cars does your household own or have the use of?
MARK ONE BOX ONLY.

- 1 None
- 2 One
- 3 Two
- 4 Three or more
- 5 Refused (DO NOT READ OUT)

Q31. Gender of respondent
RECORD BY OBSERVATION

- 1 Male
- 2 Female

Q32. Would you be willing to be re-contacted for future quality control purposes?
INTERVIEWER NOTE: This will involve an interviewer contacting you and asking you a few brief questions to verify and monitor the quality of this call.

- 1 Yes
- 2 No

INTERVIEWERS PLEASE READ OUT TO ALL RESPONDENTS:

Thank you for participating in this survey. If you wish to check the credentials of RMG:Clarity, I can provide the telephone number for the Market Research Society, who will be able to verify our company.
Would you like to take the number? 0500 39 69 99

Please check your work because once you move on you will not be able to return to this record.

- 1 Checking (Return to start of survey)
- 2 Continue to end of survey

If = 2, set 'AgentName' to question 'S_AgentName'
If = 1, goto 'Auto Dial'

Enter your initials to complete the survey

Appendix C: Retail Review – Short Bibliography

- Aaker D. 2011. *Will retailing ever be the same? Harvard Business Review*
- BRC**, 2003, *Scotland A Land of Opportunity?*
- CBRE**, 2004, *Research Study on the effectiveness of NPPG8: Town Centres and Retailing*
- CBRE** 200? For the National Retail Planning Forum: *The Role and Vitality of Secondary Shopping – A New Direction*
- Chesbrough H.** 2011. *The Future of How we Consume Things. Harvard Business Review.*
- Colliers International.** 2013. *National Retail Barometer.*
- Colliers International.** 2013. *Shopping Centre Market Review.*
- Competition Commission.** 2007 - Grocery Market Investigation – *Report of Interim Findings*
- Competition Commission.** 2007 - Grocery Market Investigation – *Interim Findings – Appendix 3.1*
- Dawson J.** 2000. *Grocery Retailing in Scotland – The Next 10 Years* . Presentation to the Scottish Grocers' Federation.
- Dawson J.** 2002 *Current and Future Retail Structures in Scotland* in Royal Society of Edinburgh/Arhibald, Campbell and Harley Symposium of *The Future of Retailing*
- Dawson J.** 2004. *Retail Change in Britain during 30 years: The Strategic Use of Economies of Scale and Scope* in Centre for the Study of Retailing in Scotland – Research Paper No. 0402
- Dawson J.** 2006, *Retail Trends in Europe*, pp 41-58 in Kraff M. & Murali K *Retailing in the 21st century: Current and Future Trends.*
- DTZ.** 2011. *Assessing the contribution of retailing in Scotland. (for Scottish Government)*
- English Heritage** 2005: *Retail Development in Historic Areas*
- Experian.** 2012. *Retail Planner Briefing Note 10.1*
- Experian.** 2012. *Town Centre Futures 2020.*
- Favaro K & Hodson N.** 2011 *The end of History or Retail 3.0? Harvard Business Review.*
- GVA Grimley** – 2007. Harlow District Council – *Retail Study and Health Check*
- GVA 2012.** *Scottish Town Centres.*
- Lal R. & Alvarez J.** 2011. *Death Knell for Category Killers? Harvard Business Review*

Merholz P. 2011. *The Future of Retail? Look to its Past.* *Harvard Business Review.*

Mintel 2012. *Retail Rankings 2012.*

ONS Statistical Bulletin 2013. *Retail sales February 2012. March 2013.*

Pitney Bowes/Oxford Economic Forecasting. 2012. *Retail Expenditure Guide 2012/2013*

Price Waterhouse Coopers/tns Retail Forward 2007. *Retailing 2015: New Frontiers.*

Royal Borough of Kensington and Chelsea, Commission on Retail Conservation, 2006, *Retail Trends, Issues and Proposals.*

Ryden: *October/12 Scottish Property Review.* October 2012.

Sparks L. 2002. *Retailing in Scotland.*2001/2.

Sparks L. 2005. *The Scottish Market Place – Scottish, British or Global?* In *BRC Emerging Markets and Opportunities*

Sparks, L. 2006: *Retailing in Scotland: Retrospect and Prospect.* Presentation to I-DOX Seminar.

Teale M. CBRE. 2012. *Shop Expansion and the Internet.*

Uldrich J. 2012. *Is the future of retail here? Jump The Curve*

Verdict – 2007. *UK Retail Futures 2011 Forecasting Report.*

Verdict. 2011. *UK Retail 2012 & Beyond*

Also see **Hargest & Wallace,** 2007, *Town Centre and Retailing Methodologies – Working Paper 1: Literature Review.*

Appendix D: Strategic Retail Model Tables

See separate file

Appendix E: Strategic Retail Model Commentary

1 Strategic Retail Model

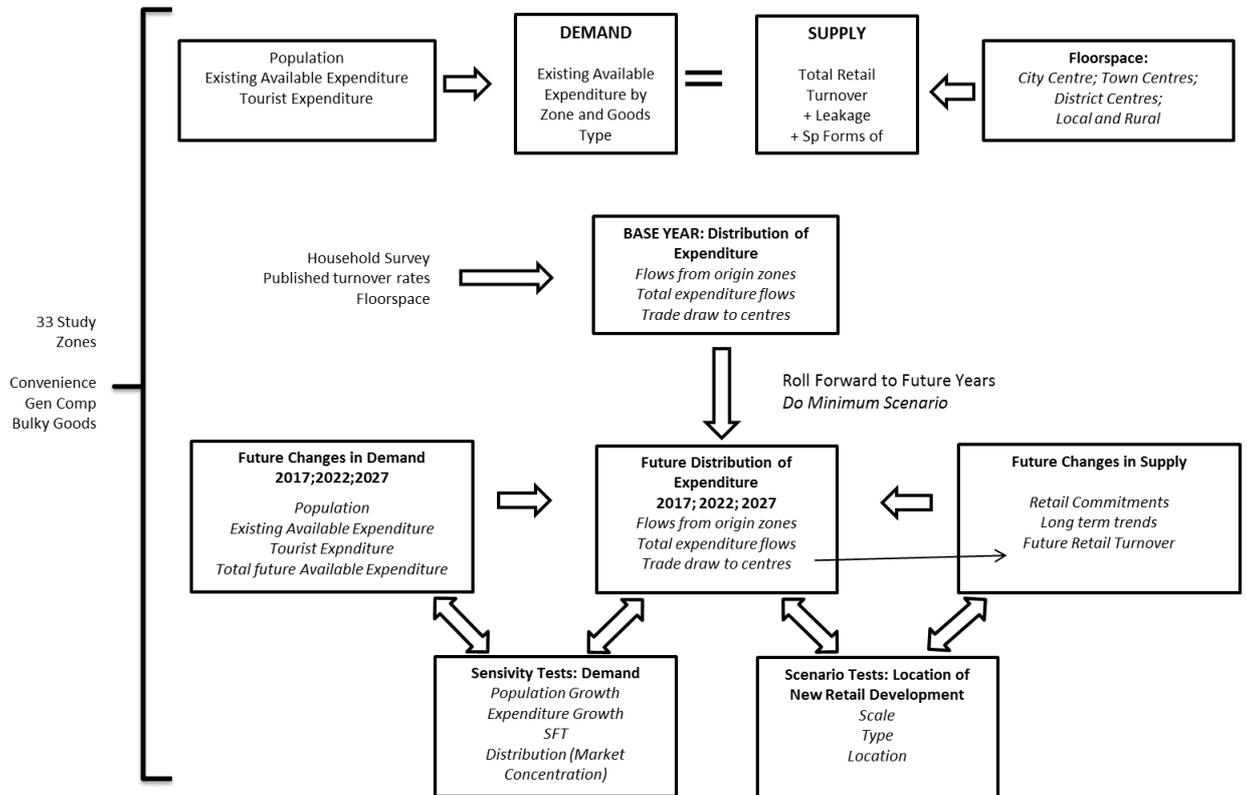
Overview

- 1.1 The purpose of the Strategic Retail Model (SRM) is to provide an analysis of the balance between demand and supply for retail expenditure/turnover within the study area for the period 2013-2027.
- 1.2 *Retail Demand.* Retail demand is expressed through changes in available expenditure arising from residents and visitors to Aberdeen City and Shire. The primary focus is on expenditure directed to the purchase of goods through conventional retail floorspace and therefore account is taken of expenditure demand that occurs through other “special forms” of retail trading including the internet. Demand also takes into account potential net inflows of expenditure from residents outwith the study area (but not staying tourists) including residents from Moray, Dundee and Angus Shetland and elsewhere.
- 1.3 *Retail Supply.* Retail supply is the retail turnover within existing and committed retail floorspace. It includes:
- Turnover in existing shops.
 - Turnover in “committed” future retail floorspace.
 - Purchases of goods through special forms of trading – as noted, this is discounted at the outset in the model.
 - Expenditure leakage – i.e. purchases of goods through shops outwith the study area.
- 1.4 It should be noted that “committed” floorspace has only been identified for the period to 2017 and therefore and changes in retail demand will be identified in the model thereafter are shown as changes in turnover in existing retail floorspace (i.e. changes in sales densities).
- 1.5 The principal components of the model are as follows:
- Use of 33 zones within the study area. These are used to identify areas of broadly similar retail characteristics and form the basic units for the identification of both retail demand and supply. Zones are grouped into four sub-regions – “highland” Aberdeenshire, coastal Aberdeenshire, Aberdeen City Housing Market Area (Aberdeenshire) – also referred to as “commuter”; and Aberdeen City.
 - Identification of demand through population forecasts and forecasts of changes in available expenditure per capita.
 - Disaggregation of retail into three broad categories – convenience, general comparison and bulky goods. It does *not* address the purchase of retail *services*.
 - Identification of expenditure flows from each zone to retail destinations. These flows are estimates from a combination of: household survey data; existing/committed retail floorspace; future changes in expenditure patterns (as a sensitivity test).

- Broad distribution of retail expenditure to existing/committed floorspace within general retail locations.

1.6 These issues are considered in further detail below. The overall structure of the model is set out in Figure 1 (from Working Paper 4).

Figure 1: Structure of Strategic Retail Model



1.7 The following paragraphs describe the components of the model by reference to the relevant Tables provided at Appendix D.

Available Expenditure Forecasts – Tables 1-5

1.8 Forecasts of available expenditure are based on:

$$\text{Total Available Expenditure} = [\text{Population Forecast} \times \text{Available Expenditure Per capita (less SFT)}] + \text{Net Tourist Expenditure}$$

Table 1: Population

1.9 Table 1 identifies the population forecast for each zone. The structure of the spreadsheet allows adoption of alternative sensitivity tests for population forecasts. The approach adopted for the forecast of population is as follows:

- Adoption of SDP population forecasts for Aberdeen City HMA and the Rural HMA. These are derived from 2008 GRO forecasts. These “global” forecasts have been adjusted to take account of under-forecasts identified from the 2011 Census.

- Allocation of the major strategic housing development allocations to individual study zones. Information of strategic sites and housing capacity was provided by the two planning authorities. Housing numbers were converted to estimated numbers of household and population.
- Pro-rata adjustment of zone populations to ensure that they comply with the global forecasts used for the SDP. The result of this is that, whereas some zones with major allocations would experience substantial population growth others, without major allocations, could result in modest population decline. Full details of the implications for individual zones are available.
- Sensitivity tests used: High Growth – as with the central case but using 2010-based GRO forecasts adjusted for 2011 census figures. Low Growth – as per Central case (i.e. 2008-based forecasts) but with no adjustment to reflect the data from 2011 Census.

Table 2: Available Expenditure Per Capita

- 1.10 Reports on expenditure were commissioned from Pitney Bowes for the four sub-regions in the study area. These reports provided expenditure figures for 2010 (gross of SFT) and forecasts for future years. The disaggregation of expenditure by type of goods allowed the identification of expenditure for convenience, general comparison and bulky goods. PB definitions of the goods categories were adopted for the study (and used for the identification of existing/committed floorspace).
- 1.11 As with the population forecasts the use of “look-up” tables within the spreadsheet allows the adoption of alternative forecasts for expenditure growth as sensitivity tests. These were adopted for *both* overall expenditure growth forecasts and for forecasts of the growth of special forms of trading as a percentage of total expenditure (per capita). Working Papers 3 and 4 have noted that there is substantial variation in forecasts between different forecasting organisations (especially for comparison goods) and the ability to adopt alternative forecasts, as sensitivity tests, is considered important when considering long term changes in expenditure demand and supply:
- The central case used was the *average* of Pitney Bowes Oxford Econometrics Forecasts and Experian Central Forecasts (both November 2012) for both expenditure per capita growth and special forms of trading. SFT forecasts took account of assumptions about the role of “click and collect” trade contributing to the turnover of stores.
 - The high growth forecast was PB OEF forecasts (2012/13) and the PB OEF central forecast for SFT growth.
 - The low growth forecast was Experian (Retail Planner 10.1) “Defensive Households” scenario plus Experian SFT forecast.
- 1.12 Table 2 therefore identifies available expenditure per capita net of SFT for each zone, each goods category type and for the period up to 2027. As emphasised in WPs 3&4 it should be noted that there is considerable uncertainty in the reliability of forecasts for the latter part of the study period (i.e. 2020-2027).

Table 3: Residents' Total Available Expenditure

1.13 Table 3 is the product of information from Table 1 (population) and Table 2 (available expenditure per capita). The Table therefore identifies total expenditure from residents for each zone, goods category and year from 2013 to 2027. The lower part of the table summarises this information for the four sub-zones.

Table 4: Tourists' Expenditure

1.14 In certain parts of the study area (notably in Deesside) spend by staying tourists will be a significant contribution to total retail spend. However, if the benefits of tourism spend are to be taken into account in the strategic model it is important that account is also taken of expenditure leakage by residents within the study area spending on retail goods when they are tourists in other parts of the UK and abroad. The SRM has therefore attempted to estimate the *net* retail spend by tourists i.e. income from tourists from outwith the study area less expenditure leakage from study area residents as tourists elsewhere.

1.15 Tourist retail expenditure income is derived from the following:

- Estimate of total stock of tourist accommodation by principal type – notably there is an important distinction between serviced accommodation (e.g. hotels) where tourists are not self-catering (and therefore retail spend is primarily on comparison goods) and unserviced where tourists would spend on both convenience and comparison goods. This is identified by study zone.
- Estimate of total visitor nights by principal categories of visitor accommodation by zone. This uses STEAM data on average occupancy rates for the City and Shire.
- Identification of average spend by tourists. STEAM 2011 identifies spend for (primarily) comparison goods¹ for both Aberdeen City and Aberdeenshire per visitor night. Convenience spend is estimated based on UK average convenience spend making allowance for a proportion of catering to be in restaurants/cafes etc.

1.16 It is accepted that this analysis is only an approximation of retail spend from this sector. However the total expenditure from this sector is identified to be £38m for comparison goods and £3m for convenience goods (city and shire). This figure is comparable to that identified from studies on the economic benefits of tourism retail spend for the study area.

1.17 Tourist retail expenditure leakage from residents is based on the following:

- GB average expenditure per capita on comparison goods as tourists is equivalent to £51.60 per capita.
- Data for England (UK is not available) implies that, approximately, 25% of all tourist accommodation nights are in unserviced accommodation and the remainder serviced. Making assumptions regarding the average number of nights spend away from home, the proportion of these in unserviced accommodation and an allowance for eating out (rather than self-catering) allows a rough estimate of, on average, approximately £8 per capita per annum spent on convenience goods as a tourist.

¹ “Buying clothes” and “Other shopping”.

- 1.18 These figures are multiplied by the population of zones to provide tourist expenditure leakage.
- 1.19 This calculation provides an estimate of tourist expenditure leakage which is £17.6m for comparison goods and £4.1m for convenience goods.
- 1.20 This analysis does not take into account the spend of day visitors travelling to the study area as part of a holiday staying in a nearby area (e.g. from Moray). This is likely to be comparable to, and cancelled out by, the loss of spend from tourists staying in the study area having day-trips to locations outwith the study area. Day visitors who are residents and spend in the study area are taken into account in the expenditure flow information (see below).
- 1.21 This approach estimates that there is a net inflow of tourist expenditure into the study area on retail goods of £20m for comparison goods and -£1m for convenience goods. Examination of recent tourist expenditure data (2001-11) does not indicate any clear pattern regarding change in spend and, therefore, for the purpose of the model, it is assumed that this figure remains constant through the study period. The zones with the greatest proportion of net retail spend are, not surprisingly, in the highland parts of Aberdeenshire. However, for the study area as a whole the effect of tourism spend is very small compared to expenditure from residents.

Total Available Expenditure

- 1.22 Table 5 combines the information from residents' expenditure (Table 3) and tourist expenditure (Table 4) for each zone for all of the goods categories and for the period 2013-2027.

Expenditure Flows – Tables 6 to 17

- 1.23 Tables 6-17 set out the information on expenditure flows between origin zones and retail locations. Each table considers one type of retail good (i.e. convenience, general comparison and bulky goods) and one year of assessment (2013, 2017, 2022 and 2027) providing 12 tables in total. The tables are in three parts:
- Part A identifies the percentage distribution of expenditure for each zone. The total reading across each row therefore sums to 100% i.e. accounting for all available expenditure generated in each zone.
 - Part B converts this percentage distribution into expenditure. The sum at the bottom of each column therefore identifies the total expenditure directed to a location and is, therefore, equivalent to the turnover of each location.
 - Part C converts the total expenditure from each zone to each centre (i.e. from Part B) to the equivalent percentage of the turnover of the retail location i.e. this allows the identification of trade draw to each location.
- 1.24 The tables therefore provide two sets of key information used for understanding the characteristics of retail within the study area:
- Part A allows one to understand where expenditure from each Zone is directed to and, from this, the relative importance of different centres to zones. By way of example from Table 6A this shows that

slightly over one third (35%) of convenience goods expenditure from Zone 1+3 is directed to retail locations in Banchory, 25% to Aboyne, 13% to Ballater and a further 15% to other local shops. If, therefore, a retail proposal is proposed that has an unduly adverse impact on convenience shops in Banchory the table indicates that this could have a significant effect on the access of retail of those living in Zone 1+3 i.e. some distance from the town of Banchory itself.

- Part C identifies the relative importance of a specific zone to the future fortunes of a centre. Using the same example as above Table 6C shows that, despite the relative importance of Banchory to residents of Zone 1+3 for convenience goods this Zone only accounts for 19% of the turnover of shops in Banchory – the lower percentage in this case reflects the comparatively low population in Zone 1+3 compared to other zones. This allows one to identify the principal and secondary catchment areas of a centre (subject, of course, to the limitations of the relative size of the zones used in the model). It also shows that, if a key part of the catchment for a centre is subject to high population growth then this will have a significant (beneficial) impact on the future turnover of a retail location.

Available Expenditure

- 1.25 The second column of Parts A & B of these Tables identifies the total available expenditure for the relative category of goods for the relevant year. This is taken direct from Table 5. It should be noted that the structure of these tables means that the model assumes that tourists staying in a zone will adopt the same expenditure patterns as residents. This could be argued to be unrealistic with tourists more likely to spend locally than residents and therefore resulting in an underestimate of turnover in areas where tourism is important. This is accepted but the relatively importance of tourism spend is low and so the impact on the turnover estimates is likely to be limited.

Retail Locations

- 1.26 The top row of each part of these tables identifies principal retail locations. These are not necessarily the largest/highest turnover locations but identify those locations identified to be significant given the geography of the study area – in this way relatively small retail locations are identified in rural areas because these are significant in terms of retail distribution in these parts of the study area.
- 1.27 In these tables the retail locations do not necessarily correspond to town *centres*. This is because for comparison goods in particular the public's understanding of a defined town centre is often limited. This is particularly the case in the Shire towns where respondents to the household survey would identify a town as a shopping destination rather than the centre of that town. In Aberdeen this issue is less acute because many of the principal retail locations are clearly defined retail centres/retail parks that are well understood by respondents. The disaggregation of expenditure and turnover between town/district centre and out-of-centre within these locations is addressed in the final part of the SRM (Tables 18-21).

Expenditure Distribution

- 1.28 The identification of expenditure distribution is an important part of the SRM. The identification of this is derived from three key sources:

- *Household Survey.* The Household Survey is of key importance. The result of this in terms of expenditure distribution was reported in WP5 and the method used for the identification of this distribution was also described in WP5. These results are a key starting point for the identification of expenditure distribution.
- *Floorspace and Turnover.* The second key stage was a consideration of the implications of household survey results for turnover for the existing and committed floorspace identified within each retail location. It is recognised that there are limitations with the accuracy of household survey data reflecting both survey design (which results in over-reporting of trips to major retail locations and under-reporting of local/neighbourhood shopping trips) and imperfect knowledge of shopping trips/expenditure by respondents. Therefore there is a process of adjustment undertaken to the household survey results under the identification of expenditure flows.
- *Further adjustments.* Further adjustments are undertaken including the exclusion of unusual responses. The limited size of samples results in, a limited number of cases, unusual responses being given undue prominence. For example residents in Cove identifying main food shopping trips to Huntly. These responses are not incorrect but the identification of even 1% expenditure from Cove to Huntly would overstate the significance of these types of trips. In these cases unusual responses have been excluded from the expenditure flows. A second further adjustment is to provide a general consistency on patterns of flow from neighbouring/similar zones. This is particularly important for comparison goods expenditure. These types of adjustments reflect the limited sizes of samples used for the household survey – however the full removal of such imperfections in the outputs of the household survey would require samples many times larger than were undertaken for the study.

1.29 The retail model is, however, a *strategic* model rather than detailed local model and, for this type of analysis it is considered that the expenditure flows identified are an accurate representation of expenditure movements within the study area.

Leakage and Inflows

- 1.30 Expenditure flows from study zones to locations outwith the study area (expenditure leakage) are identified in the right hand columns of Parts A and B of the Tables. Leakage is particularly significant for locations close to Moray (Zones 2 and 4+5) and Angus (especially Zone 22). For comparison goods a small level of expenditure leakage is identified across the whole of the study area in recognition that a significant number of residents undertake occasional trips to larger centres (notably Glasgow) but also to Dundee and Inverness. Total leakage in 2013 is estimated to be £24m for convenience goods, £72 for general comparison and £6m for bulky goods. Information on leakage is identified primarily from the household survey.
- 1.31 Inflows of expenditure (excluding tourist related expenditure identified in Table 4) is identified in the bottom rows of Part B. This information is not available from surveys undertaken for the study. Estimates of expenditure flows from Moray are provided in the 2008 Moray Retail Study which included a household

survey similar to that used for the current study. Although a retail study was undertaken in 2006 for the Dundee City Region this did not identify expenditure from the Dundee region to Aberdeen. Similarly no information is available for either Highland, Orkney or Shetland. As a result limited reliability can be placed on the estimates of expenditure inflow from residents in these areas with the exception of Moray. The Tables assume inflows of £4m for convenience goods, £81m for general comparison goods and £10m for bulky goods. Most of this is identified to originate from Moray residents.

- 1.32 Excluding tourist expenditure (which identified a net inflow of £19m for all goods) the model identifies a net outflow of £17m. In overall terms therefore the model identifies from all sources a broad balancing of net inflows and outflows.

Future Changes

- 1.33 Tables 9 – 17, for 2017, 2022 and 2027, do not assume changes in the patterns of expenditure flows as a result of general social/retailing habits. These issues, notably the potential for increased market concentration, are considered as one of the sensitivity tests for the model. Working Paper 3 identified that there has been a significant increase in concentration of retail activity into larger stores, larger centres and larger businesses over the past few decades. In the case of convenience goods shopping this has primarily been into larger supermarkets and superstores often located in freestanding out-of-centre locations. In the last 10 years or so this has not led to a greater proportion of convenience spend in larger *centres* indeed the pressure for increased market share has resulted in major retailers providing larger format stores in smaller towns and Aberdeenshire has experienced this trend.
- 1.34 In contrast the market share of larger centres (major town and city centres as well as out-of-centre retail parks and other purpose built shopping facilities) for comparison goods (especially general comparison) has increased. However it is not clear to what extent the increased floorspace and turnover in these larger locations is the cause or effect of market concentration. It is quite likely that it is both cause and effect – greater mobility and ease of travel will favour concentration but the provision of new shopping facilities with larger units offering a wider range of products, greater choice and a generally higher quality of shopping environment, will also increase trade draw to these locations further increasing market concentration. Therefore without improved shopping provision one cannot automatically assume increased market share in the major centres.
- 1.35 A number of retail commitments have been identified for both the City and Shire. These are identified in 1. The development of this floorspace will have a direct impact on expenditure patterns with expenditure being redirected (diverted) from existing floorspace. The impacts are identified and included within the expenditure patterns for 2017 to 2027. Adjustments to expenditure flow patterns are based on professional judgement since there is no survey evidence available for future years. These changes in expenditure flows can be interpreted as an assessment of retail impact (by comparing turnover in 2017 using 2013 expenditure flows with 2017 with the altered flows) but because of the strategic nature of retail model proposals for new retail floorspace of the scale proposed would need to have appropriately detailed retail impact assessments.

Comment on Forecast Future Turnover

- 1.36 Because the retail model assumes generally similar patterns of expenditure flow the effect of forecast increases in available expenditure (especially for comparison goods) results in significant and comparatively rapid increases in turnover in retail locations. This is seen in Section 2 of this Working Paper. However whereas additional floorspace is identified for the period 2013-2017 from retail commitments no further floorspace is identified for the period after 2017. As a result of this the model “forecasts” increases in sales densities in line with increases in available expenditure. These forecasts of future turnover in centres (for years 2022 and 2027) must be treated with some caution. Not only is there uncertainty about the reliability of forecasts of expenditure growth in the long term but the flow of expenditure to these centres is also dependent upon the attractiveness of the centres as a place to shop in absolute terms and compared to other centres. The assumption of maintaining expenditure flow patterns assumes that retail locations maintain their attractiveness in relative terms. To an extent this must also include improvements to the range of shopping within centres. Without this improvement in retail offer the implications of the growth of expenditure are that sales densities will increase substantially in real terms i.e. there will be a lot more shopping undertaken in the same floorspace. Without improvements this is unlikely to be the case – increased turnover implies increased footfall and business which, in many cases, will lead to a deterioration of the shopping experience which may encourage shoppers to travel elsewhere or could, in theory, act to dampen demand growth for retail in favour of other ways of spending time and money (e.g. on leisure pursuits).
- 1.37 Therefore, although the model seeks to forecast the “actual” future turnover in retail locations and centres, these figures need to be treated with caution recognising the assumptions that underpin the forecasts. This issue is revisited in the consideration of quantitative retail deficiencies in Section 5 of this Working Paper.

Floorspace and Turnover

- 1.38 Tables 6-17 consider general retail locations. Tables 18A to 21A identify the implications of expenditure flows for the retail floorspace within each zone for each of 2013 (Table 18A), 2017 (19A), 2022 (20A) and 2027 (21A). There is a Part B for each of these Tables included within the spreadsheets which summarise overall floorspace and turnover for each centre/zone but these are not reproduced in Appendix A because they do not provide any additional information not already provided.

Floorspace

- 1.39 Data on retail floorspace has been provided by the Grampian Assessor. This data therefore represents the position in 2013 (or in some cases 2012). For this study this information is taken to represent the current (2013) position. For larger stores, including supermarkets and superstores, this information has been combined with planning data and survey information on net floorspace and the split between different retail goods categories.
- 1.40 For all retail units Assessor data identifies names of occupiers, operators, gross floor area and address/postcode. In many cases the type of operator is identified from Assessor’s information but where this is not possible the split between different types of retail goods has been estimated using information on the retail split obtained by surveys of the principal centres undertaken by HPL.

- 1.41 Non-retail goods units are excluded from the data set. In this way uses identified as retail by the Assessor (and also included within Class 1 of the Use Classes Order) such as funeral directors are not included within the data. Information on retail service units (consistent with Goad definitions) are excluded from retail goods floorspace but are included in Tables 18-21 to allow identification of the retail mix within centres.
- 1.42 As would be expected there are significant changes between the floorspace identified for 2013 compared to 2004. For most locations this reflects actual changes in retail floorspace and, for principal retail centres, this will be identified in the review of the centres included within the final report. However in certain areas, notably within Aberdeen City but outwith defined centres, the Assessor data identifies significant changes (reductions mainly) in floorspace. In certain areas these changes reflect an inconsistency in the data between that provided for the 2004 study and the 2013 study. This does not, however, affect any of the defined city, district, or retail park locations.

Turnover

- 1.43 Tables 18 to 21 include estimates of turnover for floorspace within all the defined retail centres and other locations. These estimates are based on a general allocation of expenditure to all retail units within the retail location identified for each goods category in Tables 6-17. For example Table 6B identifies £30.3m convenience turnover to Huntly plus an additional £1.5m local spend by residents in Zone 4+5 – a total of £31.7m. Table 18A uses this figure to identify total convenience spend for *all* shops in Huntly – town centre and all out-of-centre stores. The precise allocation between stores is based on an analysis of notional average turnover for these stores to identify the market share of individual shops within Huntly (e.g. Asda would be expected to have 39% of convenience market share). This market share, when applied to the total available expenditure directed to Huntly, allows an estimate of actual turnover in the store. In this case the implied turnover for all convenience shops in Huntly is well below notional average levels reflecting the high level of convenience floorspace provision in this small market. This approach is a broad strategic estimate – it does not take into account potential detailed factors that could, for example, result in Asda trading much higher (or lower) than Tesco. This approach is considered valid because it is considered that only limited reliability can be placed on the results of the household survey for turnover of individual shops. This approach is also consistent with adopting a strategic approach to assessing retailing within the study area.
- 1.44 The notional average trading levels are provided in reference tables have not been reproduced in Appendix A. Because new floorspace is introduced in 2017 the relative proportion of turnover for individual stores is altered for 2017 to 2027.
- 1.45 Although Tables 18-21 cannot be relied upon for the identification of actual turnover for individual shops they do provide good estimates of the turnover of different retail locations including the city centre, town and district centres and retail park locations. They also allow the identification of the relative importance of these locations compared to dispersed floorspace whether in the city or across rural areas. For example it shows:
- Aberdeen City centre in 2013 accounts for 9% of convenience turnover, 60% of general comparison turnover and 25% of bulky goods turnover of the study area. However, as a result of retail commitments located outwith the city centre the market share for general comparison goods will decrease to 58% in 2017.

- 49% of convenience turnover is in locations within the shire (i.e. 51% in the city) but the split for general comparison goods is 23% to 77% and for bulky goods it is 34% to 66%.

1.46 Comparison between Tables 18-21 allow the identification of forecast changes in retail turnover based on the assumptions used in the SRM.

**ABERDEEN CITY AND ABERDEENSHIRE STRATEGIC RETAIL MODEL
VERSION 2.0 - 2013**

TABLE 1: POPULATION

Scenario	Test no.	Description
2013	3	Central
2017	6	Central
2022	9	Central
2027	12	Central

Zone	Population				
	2011	2013	2017	2022	2027
1+3	8143	8225	8249	8445	8578
2	6026	6086	5709	5559	5590
4+5	14250	14394	14632	14179	14245
6	7722	7800	7714	8120	8291
7	15125	15278	14863	14872	15038
8	3675	3712	3453	3329	3341
9	5036	5087	4696	4528	4544
10	23692	23932	24339	24584	24904
11	24896	25148	25524	26007	26391
12	8638	8725	9872	10712	10998
13	16905	17076	17633	17476	17637
14	8838	8928	8781	9839	10160
15	19211	19406	20175	20082	20284
16	18001	18184	18569	18715	18950
17	7323	7397	6918	6671	6695
18	13782	13921	13123	12802	12878
19	16453	16598	16383	16711	16872
20E	3950	3990	8306	11450	12207
20W	5051	5102	4699	4531	4548
21	10507	10614	10353	10208	10292
22	13460	13596	14836	15592	15916
23	5333	5373	5920	5868	5860
24N	6351	6398	5844	5793	5785
24S	7641	7698	12868	14455	15621
25	17081	17207	21165	23954	27143
26	35835	36100	33527	33234	33186
27	17596	17726	16191	16050	16027
28	28104	28311	27057	27316	27833
29N	23864	24040	27833	28793	28994
29S	22220	22384	20631	20451	20421
30	35243	35504	32431	32147	32101
31	10228	10332	9529	9189	9222
32	15619	15734	16502	16924	17014
Total	475800	480005	488326	498588	507565

Areas	Population				
	2011	2013	2017	2022	2027
Highland Zones 1-5	28418	28705	28589	28184	28413
Coastal Zones 6-12	88784	89682	90461	92153	93508
Commuter Zones 13-22, 31	143711	145143	149305	153267	155660
City Zones 23-30, 32	214888	216474	219971	224984	229984
Total	475800	480005	488326	498588	507565

TABLE 2: RESIDENTS' AVAILABLE EXPENDITURE PER CAPITA
2011 Prices Net SFT

Scenario	Test no.	Description
	5	
Annual Growth Rates		Average OEF Central & Experian Central
Special Forms of Trading Assumption		Average OEF Central & Experian Central

Zone	Available Expenditure Per Capita														
	Convenience Goods					General Comparison Goods					Bulky Goods				
	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027
1+3	£2,064	£2,064	£2,113	£2,183	£2,267	£2,252	£2,321	£2,640	£3,142	£3,774	£483	£498	£566	£674	£813
2	£2,064	£2,064	£2,113	£2,183	£2,267	£2,252	£2,321	£2,640	£3,142	£3,774	£483	£498	£566	£674	£813
4+5	£2,064	£2,064	£2,113	£2,183	£2,267	£2,252	£2,321	£2,640	£3,142	£3,774	£483	£498	£566	£674	£813
6	£2,013	£2,013	£2,060	£2,129	£2,211	£2,133	£2,199	£2,502	£2,977	£3,576	£457	£471	£536	£637	£769
7	£2,013	£2,013	£2,060	£2,129	£2,211	£2,133	£2,199	£2,502	£2,977	£3,576	£457	£471	£536	£637	£769
8	£2,013	£2,013	£2,060	£2,129	£2,211	£2,133	£2,199	£2,502	£2,977	£3,576	£457	£471	£536	£637	£769
9	£2,013	£2,013	£2,060	£2,129	£2,211	£2,133	£2,199	£2,502	£2,977	£3,576	£457	£471	£536	£637	£769
10	£2,013	£2,013	£2,060	£2,129	£2,211	£2,133	£2,199	£2,502	£2,977	£3,576	£457	£471	£536	£637	£769
11	£2,013	£2,013	£2,060	£2,129	£2,211	£2,133	£2,199	£2,502	£2,977	£3,576	£457	£471	£536	£637	£769
12	£2,013	£2,013	£2,060	£2,129	£2,211	£2,133	£2,199	£2,502	£2,977	£3,576	£457	£471	£536	£637	£769
13	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
14	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
15	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
16	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
17	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
18	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
19	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
20E	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
20W	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
21	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
22	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
23	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837
24N	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837
24S	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837
25	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837
26	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837
27	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837
28	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837
29N	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837
29S	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837
30	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837
31	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
32	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837

Areas	Available Expenditure Per Capita															
	Convenience Goods					General Comparison Goods					Bulky Goods					
	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027	
Highland	Zones 1-5	£2,064	£2,064	£2,113	£2,183	£2,267	£2,252	£2,321	£2,640	£3,142	£3,774	£483	£498	£566	£674	£813
Coastal	Zones 6-12	£2,013	£2,013	£2,060	£2,129	£2,211	£2,133	£2,199	£2,502	£2,977	£3,576	£457	£471	£536	£637	£769
Commuter	Zones 13-22, 31	£2,069	£2,069	£2,118	£2,188	£2,272	£2,368	£2,441	£2,777	£3,305	£3,970	£492	£507	£577	£686	£828
City	Zones 23-30, 32	£2,131	£2,131	£2,181	£2,253	£2,340	£2,318	£2,389	£2,718	£3,234	£3,884	£497	£512	£583	£694	£837

TABLE 3: RESIDENTS TOTAL AVAILABLE EXPENDITURE
2011 Prices. Net SFT

Zone	Available Expenditure Per Capita														
	Convenience Goods					General Comparison Goods					Bulky Goods				
	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027
1+3	£16.8m	£17.0m	£17.4m	£18.4m	£19.4m	£18.3m	£19.1m	£21.8m	£26.5m	£32.4m	£3.9m	£4.1m	£4.7m	£5.7m	£7.0m
2	£12.4m	£12.6m	£12.1m	£12.1m	£12.7m	£13.6m	£14.1m	£15.1m	£17.5m	£21.1m	£2.9m	£3.0m	£3.2m	£3.7m	£4.5m
4+5	£29.4m	£29.7m	£30.9m	£30.9m	£32.3m	£32.1m	£33.4m	£38.6m	£44.6m	£53.8m	£6.9m	£7.2m	£8.3m	£9.6m	£11.6m
6	£15.5m	£15.7m	£15.9m	£17.3m	£18.3m	£16.5m	£17.2m	£19.3m	£24.2m	£29.6m	£3.5m	£3.7m	£4.1m	£5.2m	£6.4m
7	£30.4m	£30.8m	£30.6m	£31.7m	£33.2m	£32.3m	£33.6m	£37.2m	£44.3m	£53.8m	£6.9m	£7.2m	£8.0m	£9.5m	£11.6m
8	£7.4m	£7.5m	£7.1m	£7.1m	£7.4m	£7.8m	£8.2m	£8.6m	£9.9m	£11.9m	£1.7m	£1.7m	£1.8m	£2.1m	£2.6m
9	£10.1m	£10.2m	£9.7m	£9.6m	£10.0m	£10.7m	£11.2m	£11.7m	£13.5m	£16.2m	£2.3m	£2.4m	£2.5m	£2.9m	£3.5m
10	£47.7m	£48.2m	£50.1m	£52.3m	£55.1m	£50.5m	£52.6m	£60.9m	£73.2m	£89.0m	£10.8m	£11.3m	£13.0m	£15.7m	£19.1m
11	£50.1m	£50.6m	£52.6m	£55.4m	£58.3m	£53.1m	£55.3m	£63.9m	£77.4m	£94.4m	£11.4m	£11.8m	£13.7m	£16.6m	£20.3m
12	£17.4m	£17.6m	£20.3m	£22.8m	£24.3m	£18.4m	£19.2m	£24.7m	£31.9m	£39.3m	£3.9m	£4.1m	£5.3m	£6.8m	£8.5m
13	£35.0m	£35.3m	£37.3m	£38.2m	£40.1m	£40.0m	£41.7m	£49.0m	£57.8m	£70.0m	£8.3m	£8.7m	£10.2m	£12.0m	£14.6m
14	£18.3m	£18.5m	£18.6m	£21.5m	£23.1m	£20.9m	£21.8m	£24.4m	£32.5m	£40.3m	£4.3m	£4.5m	£5.1m	£6.8m	£8.4m
15	£39.7m	£40.2m	£42.7m	£43.9m	£46.1m	£45.5m	£47.4m	£56.0m	£66.4m	£80.5m	£9.4m	£9.8m	£11.6m	£13.8m	£16.8m
16	£37.2m	£37.6m	£39.3m	£40.9m	£43.1m	£42.6m	£44.4m	£51.6m	£61.9m	£75.2m	£8.9m	£9.2m	£10.7m	£12.8m	£15.7m
17	£15.2m	£15.3m	£14.7m	£14.6m	£15.2m	£17.3m	£18.1m	£19.2m	£22.0m	£26.6m	£3.6m	£3.8m	£4.0m	£4.6m	£5.5m
18	£28.5m	£28.8m	£27.8m	£28.0m	£29.3m	£32.6m	£34.0m	£36.4m	£42.3m	£51.1m	£6.8m	£7.1m	£7.6m	£8.8m	£10.7m
19	£34.0m	£34.3m	£34.7m	£36.6m	£38.3m	£39.0m	£40.5m	£45.5m	£55.2m	£67.0m	£8.1m	£8.4m	£9.4m	£11.5m	£14.0m
20E	£8.2m	£8.3m	£17.6m	£25.1m	£27.7m	£9.4m	£9.7m	£23.1m	£37.8m	£48.5m	£1.9m	£2.0m	£4.8m	£7.9m	£10.1m
20W	£10.5m	£10.6m	£10.0m	£9.9m	£10.3m	£12.0m	£12.5m	£13.1m	£15.0m	£18.1m	£2.5m	£2.6m	£2.7m	£3.1m	£3.8m
21	£21.7m	£22.0m	£21.9m	£22.3m	£23.4m	£24.9m	£25.9m	£28.8m	£33.7m	£40.9m	£5.2m	£5.4m	£6.0m	£7.0m	£8.5m
22	£27.9m	£28.1m	£31.4m	£34.1m	£36.2m	£31.9m	£33.2m	£41.2m	£51.5m	£63.2m	£6.6m	£6.9m	£8.6m	£10.7m	£13.2m
23	£11.4m	£11.4m	£12.9m	£13.2m	£13.7m	£12.4m	£12.8m	£16.1m	£19.0m	£22.8m	£2.7m	£2.8m	£3.5m	£4.1m	£4.9m
24N	£13.5m	£13.6m	£12.7m	£13.1m	£13.5m	£14.7m	£15.3m	£15.9m	£18.7m	£22.5m	£3.2m	£3.3m	£3.4m	£4.0m	£4.8m
24S	£16.3m	£16.4m	£28.1m	£32.6m	£36.6m	£17.7m	£18.4m	£35.0m	£46.7m	£60.7m	£3.8m	£3.9m	£7.5m	£10.0m	£13.1m
25	£36.4m	£36.7m	£46.2m	£54.0m	£63.5m	£39.6m	£41.1m	£57.5m	£77.5m	£105.4m	£8.5m	£8.8m	£12.3m	£16.6m	£22.7m
26	£76.4m	£76.9m	£73.1m	£74.9m	£77.7m	£83.0m	£86.2m	£91.1m	£107.5m	£128.9m	£17.8m	£18.5m	£19.5m	£23.1m	£27.8m
27	£37.5m	£37.8m	£35.3m	£36.2m	£37.5m	£40.8m	£42.3m	£44.0m	£51.9m	£62.3m	£8.7m	£9.1m	£9.4m	£11.1m	£13.4m
28	£59.9m	£60.3m	£59.0m	£61.5m	£65.1m	£65.1m	£67.6m	£73.5m	£88.3m	£108.1m	£14.0m	£14.5m	£15.8m	£18.9m	£23.3m
29N	£50.9m	£51.2m	£60.7m	£64.9m	£67.8m	£55.3m	£57.4m	£75.6m	£93.1m	£112.6m	£11.9m	£12.3m	£16.2m	£20.0m	£24.3m
29S	£47.4m	£47.7m	£45.0m	£46.1m	£47.8m	£51.5m	£53.5m	£56.1m	£66.1m	£79.3m	£11.0m	£11.5m	£12.0m	£14.2m	£17.1m
30	£75.1m	£75.7m	£70.7m	£72.4m	£75.1m	£81.7m	£84.8m	£88.1m	£104.0m	£124.7m	£17.5m	£18.2m	£18.9m	£22.3m	£26.9m
31	£21.2m	£21.4m	£20.2m	£20.1m	£21.0m	£24.2m	£25.2m	£26.5m	£30.4m	£36.6m	£5.0m	£5.2m	£5.5m	£6.3m	£7.6m
32	£33.3m	£33.5m	£36.0m	£38.1m	£39.8m	£36.2m	£37.6m	£44.8m	£54.7m	£66.1m	£7.8m	£8.1m	£9.6m	£11.7m	£14.2m

Areas	Available Expenditure Per Capita														
	Convenience Goods					General Comparison Goods					Bulky Goods				
	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027
Highland															
Coastal															
Commuter															
City															
Zones 1-5	£58.7m	£59.3m	£60.4m	£61.5m	£64.4m	£64.0m	£66.6m	£75.5m	£88.6m	£107.2m	£13.7m	£14.3m	£16.2m	£19.0m	£23.1m
Zones 6-12	£178.7m	£180.5m	£186.4m	£196.2m	£206.7m	£189.4m	£197.2m	£226.3m	£274.3m	£334.4m	£40.6m	£42.2m	£48.5m	£58.7m	£71.9m
Zones 13-22, 31	£297.3m	£300.3m	£316.2m	£335.3m	£353.7m	£340.4m	£354.3m	£414.7m	£506.5m	£617.9m	£70.7m	£73.6m	£86.1m	£105.2m	£128.8m
Zones 23-30, 32	£457.9m	£461.3m	£479.7m	£506.9m	£538.2m	£498.0m	£517.2m	£597.8m	£727.6m	£893.4m	£106.8m	£110.9m	£128.2m	£156.1m	£192.4m

TABLE 4: TOURIST AVAILABLE EXPENDITURE
2011 Prices

Zone	TOURIST EXPENDITURE Constant through study period			LEAKAGE OF EXPENDITURE Constant through study period			NET TOURIST EXPENDITURE Constant through study period		
	Convenience	Gen Comparison	Bulky Goods	Convenience	Gen Comparison	Bulky Goods	Convenience	Gen Comparison	Bulky Goods
1+3	£0.48m	£2.44m	£0.00m	£0.07m	£0.30m	£0.00m	£0.41m	£2.14m	£0.00m
2	£0.13m	£0.75m	£0.00m	£0.05m	£0.22m	£0.00m	£0.08m	£0.52m	£0.00m
4+5	£0.24m	£1.17m	£0.00m	£0.12m	£0.53m	£0.00m	£0.12m	£0.64m	£0.00m
6	£0.03m	£0.36m	£0.00m	£0.07m	£0.29m	£0.00m	-£0.03m	£0.07m	£0.00m
7	£0.24m	£1.57m	£0.00m	£0.13m	£0.56m	£0.00m	£0.11m	£1.01m	£0.00m
8	£0.00m	£0.12m	£0.00m	£0.03m	£0.14m	£0.00m	-£0.03m	-£0.02m	£0.00m
9	£0.00m	£0.17m	£0.00m	£0.04m	£0.19m	£0.00m	-£0.04m	-£0.02m	£0.00m
10	£0.10m	£1.10m	£0.00m	£0.20m	£0.88m	£0.00m	-£0.10m	£0.22m	£0.00m
11	£0.08m	£1.31m	£0.00m	£0.21m	£0.92m	£0.00m	-£0.13m	£0.39m	£0.00m
12	£0.06m	£0.45m	£0.00m	£0.07m	£0.32m	£0.00m	-£0.02m	£0.13m	£0.00m
13	£0.01m	£0.61m	£0.00m	£0.15m	£0.63m	£0.00m	-£0.13m	-£0.02m	£0.00m
14	£0.00m	£0.34m	£0.00m	£0.08m	£0.33m	£0.00m	-£0.08m	£0.01m	£0.00m
15	£0.04m	£0.61m	£0.00m	£0.17m	£0.71m	£0.00m	-£0.12m	-£0.10m	£0.00m
16	£0.01m	£0.91m	£0.00m	£0.15m	£0.67m	£0.00m	-£0.15m	£0.24m	£0.00m
17	£0.01m	£0.32m	£0.00m	£0.06m	£0.27m	£0.00m	-£0.05m	£0.04m	£0.00m
18	£0.00m	£0.40m	£0.00m	£0.12m	£0.51m	£0.00m	-£0.12m	-£0.11m	£0.00m
19	£0.01m	£0.69m	£0.00m	£0.14m	£0.61m	£0.00m	-£0.13m	£0.08m	£0.00m
20N	£0.02m	£0.20m	£0.00m	£0.03m	£0.15m	£0.00m	-£0.01m	£0.06m	£0.00m
20S	£0.02m	£0.20m	£0.00m	£0.04m	£0.19m	£0.00m	-£0.02m	£0.02m	£0.00m
21	£0.00m	£0.60m	£0.00m	£0.09m	£0.39m	£0.00m	-£0.09m	£0.21m	£0.00m
22	£0.12m	£0.81m	£0.00m	£0.12m	£0.50m	£0.00m	£0.01m	£0.31m	£0.00m
23	£0.14m	£1.03m	£0.00m	£0.05m	£0.20m	£0.00m	£0.09m	£0.83m	£0.00m
24N	£0.07m	£1.91m	£0.00m	£0.05m	£0.23m	£0.00m	£0.01m	£1.67m	£0.00m
24S	£0.07m	£1.91m	£0.00m	£0.07m	£0.28m	£0.00m	£0.00m	£1.62m	£0.00m
25	£0.14m	£1.10m	£0.00m	£0.15m	£0.63m	£0.00m	-£0.01m	£0.47m	£0.00m
26	£0.14m	£2.80m	£0.00m	£0.31m	£1.32m	£0.00m	-£0.17m	£1.48m	£0.00m
27	£0.14m	£1.68m	£0.00m	£0.15m	£0.65m	£0.00m	-£0.01m	£1.03m	£0.00m
28	£0.14m	£1.59m	£0.00m	£0.24m	£1.04m	£0.00m	-£0.11m	£0.55m	£0.00m
29N	£0.07m	£1.85m	£0.00m	£0.20m	£0.88m	£0.00m	-£0.14m	£0.97m	£0.00m
29S	£0.07m	£1.85m	£0.00m	£0.19m	£0.82m	£0.00m	-£0.12m	£1.03m	£0.00m
30	£0.11m	£4.50m	£0.00m	£0.30m	£1.30m	£0.00m	-£0.19m	£3.20m	£0.00m
31	£0.14m	£0.84m	£0.00m	£0.13m	£0.38m	£0.00m	£0.00m	£0.46m	£0.00m
32	£0.07m	£1.82m	£0.00m	£0.13m	£0.58m	£0.00m	-£0.07m	£1.25m	£0.00m
	£2.89m	£38.04m	£0.00m	£4.13m	£17.62m	£0.00m	-£1.24m	£20.42m	£0.00m
Areas	TOURIST EXPENDITURE Constant through study period			LEAKAGE OF EXPENDITURE Constant through study period			NET TOURIST EXPENDITURE Constant through study period		
	Convenience	Gen Comparison	Bulky Goods	Convenience	Gen Comparison	Bulky Goods	Convenience	Gen Comparison	Bulky Goods
Highland									
Coastal									
Commuter									
City									
Zones 1-5	£0.85m	£4.36m	£0.00m	£0.24m	£1.05m	£0.00m	£0.61m	£3.30m	£0.00m
Zones 6-12	£0.52m	£5.09m	£0.00m	£0.76m	£3.29m	£0.00m	-£0.25m	£1.79m	£0.00m
Zones 13-22, 31	£0.38m	£6.54m	£0.00m	£1.28m	£5.33m	£0.00m	-£0.90m	£1.21m	£0.00m
Zones 23-30, 32	£1.13m	£22.05m	£0.00m	£1.84m	£7.94m	£0.00m	-£0.71m	£14.11m	£0.00m

TABLE 5: TOTAL AVAILABLE EXPENDITURE
2011 Prices

Zone	Total Available Expenditure														
	Convenience Goods					General Comparison Goods					Bulky Goods				
	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027
1+3	£17.2m	£17.4m	£17.8m	£18.8m	£19.9m	£20.5m	£21.2m	£23.9m	£28.7m	£34.5m	£3.9m	£4.1m	£4.7m	£5.7m	£7.0m
2	£12.5m	£12.6m	£12.1m	£12.2m	£12.7m	£14.1m	£14.7m	£15.6m	£18.0m	£21.6m	£2.9m	£3.0m	£3.2m	£3.7m	£4.5m
4+5	£29.5m	£29.8m	£31.0m	£31.1m	£32.4m	£32.7m	£34.1m	£39.3m	£45.2m	£54.4m	£6.9m	£7.2m	£8.3m	£9.6m	£11.6m
6	£15.5m	£15.7m	£15.9m	£17.3m	£18.3m	£16.5m	£17.2m	£19.4m	£24.2m	£29.7m	£3.5m	£3.7m	£4.1m	£5.2m	£6.4m
7	£30.6m	£30.9m	£30.7m	£31.8m	£33.4m	£33.3m	£34.6m	£38.2m	£45.3m	£54.8m	£6.9m	£7.2m	£8.0m	£9.5m	£11.6m
8	£7.4m	£7.4m	£7.1m	£7.1m	£7.4m	£7.8m	£8.1m	£8.6m	£9.9m	£11.9m	£1.7m	£1.7m	£1.8m	£2.1m	£2.6m
9	£10.1m	£10.2m	£9.6m	£9.6m	£10.0m	£10.7m	£11.2m	£11.7m	£13.5m	£16.2m	£2.3m	£2.4m	£2.5m	£2.9m	£3.5m
10	£47.6m	£48.1m	£50.0m	£52.2m	£55.0m	£50.8m	£52.8m	£61.1m	£73.4m	£89.3m	£10.8m	£11.3m	£13.0m	£15.7m	£19.1m
11	£50.0m	£50.5m	£52.5m	£55.2m	£58.2m	£53.5m	£55.7m	£64.2m	£77.8m	£94.8m	£11.4m	£11.8m	£13.7m	£16.6m	£20.3m
12	£17.4m	£17.5m	£20.3m	£22.8m	£24.3m	£18.6m	£19.3m	£24.8m	£32.0m	£39.5m	£3.9m	£4.1m	£5.3m	£6.8m	£8.5m
13	£34.8m	£35.2m	£37.2m	£38.1m	£39.9m	£40.0m	£41.7m	£49.0m	£57.7m	£70.0m	£8.3m	£8.7m	£10.2m	£12.0m	£14.6m
14	£18.2m	£18.4m	£18.5m	£21.5m	£23.0m	£20.9m	£21.8m	£24.4m	£32.5m	£40.3m	£4.3m	£4.5m	£5.1m	£6.8m	£8.4m
15	£39.6m	£40.0m	£42.6m	£43.8m	£46.0m	£45.4m	£47.3m	£55.9m	£66.3m	£80.4m	£9.4m	£9.8m	£11.6m	£13.8m	£16.8m
16	£37.1m	£37.5m	£39.2m	£40.8m	£42.9m	£42.9m	£44.6m	£51.8m	£62.1m	£75.5m	£8.9m	£9.2m	£10.7m	£12.8m	£15.7m
17	£15.1m	£15.3m	£14.6m	£14.5m	£15.2m	£17.4m	£18.1m	£19.3m	£22.1m	£26.6m	£3.6m	£3.8m	£4.0m	£4.6m	£5.5m
18	£28.4m	£28.7m	£27.7m	£27.9m	£29.1m	£32.5m	£33.9m	£36.3m	£42.2m	£51.0m	£6.8m	£7.1m	£7.6m	£8.8m	£10.7m
19	£33.9m	£34.2m	£34.6m	£36.4m	£38.2m	£39.0m	£40.6m	£45.6m	£55.3m	£67.1m	£8.4m	£8.7m	£9.4m	£11.5m	£14.0m
20E	£8.2m	£8.2m	£17.6m	£25.0m	£27.7m	£9.4m	£9.8m	£23.1m	£37.9m	£48.5m	£1.9m	£2.0m	£4.8m	£7.9m	£10.1m
20W	£10.4m	£10.5m	£9.9m	£9.9m	£10.3m	£12.0m	£12.5m	£13.1m	£15.0m	£18.1m	£2.5m	£2.6m	£2.7m	£3.1m	£3.8m
21	£21.7m	£21.9m	£21.8m	£22.2m	£23.3m	£25.1m	£26.1m	£29.0m	£33.9m	£41.1m	£5.2m	£5.4m	£6.0m	£7.0m	£8.5m
22	£27.9m	£28.1m	£31.4m	£34.1m	£36.2m	£32.2m	£33.5m	£41.5m	£51.8m	£63.5m	£6.6m	£6.9m	£8.6m	£10.7m	£13.2m
23	£11.5m	£11.5m	£13.0m	£13.3m	£13.8m	£13.2m	£13.7m	£16.9m	£19.8m	£23.6m	£2.7m	£2.8m	£3.5m	£4.1m	£4.9m
24N	£13.5m	£13.6m	£12.8m	£13.1m	£13.5m	£16.4m	£17.0m	£17.6m	£20.4m	£24.1m	£3.2m	£3.3m	£3.4m	£4.0m	£4.8m
S4S	£16.3m	£16.4m	£28.1m	£32.6m	£36.6m	£19.3m	£20.0m	£36.6m	£48.4m	£62.3m	£3.8m	£3.9m	£7.5m	£10.0m	£13.1m
25	£36.4m	£36.7m	£46.1m	£54.0m	£63.5m	£40.1m	£41.6m	£58.0m	£77.9m	£105.9m	£8.5m	£8.8m	£12.3m	£16.6m	£22.7m
26	£76.2m	£76.8m	£73.0m	£74.7m	£77.5m	£84.5m	£87.7m	£92.6m	£109.0m	£130.4m	£17.8m	£18.5m	£19.5m	£23.1m	£27.8m
27	£37.5m	£37.8m	£35.3m	£36.2m	£37.5m	£41.8m	£43.4m	£45.0m	£52.9m	£63.3m	£8.7m	£9.1m	£9.4m	£11.1m	£13.4m
28	£59.8m	£60.2m	£58.9m	£61.4m	£65.0m	£65.7m	£68.2m	£74.1m	£88.9m	£108.7m	£14.0m	£14.5m	£15.8m	£18.9m	£23.3m
29N	£50.7m	£51.1m	£58.4m	£64.7m	£67.7m	£56.3m	£58.4m	£76.6m	£94.1m	£113.6m	£11.9m	£12.3m	£16.2m	£20.0m	£24.3m
29S	£47.2m	£47.6m	£44.9m	£46.0m	£47.7m	£52.5m	£54.5m	£57.1m	£67.2m	£80.4m	£11.0m	£11.5m	£12.0m	£14.2m	£17.1m
30	£74.9m	£75.5m	£70.5m	£72.2m	£74.9m	£84.9m	£88.0m	£91.3m	£107.2m	£127.9m	£17.5m	£18.2m	£18.9m	£22.3m	£26.9m
31	£21.2m	£21.4m	£20.2m	£20.1m	£21.0m	£24.7m	£25.7m	£26.9m	£30.8m	£37.1m	£5.0m	£5.2m	£5.5m	£6.3m	£7.6m
32	£33.2m	£33.5m	£35.9m	£38.1m	£39.7m	£37.4m	£38.8m	£46.1m	£56.0m	£67.3m	£7.8m	£8.1m	£9.6m	£11.7m	£14.2m

Areas	Total Available Expenditure														
	Convenience Goods					General Comparison Goods					Bulky Goods				
	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027	2011	2013	2017	2022	2027
Highland															
Coastal															
Commuter															
City															
All Zones	£991.4m	£1,000.2m	£1,041.4m	£1,098.7m	£1,161.7m	£1,112.2m	£1,155.8m	£1,334.7m	£1,617.4m	£1,973.3m	£231.8m	£241.0m	£279.0m	£339.0m	£416.3m

ABERDEEN CITY AND ABERDEENSHIRE STRATEGIC RETAIL MODEL

VERSION 2.0 - 2013

TABLE 6A: CONVENIENCE EXPENDITURE FLOWS 2013
FLOWS FROM ORIGIN ZONES

Zone	Total	Highland	Coastal	Commuter	City	Leakage	Totals
Available Expenditure	Aberdeen 1+3 Aberdeen Town 2 Saltwell 1+3 Hurry 4+5 Inch 4+5 Local Rural	Barr 7 Fraserburgh 10 Modall TC 7 Mintlaw 12 Pitlochry 11 Turff 6 Local Rural	Stonewall 21 Westhill 18 Local Rural	City Centre (DC 27 & 30) Barnhill DC & RP 27 Suburban RP 20 Coles DC 2&3 Clare DC 19 Basswood DC 25 Dyce DC 2&N Gartnavel RP 2&5 Kilwinny RP 26 Langharmack Tinto 2&N Mearns DC 2&8 Middion Park DC 25 Rosemount TC 27 Torry TC 30 Local Urban	Monry Dundee & Angus Other Highland/Aberdeenshire Coastal Commuter City Leakage Total		
1+3	E17.4m	25%	13%	18%	15%	2%	53%
2	E12.6m						52%
4+5	E23.8m	25%	65%	10%	5%		40%
6	E15.2m						5%
7	E3.0m						10%
8	E7.4m						5%
9	E10.2m						5%
10	E48.1m						85%
11	E50.5m						1%
12	E17.5m						15%
Coastal	E180.3m						85%
13	E35.2m						1%
14	E18.4m						1%
15	E40.0m						27%
16	E37.5m						43%
17	E15.3m						96%
18	E28.7m						2%
19	E34.2m						20%
20W	E10.5m						8%
21	E21.3m						2%
22	E28.1m						10%
23	E21.4m						16%
Commuter	E299.4m						45%
24	E11.5m						4%
24S	E16.4m						10%
25	E36.7m						6%
26	E76.8m						3%
27	E37.8m						2%
28	E60.2m						2%
29W	E51.1m						5%
29S	E47.6m						5%
30	E75.5m						12%
31	E33.5m						2%
City	E460.6m						5%
Total	E1,005.2m						2%

TABLE 6B: CONVENIENCE EXPENDITURE FLOWS 2013
EXPENDITURE FLOWS

Zone	Total	Highland	Coastal	Commuter	City	Leakage	Totals
Available Expenditure	Aberdeen 1+3 Aberdeen Town 2 Saltwell 1+3 Hurry 4+5 Inch 4+5 Local Rural	Barr 7 Fraserburgh 10 Modall TC 7 Mintlaw 12 Pitlochry 11 Turff 6 Local Rural	Stonewall 21 Westhill 18 Local Rural	City Centre (DC 27 & 30) Barnhill DC & RP 27 Suburban RP 20 Coles DC 2&3 Clare DC 19 Basswood DC 25 Dyce DC 2&N Gartnavel RP 2&5 Kilwinny RP 26 Langharmack Tinto 2&N Mearns DC 2&8 Middion Park DC 25 Rosemount TC 27 Torry TC 30 Local Urban	Monry Dundee & Angus Other Highland/Aberdeenshire Coastal Commuter City Leakage Total		
1+3	E17.4m	E4.3m	E2.3m	E3.0m	E2.6m	E0.0m	E0.0m
2	E12.6m	E0.0m	E0.0m	E2.3m	E0.0m	E1.3m	E0.0m
4+5	E23.8m	E0.0m	E0.0m	E19.4m	E3.0m	E1.1m	E0.0m
6	E15.2m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
7	E3.0m	E0.0m	E0.0m	E3.1m	E0.0m	E0.0m	E0.0m
8	E7.4m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
9	E10.2m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
10	E48.1m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
11	E50.5m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
12	E17.5m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
Coastal	E180.3m	E0.0m	E0.0m	E18.1m	E47.0m	E2.2m	E0.0m
13	E35.2m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
14	E18.4m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
15	E40.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
16	E37.5m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
17	E15.3m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
18	E28.7m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
19	E34.2m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
20W	E10.5m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
21	E21.3m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
22	E28.1m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
23	E21.4m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
Commuter	E299.4m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
24	E11.5m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
24S	E16.4m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
25	E36.7m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
26	E76.8m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
27	E37.8m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
28	E60.2m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
29W	E51.1m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
29S	E47.6m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
30	E75.5m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
31	E33.5m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m	E0.0m
City	E460.6m	E4.3m	E2.3m	E29.6m	E3.0m	E5.4m	E0.0m
Total	E1,005.2m	E4.7m	E3.3m	E29.6m	E3.0m	E5.4m	E0.0m

TABLE 6C: CONVENIENCE EXPENDITURE FLOWS 2013 TRADE DRAW TO TOWNSCENTRES

Zone	Highland						Coastal						Commuter										City																									
	Aboyne 1-3	Afod Town 2	Salween 1-3	Harty 4-5	Inch 4-5	Local Rural	Barr 7	Fraserburgh 10	Macduff TC 7	Minfrevil 12	Pitlochry 11	Turriff 16	Local Rural	Banchory 19	Elton 13	Inverlornie 22	Inverurie 15	Kemnay 16	Knives 15	Larbert 22	Oban 15	Pitlochry 31	Stonehaven 21	Wenthill 18	Local Rural	City Centre (DC 27 & 30)	Barny DC & Rep 27	Suburbs Rep 29	Culter DC 28	Culter DC 19	Banrose DC 25	Dyce DC 24N	Garmockley Rep 24S	Kilwinnie Rep 26	Langmark Tarmac 28N	Muir DC 28	Middon Dale DC 25	Rosemount TC 27	Torry TC 30	Local Urban	Other							
1+3	93%	0%	100%	0%	0%	49%	0%	0%	0%	0%	0%	0%	0%	16%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
2	0%	73%	0%	7%	0%	24%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		
4+5	0%	0%	0%	63%	100%	28%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Highland	93%	73%	100%	71%	100%	100%	0%	0%	0%	0%	0%	0%	0%	17%	0%	0%	6%	0%	0%	0%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
7	0%	0%	0%	13%	0%	0%	89%	3%	100%	0%	0%	14%	10%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
8	0%	0%	0%	1%	0%	0%	2%	3%	0%	0%	1%	11%	13%	0%	2%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
9	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	14%	11%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
10	0%	0%	0%	0%	0%	0%	0%	87%	0%	0%	8%	0%	27%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%				
11	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	74%	0%	11%	0%	10%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
12	0%	0%	0%	0%	0%	0%	0%	6%	0%	100%	16%	0%	20%	0%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
Coastal	0%	0%	0%	20%	0%	0%	95%	100%	100%	100%	99%	100%	100%	0%	20%	0%	14%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		
13	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%				
14	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	13%	0%	0%	0%	0%	0%	0%	0%	0%	0%	11%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
15	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	23%	0%	100%	0%	100%	0%	100%	0%	3%	5%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
16	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	48%	100%	0%	0%	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
17	7%	16%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	17%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
18	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	45%	8%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
19	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	52%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	4%	1%	0%	0%	15%	100%	0%	0%	8%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
20E	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	11%	4%	0%	10%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
20W	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	11%	0%	0%	0%	0%	0%	0%	0%	0%	9%	0%	0%	5%	1%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
21	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	24%	73%	0%	12%	1%	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
22	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	8%	13%	0%	7%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
23	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%				
24E	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
24S	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
25	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
26	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
27	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
28	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
28W	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
28S	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
30	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
32	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
City	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	2%	0%	0%	0%	0%	0%	0%	19%	0%	35%	0%	90%	100%	92%	85%	0%	83%	84%	77%	95%	100%	91%	100%	100%	100%	99%	0%	0%	0%	0%	0%	
External inflows of expenditure from	0%	7%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			
Moay	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		
Angus and Dundee	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		
Highland	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		
Grand Total	£4.7m	£4.2m	£2.3m	£3.0m	£3.4m	£19.1m	£19.1m	£47.0m	£2.2m	£3.9m	£95.8m	£11.5m	£9.9m	£27.7m	£38.7m	£2.8m	£7.6m	£3.7m	£3.8m	£4.5m	£1.2m	£24.8m	£10.6m	£51.2m	£17.0m	£93.4m	£42.7m	£43.7m	£2.2m	£1.7m	£53.4m	£33.3m	£11.1m	£38.1m	£3.3m	£25.4m	£5.1m	£3.4m	£54.3m	£9.9m	£0.0m	£0.0m	£0.0m	£0.0m				
Total/Percent	100%	100%	100%	100%	100%	100%	100%	100																																								

ABERDEEN CITY AND ABERDEENSHIRE STRATEGIC RETAIL MODEL

VERSION 2.0 - 2013

TABLE 11A: BULKY GOODS EXPENDITURE FLOWS 2017 FLOWS FROM ORIGIN ZONES

Zone	Total	Highland	Coastal	Commuter	City	Leakage	Totals
Available Expenditure	Zone 1-3	Zone 4-5	Zone 6-11	Zone 12-21	Zone 22-31	Zone 32-34	Zone 35-40
Available Expenditure	Zone 1-3	Zone 4-5	Zone 6-11	Zone 12-21	Zone 22-31	Zone 32-34	Zone 35-40
1-3	£4.7m	11%	3%	13%	17%	5%	20%
2	£3.2m	16%	1%	1%	2%	2%	2%
4-5	£8.3m	9%	20%	3%	13%	2%	13%
Highland	£16.2m	10%	3%	1%	20%	15%	2%
6	£1.9m	25%	4%	8%	7%	5%	5%
7	£7.9m	7%	6%	8%	10%	10%	17%
8	£2.5m	6%	3%	1%	5%	3%	3%
9	£2.5m	6%	3%	1%	5%	3%	3%
10	£13.6m	0%	0%	0%	0%	0%	0%
11	£13.6m	0%	0%	0%	0%	0%	0%
12	£5.2m	0%	0%	0%	0%	0%	0%
Coastal	£48.5m	0%	0%	0%	0%	0%	0%
13	£10.2m	0%	0%	0%	0%	0%	0%
14	£5.1m	0%	0%	0%	0%	0%	0%
15	£11.6m	0%	0%	0%	0%	0%	0%
16	£10.7m	0%	0%	0%	0%	0%	0%
17	£4.0m	0%	0%	0%	0%	0%	0%
18	£7.6m	0%	0%	0%	0%	0%	0%
19	£9.4m	0%	0%	0%	0%	0%	0%
20E	£4.8m	0%	0%	0%	0%	0%	0%
20W	£2.7m	0%	0%	0%	0%	0%	0%
21	£8.0m	0%	0%	0%	0%	0%	0%
22	£8.6m	0%	0%	0%	0%	0%	0%
23	£5.5m	0%	0%	0%	0%	0%	0%
Commuter	£86.1m	0%	0%	0%	0%	0%	0%
23	£3.5m	0%	0%	0%	0%	0%	0%
24N	£3.4m	0%	0%	0%	0%	0%	0%
24S	£7.5m	0%	0%	0%	0%	0%	0%
25	£12.2m	0%	0%	0%	0%	0%	0%
26	£19.5m	0%	0%	0%	0%	0%	0%
27	£9.4m	0%	0%	0%	0%	0%	0%
28	£15.8m	0%	0%	0%	0%	0%	0%
29N	£16.2m	0%	0%	0%	0%	0%	0%
29S	£12.0m	0%	0%	0%	0%	0%	0%
30	£18.5m	0%	0%	0%	0%	0%	0%
32	£9.6m	0%	0%	0%	0%	0%	0%
City	£128.8m	0%	0%	0%	0%	0%	0%

TABLE 11B: BULKY GOODS EXPENDITURE FLOWS 2017 EXPENDITURE FLOWS

Zone	Total	Highland	Coastal	Commuter	City	Leakage	Totals
Available Expenditure	Zone 1-3	Zone 4-5	Zone 6-11	Zone 12-21	Zone 22-31	Zone 32-34	Zone 35-40
Available Expenditure	Zone 1-3	Zone 4-5	Zone 6-11	Zone 12-21	Zone 22-31	Zone 32-34	Zone 35-40
1-3	£4.7m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
2	£3.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
4-5	£8.3m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
Highland	£16.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
6	£1.9m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
7	£7.9m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
8	£2.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
9	£2.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
10	£13.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
11	£13.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
12	£5.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
Coastal	£48.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
13	£10.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
14	£5.1m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
15	£11.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
16	£10.7m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
17	£4.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
18	£7.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
19	£9.4m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
20E	£4.8m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
20W	£2.7m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
21	£8.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
22	£8.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
23	£5.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
Commuter	£86.1m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
23	£3.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
24N	£3.4m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
24S	£7.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
25	£12.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
26	£19.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
27	£9.4m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
28	£15.8m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
29N	£16.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
29S	£12.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
30	£18.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
32	£9.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
City	£128.8m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
Enslaved	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
use and Murray	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
land and	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
Highland	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m

TABLE 18A: FUTURE FLOORSPACE AND TURNOVER - 2013

All monetary values in 2011 prices

	No.	Convenience				General Comparison				Bulk Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m
CITY CENTRE (ZONES 26, 27 & 30)																	
Convenience																	
<i>Supermarkets</i>																	
Co-op, Union Street	1	1469	882	£6,443	£5,68m	77	46	£5,377	£0,25m					1547	928		£5,93m
Morrisons King Street	1	4647	2417	£12,650	£30,57m	1660	863	£10,557	£9,11m					6838	3452		£40,30m
Co-op, George Street	1	1565	939	£6,443	£6,05m	82	49	£5,377	£0,27m	332	173	£6,601	£1,14m	1647	988		£6,31m
Other Convenience	72	11542	7502	£3,162	£23,72m									11542	7502		£23,72m
Total Convenience	75	19223	11739		£66,02m	1819	959		£9,63m	332	173		£1,14m	21374	12870		£76,79m
Comparison																	
Bon Accord	46	115	75	£3,953	£0,30m	24061	15639	£8,577	£134,14m					24176	15714		£134,44m
St Nicholas	18	116	76	£3,953	£0,30m	6678	4341	£8,577	£37,23m					6678	4341		£37,23m
Union Square	61	116	76	£3,953	£0,30m	28600	18590	£8,577	£159,45m	2270	1476	£5,281	£7,79m	30886	20141		£167,54m
Trinity	22	439	285	£3,953	£1,13m	5357	3482	£7,917	£27,57m					5796	3767		£28,70m
Academy	12	170	111	£3,162	£0,35m	583	379	£5,278	£2,00m					753	489		£2,35m
Galleria	7					112	73	£4,619	£0,34m					112	73		£0,34m
Market		879	704	£1,976	£1,39m	978	704	£3,299	£2,32m					1769	1407		£3,71m
<i>Other Major Units</i>																	
MARKS & SPENCER	1	2580	1677	£8,301	£13,92m	7223	4695	£5,542	£26,02m	516	335	£5,545	£1,86m	10318	6707		£41,80m
PRIMARK	1					11849	7702	£6,017	£46,34m					11849	7702		£46,34m
BRITISH HOME STORES	1					8531	5545	£2,500	£13,86m	449	292	£5,281	£1,54m	8980	5837		£15,41m
JOHN LEWIS PARTNERSHIP	1					12045	7829	£9,237	£72,32m	4015	2610	£5,281	£13,78m	16060	10439		£86,10m
Other Comparison	215					48692	31660	£5,278	£187,06m	13251	8613	£3,961	£36,12m	61044	40264		£201,17m
Total Comparison	385	4299	2927		£17,38m	154610	100628		£888,65m	20501	13326		£59,09m	179411	116881		£765,13m
Total Floorspace (Retail Goods)	460	23522	14665		£83,40m	156429	101587		£998,28m	20833	13499		£60,23m	200785	129751		£841,91m
Retail Services	365				£0,00m				£0,00m				£0,00m				£0,00m
Vacant	66																
ALL RETAIL GOODS AND SERVICES	891				£83,40m				£998,28m				£60,23m				£841,91m
ZONE 1+3 Aboyne Town Centre																	
Convenience																	
Co-op	1	838	503	£7,944	£3,99m	93	56	£4,222	£0,24m					931	559		£4,23m
Other	2	346	225	£2,924	£0,66m									346	225		£0,66m
Total Convenience	3	1184	728		£4,65m	93	56		£0,24m	0	0		£0,00m	1277	784		£4,89m
Comparison	9					1095	712	£3,108	£2,21m	0	0		£0,00m	1095	712		£2,21m
Total Floorspace (Retail Goods)	12	1184	728		£4,65m	1198	768		£2,45m	0	0		£0,00m	2372	1496		£7,10m
Retail Services	13				£0,00m				£0,00m				£0,00m	1233			£0,00m
Vacant	0													0			
ALL RETAIL GOODS AND SERVICES	25				£4,65m				£2,45m				£0,00m	3605			£0,00m
ZONE 1+3 Ballater Town Centre																	
Convenience																	
Co-op	1	310	186	£7,546	£1,40m									310	186		£1,40m
Other	5	475	309	£2,778	£0,86m									475	309		£0,86m
Total Convenience	6	785	495		£2,26m									785	495		£2,26m
Comparison	28					2706	1759	£1,754	£3,06m	86	56	£2,189	£0,12m	2792	1815		£3,21m
Total Floorspace (Retail Goods)	34	785	495		£2,26m	2706	1759		£3,06m	86	56		£0,12m	3577	2310		£5,47m
Retail Services	10				£0,00m				£0,00m				£0,00m	687			£0,00m
Vacant	1													108			
ALL RETAIL GOODS AND SERVICES	45				£2,26m				£3,06m				£0,12m	4372			£0,00m
ZONE 1+3 Remainder																	
Convenience																	
Co-op	9	1094	711	£3,669	£2,61m									1094	711		£2,61m
Other	18					2173	1413	£2,104	£2,97m	0	0			2173	1413		£2,97m
Total Convenience	27	1094	711		£2,61m	2173	1413		£2,97m	0	0		£0,00m	3267	2124		£5,58m
Retail Services	13				£0,00m				£0,00m				£0,00m	1043			£0,00m
Vacant	3													114			
ALL RETAIL GOODS AND SERVICES	43				£2,61m				£2,97m				£0,00m	4424			£0,00m
ZONE 2 Aford Town Centre																	
Convenience																	
Co-op	4	693	451	£3,055	£1,38m									693	451		£1,38m
Other	12					1145	744	£3,213	£2,38m	1349	877	£1,934	£1,70m	2494	1621		£4,09m
Total Convenience	16	693	451		£1,38m	1145	744		£2,38m	1349	877		£1,70m	3188	2072		£5,46m
Comparison	12					1152	744		£2,39m	1351	877		£1,70m	1152	744		£2,39m
Total Floorspace (Retail Goods)	16	693	451		£1,38m	1145	744		£2,38m	1349	877		£1,70m	3188	2072		£5,46m
Retail Services	12				£0,00m				£0,00m				£0,00m	1152			£0,00m
Vacant	2													392			
ALL RETAIL GOODS AND SERVICES	30				£1,38m				£2,38m				£1,70m	4732			£0,00m
ZONE 2 Remainder																	
Convenience																	
Co-op	1	730	438	£8,299	£3,64m									730	438		£3,64m
Other	2	286	186	£2,546	£0,47m									286	186		£0,47m
Total Convenience	3	1017	624		£4,11m	38	23		£0,20m	0	0		£0,00m	1017	624		£4,11m
Comparison	5					794	516	£2,677	£1,38m	0	0		£0,00m	794	516		£1,38m
Total Floorspace (Retail Goods)	8	1017	624		£4,11m	832	539		£1,58m	0	0		£0,00m	1849	1163		£5,69m
Retail Services	4								£0,00m				£0,00m	284			£0,00m
Vacant	4													402			
ALL RETAIL GOODS AND SERVICES	16				£4,11m				£1,58m				£0,00m	2535			£0,00m
ZONE 4+5 Huntly Town Centre																	
Convenience																	
Co-op	10	1871	1216	£1,792	£2,18m									1871	1216		£2,18m
Other	37					3588	2332	£3,019	£7,04m	3453	2244	£1,432	£3,21m	7040	4576		£10,25m
Total Convenience	47	1871	1216		£2,18m	3588	2332		£7,04m	3453	2244		£3,21m	8911	5792		£12,43m
Retail Services	22				£0,00m				£0,00m				£0,00m	2528			£0,00m
Vacant	6								£0,00m				£0,00m	741			
ALL RETAIL GOODS AND SERVICES	75				£2,18m				£7,04m				£3,21m	12180			£0,00m
ZONE 4+5 Inscb Centre																	
Convenience																	
Co-op	4	1378	896	£3,331	£2,98m									1378	896		£2,98m
Other	3					238	155	£2,202	£0,34m	158	102	£2,098	£0,21m	336	257		£0,56m
Total Convenience	7	1378	896		£2,98m	238	1										

TABLE 18A: FUTURE FLOORSPACE AND TURNOVER - 2013

All monetary values in 2011 prices

	No.	Convenience				General Comparison				Bulk Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m
ZONE 7 Macduff TC																	
Convenience	6	1011	657	£3,289	£2.16m												
Comparison	19					2228	1448	£2,024	£2.93m	584	380	£1,612	£0.61m	1011	657		£2.16m
Total Floorspace (Retail Goods)	25	1011	657			2228	1448			584	380		1011	657			£3.54m
Retail Services	15												3823	2485			£5.70m
Vacant	0												1310	0			
ALL RETAIL GOODS AND SERVICES	40				£2.16m				£2.93m				5133				
ZONE 7 Remainder																	
Other Convenience	17	3595	2336	£2,002	£4.68m								3595	2336			£4.68m
Total Convenience	17	3595	2336		£4.68m								3595	2336			£4.68m
Comparison	9					967	628	£2,115	£1.33m				967	628			£1.33m
Total Floorspace (Retail Goods)	26	3595	2336		£4.68m	967	628		£1.33m	0	0		4561	10509			£6.01m
Retail Services	14												1952	363			
Vacant	5												6886				
ALL RETAIL GOODS AND SERVICES	45				£4.68m				£1.33m				6886				
ZONE 8																	
Convenience	5	1340	871	£1,368	£1.19m								1340	871			£1.19m
Comparison	3					356	232	£2,110	£0.49m	590	383	£821	£0.31m	946	615		£0.80m
Total Floorspace (Retail Goods)	8	1340	871		£1.19m	356	232		£0.49m	590	383		1340	871			£1.99m
Retail Services	5												2286	1486			
Vacant	14												299	160			
ALL RETAIL GOODS AND SERVICES	18				£1.19m				£0.49m				2744				
ZONE 9																	
Convenience	4	754	490	£2,083	£1.02m								754	490			£1.02m
Comparison	2					100	65	£3,439	£0.22m	0	0		100	65			£0.22m
Total Floorspace (Retail Goods)	6	754	490		£1.02m	100	65		£0.22m	0	0		754	490			£1.24m
Retail Services	6												853	555			
Vacant	4												761	262			
ALL RETAIL GOODS AND SERVICES	16				£1.02m				£0.22m				1877				
ZONE 10 Frasersburgh Town Centre																	
Convenience	19	3314	2154	£3,135	£6.75m								3314	2154			£6.75m
Comparison	57					9103	5917	£3,597	£21.28m	3661	2379	£2,088	£4.97m	12764	8207		£26.25m
Total Floorspace (Retail Goods)	76	3314	2154		£6.75m	9103	5917		£21.28m	3661	2379		16078	10451			£33.00m
Retail Services	64												7535	1520			
Vacant	23												15447	10206			
ALL RETAIL GOODS AND SERVICES	163				£47.03m				£32.20m				25432				
ZONE 10 Remainder																	
Convenience	1	3922	2549	£12,539	£31.96m	1810	1176	£7,193	£8.46m	302	196	£4,873	£0.96m	6033	3922		£41.38m
ASDA	1	1402	1052	£3,583	£3.77m	247	186	£4,110	£0.76m					1650	1286		£4.53m
Lidl	23	4779	3106	£2,239	£6.95m									4779	3106		£6.95m
Other Convenience	25	10102	6707	£42,69m		2057	1362		£9.23m	302	196		£0.96m	12462	8265		£52.87m
Total Convenience	11				£42.69m	2986	1941		£6.96m	0	0		£0.00m	2986	1941		£6.96m
Comparison	36	10102	6707		£42.69m	5043	3303	£3,597	£16.21m	302	196		£0.96m	15447	10206		£59.85m
Total Floorspace (Retail Goods)	38												15447	10206			
Retail Services	14												2515	3807			
Vacant	88												3807	21769			
ALL RETAIL GOODS AND SERVICES	88				£2.40m				£5.28m				6033	3922			£36.12m
ZONE 11 Peterhead TC																	
Convenience	14	3492	2270	£3,984	£9.04m								3492	2270			£9.04m
Comparison	69					11310	7351	£3,180	£23.38m	3183	2069	£1,787	£3.70m	14493	9420		£27.08m
Total Floorspace (Retail Goods)	83	3492	2270		£9.04m	11310	7351		£23.38m	3183	2069		17985	11690			£36.12m
Retail Services	60												8331	5733			
Vacant	15												1573	27889			
ALL RETAIL GOODS AND SERVICES	158				£60.83m				£36.58m				17985	11690			
ZONE 11 Remainder																	
Convenience	1	4136	2275	£12,394	£28.19m	1103	607	£6,360	£3.86m	276	152	£2,383	£0.36m	5514	3033		£32.41m
Morrisons	1	2690	1479	£12,394	£18.34m	717	395	£6,360	£2.51m	179	99	£4,171	£0.41m	3586	1973		£21.26m
ASDA	1	1343	1008	£3,364	£3.39m	237	178	£3,453	£0.81m					1580	1185		£4.00m
Lidl	22	2001	1301	£2,213	£2.88m									2001	1301		£2.88m
Other Convenience	25	10170	6062	£52,73m		2057	1179		£8.98m	455	250		£0.77m	12682	7491		£60.55m
Total Convenience	1				£28.19m	1103	607		£3.86m	276	152		£0.36m	5514	3033		£32.41m
Comparison	1					2482	1985	£4,906	£9.74m	4223	3378	£1,013	£3.42m	4223	3378		£3.42m
B&Q	1					1129	903	£2,271	£2.05m	764	611	£1,430	£0.87m	2482	1985		£9.74m
Home Bargains	1									2939	1911	£1,489	£2.85m	764	611		£3.87m
Halldens	13													4068	2814		£4.90m
Other Comparison	13																
Total Comparison	16					3611	2889		£11.79m	7926	5900		£7.14m	11537	8789		£18.93m
Comparison	57	10170	6062		£52.79m	5668	4067		£18.77m	8381	6150		£7.14m	24219	16280		£79.48m
Total Floorspace (Retail Goods)	23												1833	947			
Retail Services	6												1833	947			
Vacant	86												27049				
ALL RETAIL GOODS AND SERVICES	86				£1.01m				£5.57m				27049				
ZONE 12 Mintlaw																	
Convenience	4	650	422	£2,077	£0.88m								650	422			£0.88m
Comparison	2					160	104	£3,720	£0.39m	191	124	£3,253	£0.40m	351	228		£0.79m
Total Floorspace (Retail Goods)	6	650	422		£0.88m	160	104		£0.39m	191	124		650	422			£1.67m
Retail Services	7												699	651			
Vacant	2												124				
ALL RETAIL GOODS AND SERVICES	15				£0.88m				£0.39m				1824				
ZONE 12 Remainder																	
Convenience	12	2213	1438	£1,220	£1.75m								2213	1438			£1.75m
Comparison	1					0	0	#DIV/0!	£0.00m	1479	961	£769	£0.74m	1479	961		£0.74m
Total Floorspace (Retail Goods)	13	2213	1438		£1.75m	0	0		£0.00m	1479	961		2213	1438			£2.49m
Retail Services	9												3692	2400			
Vacant	2												966	177			
ALL RETAIL GOODS AND SERVICES	24				£1.75m				£0.00m				4835				
ZONE 13 Elton TC																	
Convenience	7	1840	1196	£3,992	£4.77m								1840	1196			£4.77m
Other Convenience	7	1840	1196		£4.77m								1840	1196			£4.77m
Total Convenience	31					2876	1869	£2,932	£5.48m	1778	1156	£1,623	£1.88m	4654	3025		£7.36m
Comparison	45	1840	1196		£4.77m	2876	1869		£5.48m	1778	1156		£1.88m	6493	4221		£12.13m
Total Floorspace (Retail Goods)	36												4049	2194			
Retail Services	2												2194				
Vacant	83																

TABLE 18A: FUTURE FLOORSPACE AND TURNOVER - 2013

All monetary values in 2011 prices

	No.	Convenience				General Comparison				Bulk Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m
ZONE 15 Oldmeldrum TC																	
Convenience	3	473	307	£3,908	£1.20m												
Comparison	6					321	209	£3,398	£0.71m	793	516	£1,887	£0.97m	473	307		£1.20m
Total Floorspace (Retail Goods)	9	473	307	£1.20m		321	209	£0.71m		793	516	£0.97m	1114	724	1031		£1.68m
Retail Services	11			£0.00m				£0.00m				£0.00m	1587	679	65		£2.68m
Vacant	2												65				
ALL RETAIL GOODS AND SERVICES	22				£1.20m			£0.71m				£0.97m	2331				
ZONE 15 Remainder																	
Convenience	5	1259	818	£1,956	£1.60m								1259	818			£1.60m
Comparison	3					154	100	£2,369	£0.24m	596	388	£1,523	£0.59m	750	487		£0.83m
Total Floorspace (Retail Goods)	8	1259	818	£1.60m		154	100	£0.24m		596	388	£0.59m	2009	1306			£2.43m
Retail Services	5			£0.00m				£0.00m				£0.00m	259	153			£0.43m
Vacant	2												153				
ALL RETAIL GOODS AND SERVICES	15				£1.60m			£0.24m				£0.59m	2421				
ZONE 16 Inverurie TC																	
Convenience	1	4733	3076	£13,802	£42.46m	2564	1666	£7,640	£12.73m	592	385	£4,817	£1.85m	7888	5127		£57.04m
Comparison	12	2601	1691	£3,944	£6.67m	2564	1666	£7,640	£12.73m	592	385	£1,85m	£1.85m	2601	1691		£6.67m
Total Floorspace (Retail Goods)	13	7334	4767	£17,746	£49.13m	5128	3332	£15,280	£25.46m	1184	770	£6,667	£3.70m	10489	6818		£63.71m
Retail Services	52					10383	6749	£3,820	£25.78m	3818	2481	£2,064	£5.12m	14201	9231		£30.90m
Vacant	9					3917	2538	£5,457	£16.03m	3912	2259	£1,720	£3.89m	8726	6545		£26.90m
Comparison	52	1798	1348	£4,437	£5.98m	10383	6749	£3,820	£25.78m	3818	2481	£2,064	£5.12m	14201	9231		£30.90m
Total Floorspace (Retail Goods)	74	9132	6115	£22,183	£55.11m	16864	11353	£10,457	£41.51m	7421	5125	£10,866	£10.86m	33416	22593		£120.52m
Retail Services	50				£0.00m			£0.00m				£0.00m	6626	0			£0.00m
Vacant	5												0				
ALL RETAIL GOODS AND SERVICES	129				£77.56m			£56.18m				£16.72m	40042				
ZONE 16 Kemnay TC																	
Convenience	4	681	443	£1,693	£0.75m								681	443			£0.75m
Comparison	4					409	266	£2,520	£0.67m	0	0	£0.00m	409	266			£0.67m
Total Floorspace (Retail Goods)	8	681	443	£0.75m		409	266	£0.67m		0	0	£0.00m	1090	709			£1.42m
Retail Services	8			£0.00m				£0.00m				£0.00m	678	0			£0.67m
Vacant	0												0				
ALL RETAIL GOODS AND SERVICES	16				£0.75m			£0.67m				£0.00m	1768				
ZONE 16 Remainder																	
Convenience	1	3122	1523	£13,802	£22.41m	347	180	£7,640	£1.38m				3469	1804			£23.79m
Comparison	4	531	318	£2,465	£0.79m								531	318			£0.79m
Total Floorspace (Retail Goods)	5	3653	1942	£16,267	£23.19m	347	180	£7,640	£1.38m				3999	2122			£24.57m
Retail Services	7					291	174	£2,729	£0.48m	6388	3833	£1,720	£6.59m	6679	4007		£7.07m
Vacant	0												0				
Comparison	12	0	0	£0.00m		291	174	£0.48m		6388	3833	£6.59m	6679	4007			£7.07m
Total Floorspace (Retail Goods)	10	3653	1942	£23.19m		637	355	£10.85m		6388	3833	£6.59m	10678	6129			£31.64m
Retail Services	10							£0.00m				£0.00m	1314	0			£0.48m
Vacant	0												0				
ALL RETAIL GOODS AND SERVICES	20				£0.75m			£0.22m				£0.74m	11993				
ZONE 17																	
Convenience	7	1679	1091	£1,398	£1.53m								1679	1091			£1.53m
Comparison	1					45	29	£3,102	£0.09m	0	0	£0.00m	45	29			£0.09m
Total Floorspace (Retail Goods)	8	1679	1091	£1.53m		45	29	£0.09m		0	0	£0.00m	1724	1120			£1.62m
Retail Services	4			£0.00m				£0.00m				£0.00m	368	394			£0.09m
Vacant	3												394				
ALL RETAIL GOODS AND SERVICES	15				£1.53m			£0.09m				£0.00m	2486				
ZONE 18 Westhill Town Centre																	
Convenience	1	1485	891	£8,116	£7.23m	165	99	£7,786	£0.77m				1650	990			£8.00m
Comparison	1	1427	928	£4,119	£3.82m	252	164	£5,254	£0.86m				1679	1091			£4.69m
Total Floorspace (Retail Goods)	2	2912	1819	£12,235	£11.05m	417	263	£13,040	£1.63m	0	0	£0.00m	3329	2081			£12.69m
Retail Services	4	385	233	£3,295	£0.77m	728	473	£3,678	£1.74m	0	0	£0.00m	728	473			£1.74m
Vacant	0												0				
Comparison	9	3300	2051	£11,822		417	263	£3,678	£1.63m	0	0	£0.00m	3717	2314			£13.45m
Total Floorspace (Retail Goods)	13	3300	2051	£11.82m		1145	736	£7,356	£1.74m	0	0	£0.00m	4445	2787			£15.19m
Retail Services	16											£0.00m	1633	0			£0.77m
Vacant	1												0				
ALL RETAIL GOODS AND SERVICES	30				£11.82m			£19.71m				£0.00m	6078				
ZONE 18 Remainder																	
Convenience	3	771	501	£2,060	£1.03m								771	501			£1.03m
Comparison	1	3438	2501	£11,534	£28.85m	1228	697	£7,356	£5.13m	246	375	£4,705	£1.76m	4911	3573		£35.74m
Total Floorspace (Retail Goods)	4	4208	3002	£13,594	£29.88m	1228	697	£7,356	£5.13m	246	375	£4,705	£1.76m	5682	4074		£36.77m
Retail Services	1					142	92	£2,627	£0.24m	0	0	£0.00m	142	92			£0.24m
Vacant	0												0				
Comparison	1	3938	2560	£4,284	£10.97m	3375	2194	£5,465	£11.99m	3375	2194	£3,495	£7.67m	11251	6948		£30.62m
Total Floorspace (Retail Goods)	2	3938	2560	£4,284	£10.97m	3517	2286	£5,465	£12.23m	3375	2194	£3,495	£7.67m	10830	7040		£30.67m
Retail Services	6	8146	5562	£16,267	£40.94m	4745	2983	£11,353	£23.36m	3621	2569	£9,438	£15.12m	15512	11114		£67.63m
Vacant	1												809	217			£0.48m
ALL RETAIL GOODS AND SERVICES	9				£1.43m			£1.02m				£0.07m	17538				
ZONE 19 Banchoy TC																	
Convenience	7	1339	870	£3,063	£2.67m								1339	870			£2.67m
Comparison	34					3027	1968	£3,604	£7.09m	1481	963	£2,873	£2.77m	4508	2930		£9.86m
Total Floorspace (Retail Goods)	41	1339	870	£2.67m		3027	1968	£3,604	£7.09m	1481	963	£2,77m	5847	3800			£12.52m
Retail Services	28			£0.00m				£0.00m				£0.00m	2552	179			£0.00m
Vacant	2												179				
ALL RETAIL GOODS AND SERVICES	71				£37.68m			£11.69m				£4.43m	8578				
ZONE 19 Remainder Aberdeenshire																	
Convenience	1	3104	2018	£12,254	£24.72m	828	538	£8,410	£4.52m	207	135	£6,704	£0.90m	4139	2690		£30.15m
Comparison	1	2477	1486	£7,133	£10.60m	275	165	£4,896	£0.81m				2752	1691			£11.41m
Total Floorspace (Retail Goods)	2	5581	3504	£19,387	£35.32m	1103	703	£13,306	£5.33m	207	135	£6,704	£0.90m	6891	4381		£41.56m
Retail Services	6	5847	3677	£16,267	£35.70m	666	433	£3,004	£1.30m	763	496	£2,394	£1.19m	1429	929		£2.49m
Vacant	0												0				
Comparison	10	5847	3677	£16,267	£35.70m	1769	1136	£11,353	£6.63m	970	630	£2,09m	£2.09m	8585	5443		£44.42m

TABLE 18A: FUTURE FLOORSPACE AND TURNOVER - 2013

All monetary values in 2011 prices

	No.	Convenience				General Comparison				Bulk Goods				All Goods				
		GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	
ZONE 21 Remainder																		
Convenience	Cc-op	1	1417	850	£7,480	£6.36m	157	94	£3,914	£0.37m								
	Other Convenience	3	302	196	£2,295	£0.45m												
	Total Convenience	4	1719	1046	£9,775	£6.81m	157	94	£3,914	£0.37m	0	0	£2,146	£0.12m	1574	945	£6.73m	
Comparison		3					157	94	£2,401	£0.56m	87	57	£0.12m	£0.12m	1676	1141	£7.16m	
Total Floorspace (Retail Goods)		7	1719	1046	£6.81m	£6.81m	356	329	£2,401	£0.93m	87	57	£0.12m	£0.12m	2162	1432	£7.86m	
Retail Services		11													921		£0.69m	
Vacant		0													0		£0.00m	
ALL RETAIL GOODS AND SERVICES		18			£1.97m	£1.97m				£0.78m			£0.00m	£0.00m	3083		£8.55m	
ZONE 22 Laurencekirk TC																		
Convenience		5	1399	909	£4,953	£4.50m												
Comparison		12					858	558	£3,003	£1.68m	950	617	£1,365	£0.84m	1399	909	£4.50m	
Total Floorspace (Retail Goods)		17	1399	909	£4.50m	£4.50m	858	558	£3,003	£1.68m	950	617	£1,365	£0.84m	1808	1175	£5.22m	
Retail Services		14													870		£0.62m	
Vacant		2													272		£0.26m	
ALL RETAIL GOODS AND SERVICES		33			£4.50m	£4.50m				£1.68m			£0.84m	£0.84m	4349		£6.10m	
ZONE 22 Inverberrie TC																		
Convenience		6	1510	982	£2,967	£2.81m												
Comparison		5					528	343	£3,545	£1.22m	332	216	£1,525	£0.33m	1510	982	£2.81m	
Total Floorspace (Retail Goods)		11	1510	982	£2.81m	£2.81m	528	343	£3,545	£1.22m	332	216	£1,525	£0.33m	2371	1541	£4.36m	
Retail Services		4													484		£0.46m	
Vacant		1													21		£0.21m	
ALL RETAIL GOODS AND SERVICES		16			£2.81m	£2.81m				£1.22m			£0.33m	£0.33m	2876		£3.24m	
ZONE 22																		
Convenience		7	862	561	£2,008	£1.13m												
Comparison		1					28	18	£3,735	£0.07m	0	0	£0.00m	£0.00m	862	561	£1.13m	
Total Floorspace (Retail Goods)		8	862	561	£1.13m	£1.13m	28	18	£3,735	£0.07m	0	0	£0.00m	£0.00m	890	578	£1.19m	
Retail Services		8													1115		£0.87m	
Vacant		4													329		£0.26m	
ALL RETAIL GOODS AND SERVICES		20			£1.13m	£1.13m			£0.07m	£0.07m			£0.00m	£0.00m	2334		£1.45m	
ZONE 23																		
Convenience		4	326	212	£3,270	£0.69m												
Comparison	RW Units (Denmore)	9					0	0	#DIV/0!	£0.00m	19822	14866	£1,167	£17.35m	326	212	£0.69m	
Total Floorspace (Retail Goods)		13	326	212	£0.69m	£0.69m	0	0	#DIV/0!	£0.00m	19822	14866	£1,167	£17.35m	20148	15078	£18.04m	
Retail Services		4													452		£0.34m	
Vacant		1													1599		£1.21m	
ALL RETAIL GOODS AND SERVICES		18			£0.69m	£0.69m			£0.00m	£0.00m			£17.35m	£17.35m	22199		£19.25m	
ZONE 24N																		
Convenience		1	4687	2578	£12,865	£33.16m												
Comparison	ASDA	1	92	60	£2,757	£0.16m	2982	1640	£6,914	£11.34m	852	469	£5,091	£2.39m	8521	4687	£46.89m	
	Other Convenience	2	4778	2637	£13,622	£33.33m	2982	1640	£6,914	£11.34m	852	469	£5,091	£2.39m	8613	4746	£47.05m	
Total Floorspace (Retail Goods)		5	4778	2637	£33.33m	£33.33m	3786	2162	£13,622	£33.33m	944	528	£10,182	£4.78m	9508	5328	£48.97m	
Retail Services		5													373		£0.28m	
Vacant		2													387		£0.30m	
ALL RETAIL GOODS AND SERVICES		12			£33.33m	£33.33m			£13.15m	£13.15m			£2.39m	£2.39m	10268		£50.85m	
ZONE 24N Remainder																		
Convenience		3	854	555	£2,952	£1.64m												
Comparison	Total Convenience	1					67	43	£3,923	£0.17m	0	0	£0.00m	£0.00m	854	555	£1.64m	
Total Floorspace (Retail Goods)		4	854	555	£1.64m	£1.64m	67	43	£3,923	£0.17m	0	0	£0.00m	£0.00m	920	598	£1.81m	
Retail Services		10													702		£0.54m	
Vacant		4													0		£0.00m	
ALL RETAIL GOODS AND SERVICES		18			£1.64m	£1.64m			£0.17m	£0.17m			£0.00m	£0.00m	1622		£1.81m	
Zone 24S																		
Convenience	Lidl	1	967	725	£2,541	£1.84m												
Comparison	Other Convenience	11	2221	1443	£1,906	£2.75m	171	128	£3,177	£0.41m					1137	853	£2.25m	
Total Floorspace (Retail Goods)		12	3187	2168	£4,447	£4.59m	255	165	£2,382	£0.39m	66	43	£1,833	£0.08m	3219	2505	£4.54m	
Retail Services		15													1306		£1.01m	
Vacant		3													402		£0.31m	
ALL RETAIL GOODS AND SERVICES		46			£4.59m	£4.59m			£0.80m	£0.80m			£0.08m	£0.08m	5387		£5.69m	
ZONE 25 Middleton Park																		
Convenience	ASDA	1	3597	1979	£12,829	£25.38m												
Comparison		0					1285	707	£3,432	£2.43m	257	141	£3,887	£0.55m	5139	2827	£28.36m	
Total Floorspace (Retail Goods)		1	3597	1979	£12,829	£25.38m	1285	707	£3,432	£2.43m	257	141	£3,887	£0.55m	5139	2827	£28.36m	
Retail Services		6													648		£0.49m	
Vacant		0													0		£0.00m	
ALL RETAIL GOODS AND SERVICES		7			£25.38m	£25.38m			£2.43m	£2.43m			£0.55m	£0.55m	5787		£28.85m	
Daneston Zone 25																		
Convenience	Tesco	1	6657	4327	£12,299	£53.22m												
Comparison	Other Conv	1	113	74	£3,075	£0.23m	5326	3462	£5,885	£20.37m	1331	865	£3,495	£3.02m	13315	8655	£76.62m	
Total Floorspace (Retail Goods)		3	6771	4401	£15,374	£53.45m	5368	3489	£9,170	£20.60m	1331	865	£3,495	£3.02m	13470	8756	£76.93m	
Retail Services		5													449		£0.34m	
Vacant		0													0		£0.00m	
ALL RETAIL GOODS AND SERVICES		8			£53.45m	£53.45m			£20.45m	£20.45m			£3.02m	£3.02m	13919		£77.27m	
Other Zone 25																		
Convenience		6	1057	687	£3,203	£2.20m												
Comparison	Total Convenience	2					167	108	£3,840	£0.42m					1057	687	£2.20m	
Total Floorspace (Retail Goods)		8	1057	687	£3.20m	£3.20m	167	108	£3,840	£0.42m	0	0	£0.00m	£0.00m	1223	795	£2.62m	
Retail Services		9													1065		£0.81m	
Vacant		1													94		£0.07m	
ALL RETAIL GOODS AND SERVICES		18			£2.20m	£2.20m			£0.42m	£0.42m			£0.00m	£0.00m	2382		£2.69m	
ZONE 26 Kittybrewster																		
Convenience		0																
Comparison	Major Units	12					3697	2773	£3,599	£9.98m	12374	7114	£2,259	£16.07m	16071	9887	£26.05m	
Total Floorspace (Retail Goods)		12	0	0	£0.00m	£0.00m	3697	2773	£3,599	£9.98m	12374	7114	£2,259	£16.07m	16071	9887	£26.05m	
Retail Services		1													0		£0.00m	
Vacant		1													973		£0.74m	
ALL RETAIL GOODS AND SERVICES		13			£0.00m	£0.00m			£9.98m	£9.98m			£16.07m	£16.07m	17044		£26.79m	
Other Zone 26																		
Convenience	Lidl	1	1053	789	£3,219	£2.54m												
Comparison	Other Convenience	42	4739	3081	£2,414	£7.44m	186	139	£2,685	£0.37m					1238	929	£2.92m	
Total Floorspace (Retail Goods)		43	5792	3870	£5,633	£9.98m	186	139	£2,685	£0.37m					5979	4009	£10.35m	
Retail Services		52					7756	5041	£2,014	£10.15m	4312							

TABLE 18A: FUTURE FLOORSPACE AND TURNOVER - 2013

All monetary values in 2011 prices

	No.	Convenience				General Comparison				Bulk Goods				All Goods			
		GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m
ZONE 27																	
Remainder Zone 27																	
Convenience	25	3310	2151	£1,931	£4.15m												
Comparison	39																
Total Floorspace (Retail Goods)	64	3310	2151		£4.15m	3275	2128	£2,649	£5.64m	4813	3129	£842	£2.63m	3310	2151		£4.15m
Retail Services	40				£0.00m	3275	2128		£5.64m	4813	3129		£2.63m	11997	5257		£8.27m
Vacant	12													2332	1242		£12.43m
ALL RETAIL GOODS AND SERVICES	116				£4.15m				£5.64m				£2.63m	15171			
ZONE 28																	
Mastrick																	
Convenience	7	1154	750	£4,405	£3.30m												
Comparison	4	924	693	£3,646	£2.53m	882	573	£3,570	£2.05m	159	103	£2,816	£0.29m	1154	750		£3.30m
Total Floorspace (Retail Goods)	11	1154	750		£3.30m	882	573		£2.05m	159	103		£0.29m	2194	1426		£5.64m
Retail Services	11				£0.00m				£0.00m				£0.00m	1525	72		
Vacant	1													3791			
ALL RETAIL GOODS AND SERVICES	23				£3.30m				£2.05m				£0.29m				
Zone 28 Remainder																	
Convenience	17	3880	2522	£2,149	£5.42m									3880	2522		£5.42m
Comparison	3					257	167	£4,090	£0.68m	0	0			257	167		£0.68m
Total Floorspace (Retail Goods)	20	3880	2522		£5.42m	257	167		£0.68m	0	0		£0.00m	4136	2689		£6.10m
Retail Services	29				£0.00m				£0.00m				£0.00m	2020	179		
Vacant	2													179			
ALL RETAIL GOODS AND SERVICES	51				£5.42m				£0.68m				£0.00m	6335			
ZONE 29N																	
Convenience	1	3917	2546	£12,761	£32.49m	2285	1485	£5,779	£8.58m	326	212	£4,294	£0.91m	6529	4244		£41.99m
Comparison	1	924	693	£3,646	£2.53m	163	122	£3,302	£0.40m					1088	816		£2.93m
Total Floorspace (Retail Goods)	15	2038	1325	£2,735	£3.62m	2448	1608	£8,999	£8.99m	326	212	£2,576	£0.91m	2038	1325		£3.62m
Retail Services	17	6880	4564		£38.65m	947	616	£2,477	£1.61m	959	624		£1.61m	9655	6384		£48.54m
Vacant	0													1907	1239		£3.13m
ALL RETAIL GOODS AND SERVICES	37	6880	4564		£38.65m	3395	2223		£10.51m	1286	836		£2.52m	11561	7623		£51.68m
ZONE 29S Garthdee																	
Convenience	1	5686	3127	£19,147	£99.89m	6397	3518	£4,148	£14.59m	2132	1173	£3,414	£4.00m	14216	7819		£78.48m
Comparison	1	4478	2687	£19,147	£51.45m	2612	1567	£4,148	£6.50m	373	224	£3,414	£0.76m	7464	4478		£58.71m
Total Floorspace (Retail Goods)	2	10164	5814		£111.33m	9009	5086		£21.10m	2506	1397		£4.77m	21679	12297		£137.19m
Retail Services	3				£0.00m	1607	1205		£4.29m	11606	8104		£14.86m	13213	9910		£19.14m
Vacant	0													0	0		
ALL RETAIL GOODS AND SERVICES	5	10164	5814		£111.33m	10617	6291		£25.38m	14111	10101		£19.63m	34892	22207		£156.34m
ZONE 29S Cutts																	
Convenience	3	756	492	£4,568	£2.25m									756	492		£2.25m
Comparison	11					2175	1414	£2,699	£3.82m	48	31	£3,715	£0.11m	2223	1445		£3.93m
Total Floorspace (Retail Goods)	14	756	492		£2.25m	2175	1414		£3.82m	48	31		£0.11m	2979	1936		£6.18m
Retail Services	15				£0.00m				£0.00m				£0.00m	1406	401		
Vacant	2													401			
ALL RETAIL GOODS AND SERVICES	31				£2.25m				£3.82m				£0.11m	4786			
Remainder Zone 29S																	
Convenience	13	2118	1377	£3,111	£4.28m									2118	1377		£4.28m
Comparison	14					1449	942	£2,895	£2.73m	211	137	£2,504	£0.34m	1660	1079		£3.07m
Total Floorspace (Retail Goods)	27	2118	1377		£4.28m	1449	942		£2.73m	211	137		£0.34m	3778	2456		£7.35m
Retail Services	24				£0.00m				£0.00m				£0.00m	1946	117		
Vacant	3													117			
ALL RETAIL GOODS AND SERVICES	54				£4.28m				£2.73m				£0.34m	5840			
ZONE 30 Torry																	
Convenience	8	1410	916	£3,659	£3.35m									1410	916		£3.35m
Comparison	14					1135	737	£2,984	£2.20m	301	196	£1,858	£0.36m	1436	933		£2.95m
Total Floorspace (Retail Goods)	22	1410	916		£3.35m	1135	737		£2.20m	301	196		£0.36m	2946	1850		£5.92m
Retail Services	32				£0.00m				£0.00m				£0.00m	2325	381		
Vacant	7													381			
ALL RETAIL GOODS AND SERVICES	61				£3.35m				£2.20m				£0.36m	5552			
ZONE 30 Beach Boulevard RP																	
Convenience	1	5019	2761	£13,470	£37.18m	3194	1757	£4,900	£8.61m	913	502	£4,333	£2.17m	9126	5019		£47.97m
Comparison	1	1236	803	£4,811	£3.87m	218	142	£3,500	£0.50m					1454	945		£4.36m
Total Floorspace (Retail Goods)	1	1919	690	£3,848	£2.65m	3412	1898		£9.10m	913	502		£2.17m	11499	6654		£54.98m
Retail Services	8				£43.70m	3913	2355	£3,500	£10.27m	7231	5424	£1,548	£8.39m	11145	8359		£118.97m
Vacant	0					7325	4833		£0.00m	8144	5925		£0.00m	0	0		
ALL RETAIL GOODS AND SERVICES	11	7175	4253		£43.70m	7325	4833		£19.38m	8144	5925		£10.57m	22644	15012		£73.65m
ZONE 30 Remainder																	
Convenience	34	4644	3019	£2,250	£6.79m									4644	3019		£6.79m
Comparison	34					3310	2151	£2,864	£6.16m	2483	1614	£1,578	£2.55m	5793	3765		£8.71m
Total Floorspace (Retail Goods)	68	4644	3019		£6.79m	3310	2151		£6.16m	2483	1614		£2.55m	10437	6784		£15.50m
Retail Services	78				£0.00m				£0.00m				£0.00m	8916	4598		
Vacant	7													4598			
ALL RETAIL GOODS AND SERVICES	153				£6.79m				£6.16m				£2.55m	23951			
ZONE 31 Portlethen																	
Convenience	1	5684	3126	£11,323	£35.40m	2842	1563	£4,303	£6.73m	947	521	£8,436	£4.40m	9473	5210		£46.52m
Comparison	2	493	321	£2,831	£0.91m	2842	1563		£6.73m	947	521		£4.40m	493	321		£0.91m
Total Floorspace (Retail Goods)	3	6177	3447		£36.30m	4759	3570	£3,688	£13.16m	6495	4871	£1,285	£6.26m	11254	8441		£19.43m
Retail Services	4					247	160	£2,213	£0.36m	96	63	£1,928	£0.12m	343	223		£0.48m
Vacant	7					5006	3730		£13.52m	6591	4934		£6.38m	11597	8664		£19.90m
ALL RETAIL GOODS AND SERVICES	24	6177	3447		£36.30m	7848	5293		£20.24m	7838	5455		£10.78m	21563	14194		£67.33m
ZONE 32																	
Convenience	1	2435	1582	£6,719	£10.63m	271	176	£7,206	£1.27m					2705	1758		£11.90m
Comparison	1	935	701	£1,920	£1.35m	165	124	£4,118	£0.51m					1100	825		£1.86m
Total Floorspace (Retail Goods)	7	1504	977	£1,440	£1.41m	436	300	£3,603	£1.78m	63	41	£1,960	£0.08m	5309	3561		£15.16m
Retail Services	7				£13.39m	71	46		£0.17m				£0.08m	134	87		£0.25m
Vacant	3													0	0		
ALL RETAIL GOODS AND SERVICES	16	4873	3261		£13.39m	506	345		£1.94m	63	41		£0.08m	5443			

TABLE 19A: FUTURE FLOORSPACE AND TURNOVER - 2017

All monetary values in 2011 prices

	No.	GFA Sq M	NFA Sq M	Convenience		General Comparison				GFA Sq M	NFA Sq M	Bulk Goods		GFA Sq M	NFA Sq M	All Goods		
				Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m			Turnover Rate £/Sq M	Total Turnover £m			Turnover Rate £/Sq M	Total Turnover £m	
CITY CENTRE (ZONES 26, 27 & 30)																		
Convenience																		
<i>Supermarkets</i>																		
Co-op, Union Street	1	1469	882	£4,870	£4.29m	77	46	£5,930	£0.28m							1547	928	£4.57m
Morrisons King Street	1	4647	2417	£9,561	£23.10m	1660	863	£11,641	£10.05m	332	173	£7,374	£1.27m	6639	3452	£34.42m		
Co-op, George Street	1	1565	939	£4,870	£4.57m	82	49	£5,930	£0.28m					1647	968	£4.86m		
Other Convenience	72	11542	7502	£2,390	£17.93m									11542	7502	£17.93m		
Total Convenience	75	19223	11739	£49.90m	£49.90m	1819	959	£10.62m	£10.62m	332	173	£1.27m	£1.27m	21374	12870	£61.79m		
Comparison																		
Bon Accord	46	115	75	£2,988	£0.22m	24061	15639	£9,458	£147.92m					24176	15714	£148.15m		
St Nicholas	18					6678	4341	£9,458	£41.06m					6678	4341	£41.06m		
Union Square	61	116	76	£2,988	£0.23m	28600	18590	£9,458	£175.83m	2270	1476	£5,899	£8.70m	30986	20141	£184.76m		
Trinity	22	439	285	£2,988	£0.85m	5357	3482	£8,731	£30.40m					5796	3767	£31.25m		
Academy	12	170	111	£2,390	£0.26m	583	379	£5,821	£2.20m					753	489	£26.17m		
Galleria	7					112	73	£5,093	£0.37m					112	73	£0.37m		
Market	7	879	704	£1,494	£1.05m	879	704	£3,638	£2.56m					1759	1407	£3.61m		
Other Major Units																		
MARKS & SPENCER	1	2580	1677	£6,274	£10.52m	7223	4695	£6,112	£28.69m	516	335	£6,194	£2.08m	10318	6707	£41.29m		
PRIMARK	1					11849	7702	£6,635	£51.11m					11849	7702	£51.11m		
BRITISH HOME STORES	1					8062	5253	£2,910	£15.29m					8960	5837	£17.01m		
JOHN LEWIS PARTNERSHIP	1					12045	7829	£10,186	£79.75m	898	584	£2,949	£1.72m	12660	8043	£96.14m		
Other Comparison	215					48692	31650	£5,821	£184.22m	13251	8613	£4,424	£38.11m	61944	40264	£222.33m		
Total Comparison	385	4299	2927	£13.14m	£13.14m	154161	100337	£759.40m	£759.40m	20950	13618	£66.00m	£66.00m	179411	116881	£838.54m		
Total Floorspace (Retail Goods)	460	23522	14665	£4,298	£63.04m	155980	101295	£7,602	£770.02m	21282	13790	£4,879	£67.28m	200785	129751	£6,939	£900.33m	
Retail Services	365				£0.00m				£0.00m					57215				
Vacant	86													13847				
ALL RETAIL GOODS AND SERVICES	891				£63.04m				£770.02m					271947				
ZONE 1+3 Abovne Town Centre																		
Convenience																		
Co-op	1	838	503	£8,113	£4.08m	93	56	£4,593	£0.26m					931	559	£4.34m		
Other	2	346	225	£2,986	£0.67m									346	225	£0.67m		
Total Convenience	3	1184	728			93	56							1277	784	£5.01m		
Comparison	9					1095	712	£3,381	£2.41m	0	0	#DIV/0!	£0.00m	1095	712	£2.41m		
Total Floorspace (Retail Goods)	12	1184	728	£6,528	£4.75m	1198	768	£3,469	£2.66m	0	0	#DIV/0!	£0.00m	2372	1496	£4,958	£7.41m	
Retail Services	13													1233				
Vacant	0													0				
ALL RETAIL GOODS AND SERVICES	25				£4.75m				£2.66m					3605				
ZONE 1+3 Ballater Town Centre																		
Convenience																		
Co-op	1	310	186	£7,740	£1.44m									310	186	£1.44m		
Other	5	475	309	£2,849	£0.88m									475	309	£0.88m		
Total Convenience	6	785	495											785	495			
Comparison	28					2706	1759	£1,922	£3.36m	86	56	£2,498	£0.14m	2792	1815	£3.52m		
Total Floorspace (Retail Goods)	34	785	495	£4,687	£2.32m	2706	1759	£1,922	£3.36m	86	56	£2,498	£0.14m	3576	2310	£2,529	£5.84m	
Retail Services	10													687				
Vacant	1													108				
ALL RETAIL GOODS AND SERVICES	45				£2.32m				£3.36m					4371				
ZONE 1+3 Remainder																		
Convenience																		
Co-op	9	1094	711	£3,763	£2.68m									1094	711	£2.68m		
Comparison	18					2173	1413	£2,370	£3.35m	0	0	#DIV/0!	£0.00m	2173	1413	£3.35m		
Total Floorspace (Retail Goods)	27	1094	711	£3,763	£2.68m	2173	1413	£2,370	£3.35m	0	0	#DIV/0!	£0.00m	3267	2124	£2,837	£6.02m	
Retail Services	13													1043				
Vacant	3													114				
ALL RETAIL GOODS AND SERVICES	43				£2.68m				£3.35m					4424				
ZONE 2 Aiford Town Centre																		
Convenience																		
Total Convenience	4	693	451	£2,938	£1.32m									693	451	£1.32m		
Comparison	12					1145	744	£3,381	£2.52m	1349	877	£2,253	£1.98m	2494	1621	£4.49m		
Total Floorspace (Retail Goods)	16	693	451	£2,938	£1.32m	1145	744	£3,381	£2.52m	1349	877	£2,253	£1.98m	3188	2072	£2,168	£4.49m	
Retail Services	12													1152				
Vacant	2													392				
ALL RETAIL GOODS AND SERVICES	30				£4.06m				£2.47m					4732				
ZONE 2 Remainder																		
Convenience																		
Co-op	1	730	438	£7,983	£3.50m	38	23	£9,186	£0.21m					769	461	£3.35m		
Other	2	286	186	£2,449	£0.46m									286	186	£0.46m		
Total Convenience	3	1017	624			38	23							1055	647			
Comparison	5					794	516	£2,818	£1.45m	0	0	#DIV/0!	£0.00m	794	516	£1.45m		
Total Floorspace (Retail Goods)	8	1017	624	£6,333	£3.95m	832	539	£3,090	£1.67m	0	0	#DIV/0!	£0.00m	1849	1163	£1,249	£1.45m	
Retail Services	4													284				
Vacant	4													402				
ALL RETAIL GOODS AND SERVICES	16				£1.21m				£1.72m					2535				
ZONE 4+5 Huntly Town Centre																		
Convenience																		
Co-op	10	1871	1216	£1,494	£1.82m									1871	1216	£1.82m		
Comparison	37					3588	2332	£3,395	£7.92m	3453	2244	£1,618	£3.63m	7040	4576	£11.55m		
Total Floorspace (Retail Goods)	47	1871	1216	£1,494	£1.82m	3588	2332	£3,395	£7.92m	3453	2244	£1,618	£3.63m	8911	5792	£2,308	£13.37m	
Retail Services	22													2528				
Vacant	6													741				
ALL RETAIL GOODS AND SERVICES	75				£25.16m				£15.36m					12180				
ZONE 4+5 Insch Centre																		
Convenience																		
Co-op	4	1378	896	£3,465	£3.10m									1378	896	£3.10m		
Comparison	3					238	155	£2,540	£0.39m	158	102	£2,426	£0.25m	396	257	£0.64m		
Total Floorspace (Retail Goods)	7	1378	896	£3,465	£3.10m	238	155	£2,540	£0.39m	158	102	£2,426	£0.25m	1773	1153	£3,249	£3.74m	
Retail Services	6													374				
Vacant	1													97				
ALL RETAIL GOODS AND SERVICES	14				£3.10m				£0.39m					2244				
ZONE 4+5 Remainder																		
Convenience																		
Co-op	1	1375	825	£4,058	£3.35m	153	92	£4,612	£2.42m									

TABLE 19A: FUTURE FLOORSPACE AND TURNOVER - 2017

All monetary values in 2011 prices

	No.	GFA Sq M	NFA Sq M	Convenience		General Comparison		GFA Sq M	NFA Sq M	Bulk Goods		GFA Sq M	NFA Sq M	All Goods	
				Turnover Rate £/Sq M	Total Turnover £m	Turnover Rate £/Sq M	Total Turnover £m			Turnover Rate £/Sq M	Total Turnover £m			Turnover Rate £/Sq M	Total Turnover £m
ZONE 21 Remainder				£11.09m		£9.29m				£1.04m					
Convenience	Co-op	1	1417	850	£7.831	£6.66m	157	94	£4.670	£0.44m					
	Other Convenience	3	302	196	£2.402	£0.47m									
	Total Convenience	4	1719	1046	£7.13m	£0.73m	157	94	£4.670	£0.44m					
Comparison		3					198	235	£2.865	£0.67m					
	Total Floorspace (Retail Goods)	7	1719	1046	£6.812	£7.13m	356	329	£3.383	£1.11m			£2.639	£0.15m	
	Retail Services	11													
	Vacant	0													
	ALL RETAIL GOODS AND SERVICES	18												2366	
ZONE 22 Laurencekirk TC				£1.97m		£0.87m				£0.00m					
Convenience		5	1399	909	£5.531	£5.03m									
Comparison		12					858	558	£3.720	£2.08m					
	Total Floorspace (Retail Goods)	17	1399	909	£5.531	£5.03m	858	558	£3.720	£2.08m			£1.482	£0.92m	
	Retail Services	14													
	Vacant	2													
	ALL RETAIL GOODS AND SERVICES	33												4349	
ZONE 22 Inverberrie TC				£5.03m		£2.08m				£0.92m					
Convenience		6	1510	982	£3.202	£3.14m									
Comparison		5					528	343	£4.323	£1.48m					
	Total Floorspace (Retail Goods)	11	1510	982	£3.202	£3.14m	528	343	£4.323	£1.48m			£1.860	£0.40m	
	Retail Services	4													
	Vacant	1													
	ALL RETAIL GOODS AND SERVICES	16												2876	
ZONE 22				£3.14m		£1.48m				£0.40m					
Convenience		7	862	561	£2.242	£1.26m									
Comparison		1					28	18	£4.628	£0.08m					
	Total Floorspace (Retail Goods)	8	862	561	£2.242	£1.26m	28	18	£4.628	£0.08m			#DIV/0!	£0.00m	
	Retail Services	8													
	Vacant	4													
	ALL RETAIL GOODS AND SERVICES	20												2334	
ZONE 23				£1.26m		£0.08m				£0.00m					
Convenience		4	326	212	£2.573	£0.54m									
Comparison	RW Units (Denmore)	9					0	0	£0.00m	£0.00m					
	Site 4 Denmore (implement by 2017)		4560	2736	£12.006	£32.85m	2280	1368	£4.507	£6.17m			£1.603	£23.83m	
	Dunford	3	392	255	£4.288	£1.00m	116	77	£3.380	£0.26m			£1.603	£-9.20m	
	Total Floorspace (Retail Goods)	13	5278	3203	£10.769	£14.49m	2398	1445	£4.447	£6.42m			£1.603	£14.63m	
	Retail Services	4													
	Vacant	1													
	ALL RETAIL GOODS AND SERVICES	18												21972	
ZONE 24N Dyce				£34.49m		£6.42m				£14.63m					
Convenience	ASDA	1	4687	2578	£12.862	£33.15m	2982	1640	£8.241	£13.52m			£6.398	£3.00m	
	Other Convenience	1	92	60	£2.756	£0.16m									
	Total Convenience	2	4779	2637	£15.618	£33.32m	2982	1640	£8.241	£13.52m			£6.398	£3.00m	
Comparison	Other Comparison	5					803	522	£4.120	£2.15m			£2.285	£0.14m	
	Total Floorspace (Retail Goods)	7	4778	2637	£12.634	£33.32m	3786	2162	£7.246	£15.67m			£5.932	£3.14m	
	Retail Services	4													
	Vacant	4													
	ALL RETAIL GOODS AND SERVICES	15												10268	
ZONE 24N Remainder				£33.32m		£15.67m				£2.96m					
Convenience	Total Convenience	3	854	555	£2.760	£1.53m									
Comparison	Total Comparison	1					67	43	£4.061	£0.18m					
	Total Floorspace (Retail Goods)	4	854	555	£2.760	£1.53m	67	43	£4.061	£0.18m			#DIV/0!	£0.00m	
	Retail Services	10													
	Vacant	4													
	ALL RETAIL GOODS AND SERVICES	18												1622	
Zone 24S				£1.53m		£0.18m				£0.17m					
Convenience	Lidl	1	967	725	£4.348	£3.15m	171	128	£5.808	£0.74m					
	Other Convenience	11	2221	1443	£3.261	£4.71m									
	Total Convenience	12	3187	2168	£7.609	£7.86m	171	128	£5.808	£0.74m					
Comparison	Total Comparison	4					255	165	£4.356	£0.72m			£6.66	£0.43	
	Total Floorspace (Retail Goods)	28	3187	2168	£3.624	£7.86m	425	293	£4.990	£1.46m			£3.487	£0.15m	
	Retail Services	15													
	Vacant	3													
	ALL RETAIL GOODS AND SERVICES	46												5387	
ZONE 25 Middleton Park				£7.86m		£1.46m				£0.15m					
Convenience	ASDA	1	3597	1979	£11.015	£21.79m	1285	707	£4.644	£3.28m			£5.018	£0.71m	
Comparison	Major Units	0													
	Total Floorspace (Retail Goods)	1	3597	1979	£11.015	£21.79m	1285	707	£4.644	£3.28m			£5.018	£0.71m	
	Retail Services	6													
	Vacant	0													
	ALL RETAIL GOODS AND SERVICES	7												5787	
Danestone Zone 25				£21.79m		£3.28m				£0.71m					
Convenience	Tesco	1	6657	4327	£10.767	£46.59m	5326	3462	£7.249	£25.10m			£4.430	£3.83m	
	Other Conv	1	113	74	£2.692	£0.20m									
	Total Convenience	2	6770	4401	£13.459	£46.79m	5326	3462	£7.249	£25.10m			£4.430	£3.83m	
Comparison	Total Comparison	1					43	28	£3.625	£0.10m					
	Total Floorspace (Retail Goods)	1	6771	4401	£10.632	£46.79m	5369	3490	£7.221	£25.20m			£4.430	£3.83m	
	Retail Services	5													
	Vacant	0													
	ALL RETAIL GOODS AND SERVICES	6												13919	
Other Zone 25				£46.79m		£25.20m				£3.83m					
Convenience	Total Convenience	6	1057	687	£4.032	£2.77m									
Comparison	Total Comparison	2					167	108	£5.355	£0.58m					
	Total Floorspace (Retail Goods)	8	1057	687	£4.032	£2.77m	167	108	£5.355	£0.58m			#DIV/0!	£0.00m	
	Retail Services	9													
	Vacant	1													
	ALL RETAIL GOODS AND SERVICES	18												2382	
ZONE 26 Kittybrewster				£2.77m		£0.58m				£0.00m					
Convenience	Total Convenience	0													
Comparison	Major Units	12					3697	2773	£4.151	£11.51m			£2.547	£18.12m	
	Total Floorspace (Retail Goods)	0	0	0	#DIV/0!	£0.00m	3697	2773	£4.151	£11.51m			£2.547	£18.12m	
	Retail Services	0													
	Vacant	1													
	ALL RETAIL GOODS AND SERVICES	13												17044	
Other Zone 26				£0.00m		£11.51m				£18.12m					
Convenience	Lidl	1	1063	789	£3.069	£2.42m	186	139	£2.598	£0.36m					
	Other Convenience	42	4739	3081	£2.295	£7.07m									
	Tesco Exp GNRJ (implement by 2017)	2	230	160	£5.736	£0.92m									
	Total Convenience	43	5792	3870	£3.400	£9.48m	186	139	£2.598	£0.36m					
Comparison	Total Comparison	52					7756	5041	£1.949	£9.82m			£4.10m	£20.08m	
	Total Floorspace (Retail Goods)	95	5792	3870	£2.451	£9.48m	7								

TABLE 19A: FUTURE FLOORSPACE AND TURNOVER - 2017

All monetary values in 2011 prices

	No.	GFA		Convenience		General Comparison		Bulk Goods		All Goods						
		Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m			
ZONE 27																
Remainder Zone 27																
Convenience	25	3310	2151	£1,805	£3.88m	3275	2128	£2,751	£5.85m	4813	3129	£875	£2.74m	3310	2151	£3.88m
Comparison	39													8088	5257	£8.59m
Total Floorspace (Retail Goods)	64	3310	2151	£1,805	£3.88m	3275	2128	£2,751	£5.85m	4813	3129	£875	£2.74m	11397	7408	£12.48m
Retail Services	40				£0.00m				£0.00m					2532		
Vacant	12													1242		
ALL RETAIL GOODS AND SERVICES	116				£3.88m				£5.85m				£2.74m	15171		
ZONE 28																
Mastrick																
Convenience	8	1154	750	£4,569	£3.43m	882	573	£3,879	£2.22m	159	103	£3,062	£0.32m	1154	750	£3.43m
Comparison	4													1040	676	£2.54m
Total Floorspace (Retail Goods)	12	1154	750	£4,569	£3.43m	882	573	£3,879	£2.22m	159	103	£3,062	£0.32m	2194	1426	£5.97m
Retail Services	11				£0.00m				£0.00m					1525		
Vacant	1													72		
ALL RETAIL GOODS AND SERVICES	24				£3.43m				£2.22m				£0.32m	3791		
Zone 28 Remainder																
Convenience	17	3880	2522	£2,102	£5.30m	257	167	£3,566	£0.59m	0	0		£0.00m	3880	2522	£5.30m
Comparison	3					3250	2438	£5,943	£14.49m	3250	2438	£1,738	£4.24m	6500	4875	£18.72m
Total Floorspace (Retail Goods)	20	3880	2522	£2,102	£5.30m	257	167	£3,566	£0.59m	0	0	£1,738	£4.24m	7396	7564	£24.62m
Retail Services	29				£0.00m				£0.00m					2020		
Vacant	2													179		
ALL RETAIL GOODS AND SERVICES	51				£5.30m			£15.08m					£4.24m	9585		
ZONE 29N																
Convenience	1	3917	2546	£13,178	£33.56m	2285	1485	£7,810	£11.60m	326	212	£4,941	£1.05m	6529	4244	£46.20m
Comparison	1	924	693	£3,765	£2.91m	163	122	£4,463	£0.55m					1088		
Total Floorspace (Retail Goods)	2	3917	2546	£13,178	£33.56m	2285	1485	£7,810	£11.60m	326	212	£4,941	£1.05m	7617	4244	£52.20m
Retail Services	17				£39.91m				£12.15m					9655	5569	£49.94m
Vacant	1								£2.06m					1907	1239	£3.91m
ALL RETAIL GOODS AND SERVICES	34	6880	4564	£8,743	£39.91m	3895	2623	£5,841	£15.32m	1286	836	£3,466	£2.90m	12061	7208	£7.626
ZONE 29S																
Garthdee																
Convenience	1	5686	3127	£16,768	£52.44m	6397	3518	£4,442	£15.63m	2132	1173	£3,716	£4.36m	14216	7819	£72.43m
Comparison	1	4478	2687	£16,768	£45.05m	2612	1567	£4,442	£6.96m	373	224	£3,716	£0.83m	7464	4478	£52.85m
Total Floorspace (Retail Goods)	2	10164	5814	£16,768	£97.49m	9009	5086	£8,884	£22.59m	2506	1397	£5,199	£5.19m	21679	12297	£125.27m
Retail Services	0				£0.00m				£4.59m					13213	9910	£20.76m
Vacant	0								£27.18m					3492	22207	£146.04m
ALL RETAIL GOODS AND SERVICES	5				£97.49m			£4,320	£27.18m	14111	10101	£2,115	£0.00m	0	0	£146.04m
ZONE 29S																
Cults																
Convenience	3	756	492	£4,354	£2.14m	2175	1414	£2,827	£4.00m	48	31	£3,895	£0.12m	756	492	£2.14m
Comparison	14								£4.00m					2223	1445	£4.12m
Total Floorspace (Retail Goods)	14	756	492	£4,354	£2.14m	2175	1414	£2,827	£4.00m	48	31	£3,895	£0.12m	2979	1936	£3.232
Retail Services	15				£0.00m				£0.00m					1406		
Vacant	2													401		
ALL RETAIL GOODS AND SERVICES	31				£2.14m				£4.00m				£0.12m	4786		
Remainder Zone 29S																
Convenience	13	2118	1377	£2,934	£4.04m	1449	942	£3,032	£2.86m	211	137	£2,626	£0.36m	2118	1377	£4.04m
Comparison	14								£2.86m					1660	1079	£3.22m
Total Floorspace (Retail Goods)	27	2118	1377	£2,934	£4.04m	1449	942	£3,032	£2.86m	211	137	£2,626	£0.36m	3778	2456	£2.954
Retail Services	24				£0.00m				£0.00m					1946		
Vacant	3													117		
ALL RETAIL GOODS AND SERVICES	54				£4.04m				£2.86m				£0.36m	5840		
ZONE 30																
Torry																
Convenience	9	1410	916	£3,079	£2.82m	1135	737	£3,097	£2.28m	301	196	£1,931	£0.38m	1410	916	£2.82m
Comparison	14								£2.28m					1436	933	£2.85m
Total Floorspace (Retail Goods)	14	1410	916	£3,079	£2.82m	1135	737	£3,097	£2.28m	301	196	£1,931	£0.38m	2846	1850	£2.964
Retail Services	32				£0.00m				£0.00m					2325		
Vacant	6													361		
ALL RETAIL GOODS AND SERVICES	52				£2.82m				£2.28m				£0.38m	5532		
ZONE 30																
Beach Boulevard RP																
Convenience	1	5019	2781	£12,230	£33.76m	3184	1757	£5,418	£9.52m	913	502	£4,796	£2.41m	9126	5019	£45.68m
Comparison	1	1236	803	£4,388	£3.51m	216	142	£3,870	£0.55m					1454		
Total Floorspace (Retail Goods)	2	5019	2781	£12,230	£33.76m	3184	1757	£5,418	£9.52m	913	502	£4,796	£2.41m	10580	5019	£50.14m
Retail Services	8				£39.68m				£10.07m					11499	5019	£45.68m
Vacant	0								£11.36m					11145	8359	£20.85m
ALL RETAIL GOODS AND SERVICES	11	7175	4253	£9,328	£39.68m	7325	4833	£4,432	£21.42m	8144	5925	£1,974	£11.70m	22644	13378	£4.958
ZONE 30																
Remainder																
Convenience	34	4644	3019	£2,103	£6.35m	3310	2151	£2,972	£6.39m	2483	1614	£1,640	£2.65m	4644	3019	£6.35m
Comparison	34								£6.39m					10437	3765	£9.04m
Total Floorspace (Retail Goods)	68	4644	3019	£2,103	£6.35m	3310	2151	£2,972	£6.39m	2483	1614	£1,640	£2.65m	15081	6784	£2.268
Retail Services	78				£0.00m				£0.00m					8916		
Vacant	7													4598		
ALL RETAIL GOODS AND SERVICES	153				£6.35m				£6.39m				£2.65m	28595		
ZONE 31																
Portlethen																
Convenience	1	5684	3126	£10,463	£32.71m	2368	1303	£6,331	£8.25m	2487	1368	£3,770	£5.16m	9473	5210	£46.11m
Comparison	2	493	321	£3,500	£0.84m				£8.25m					493	321	£0.84m
Total Floorspace (Retail Goods)	3	6177	3447	£13,963	£33.55m	2368	1303	£6,331	£8.25m	2487	1368	£3,770	£5.16m	9966	5531	£46.95m
Retail Services	4				£39.65m				£16.14m					11254	8441	£23.49m
Vacant	3								£0.44m					343	223	£0.58m
ALL RETAIL GOODS AND SERVICES	10	6177	3447	£9,734	£33.55m	7375	5033	£4,932	£24.82m	9078	6301	£2,007	£12.64m	21563	14194	£5.003
ZONE 32																
Wellington Rd East																
Convenience	1	2435	1582	£10,306	£16.31m	271	176	£6,726	£1.18m					2705	1758	£17.49m
Comparison	1	935	701	£2,945	£2.07m	165	124	£3,844	£0.48m					1100	825	£2.54m
Total Floorspace (Retail Goods)	2	1504	977	£13,251	£18.38m	436	300	£10,572								

TABLE 20A: FUTURE FLOORSPACE AND TURNOVER - 2022

All monetary values in 2011 prices

	No.	GFA Sq M	NFA Sq M	Convenience		General Comparison				GFA Sq M	NFA Sq M	Bulky Goods		GFA Sq M	NFA Sq M	All Goods		
				Turnover Rate £/Sq M	Total Turnover £m	Turnover Rate £/Sq M	Total Turnover £m	Turnover Rate £/Sq M	Total Turnover £m			Turnover Rate £/Sq M	Total Turnover £m			Turnover Rate £/Sq M	Total Turnover £m	
CITY CENTRE (ZONES 26, 27 & 30)																		
Convenience																		
Supermarkets																		
Co-op, Union Street	1	1469	882	£5,077	£4.48m	77	46	£7,082	£0.33m							1547	928	£4.80m
Morrisons King Street	1	4647	2417	£9,968	£24.09m	1660	863	£13,904	£12.00m	332	173	£8,907	£1.54m	6639	3452	£37.63m	£5.12m	
Co-op, George Street	1	1565	939	£5,077	£4.77m	82	49	£7,082	£0.35m					1647	988	£4.80m	£5.12m	
Other Convenience	72	11542	7502	£2,492	£18.69m									11542	7502	£18.69m	£66.24m	
Total Convenience	75	19223	11739		£52.02m	1819	959		£12.68m	332	173		£1.54m	21374	12870			
Comparison																		
Bon Accord	46	115	75	£3,115	£0.23m	24061	15639	£11,297	£176.67m					24176	15714	£176.91m		
St Nicholas	18					6678	4341	£11,297	£49.04m					6678	4341	£49.04m		
Union Square	61	116	76	£3,115	£0.24m	28600	18590	£11,297	£210.00m	2270	1476	£7,126	£10.51m	30986	20141	£220.75m		
Trinity	22	439	285	£3,115	£0.89m	5357	3482	£10,428	£36.31m					5796	3767	£37.20m		
Academy	12	170	111	£2,492	£0.28m	583	379	£6,952	£2.63m					753	489	£113.84m		
Galleria	7					112	73	£6,083	£0.44m					112	73	£0.44m		
Market	7	879	704	£1,557	£1.10m	879	704	£4,345	£3.06m					1759	1407	£4.15m		
Other Major Units																		
MARKS & SPENCER	1	2580	1677	£6,541	£10.97m	7223	4695	£7,299	£34.27m	516	335	£7,482	£2.51m	10318	6707	£47.74m		
PRIMARK	1					11849	7702	£7,925	£61.04m					11849	7702	£61.04m		
BRITISH HOME STORES	1					6961	3939	£4,635	£18.26m	673	438	£4,751	£2.08m	6734	4377	£20.34m		
JOHN LEWIS PARTNERSHIP	1					12045	7829	£12,156	£96.25m	4015	2610	£7,126	£18.69m	16989	10439	£113.84m		
Other Comparison	215					48992	31650	£6,952	£220.03m	13251	8613	£5,344	£46.03m	61944	40264	£266.06m		
Total Comparison	385	4299	2927		£13.70m	152140	99023		£906.99m	20726	13472		£79.73m	177165	115421		£1,006.42m	
Total Floorspace (Retail Goods)	460	23522	14665	£4,481	£65.72m	153959	99811	£9,198	£919.67m	21058	13644	£5,956	£81.27m	198539	128291	£8,314	£1,066.66m	
Retail Services	365				£0.00m				£0.00m				£0.00m				£7215	
Vacant	86				£0.00m				£0.00m				£0.00m				13847	
ALL RETAIL GOODS AND SERVICES	891				£65.72m				£919.67m				£81.27m				269501	
ZONE 1+3 Abovne Town Centre																		
Convenience																		
Co-op	1	838	503	£8,541	£4.29m	93	56	£5,249	£0.29m					931	559	£4.59m		
Other	2	346	225	£3,144	£0.71m									346	225	£0.71m		
Total Convenience	3	1184	728		£5.00m	93	56		£0.29m	0	0	#DIV/0!	£0.00m	1277	784	£5.30m		
Comparison																		
Total Floorspace (Retail Goods)	12	1184	728	£6,873	£5.00m	1095	712	£3,864	£2.75m	0	0	#DIV/0!	£0.00m	1095	712	£2.75m		
Retail Services	13				£0.00m	1198	768	£3,965	£0.00m	0	0	#DIV/0!	£0.00m	2372	1496	£5.380	£0.55m	
Vacant	0				£0.00m				£0.00m				£0.00m	0	0		0	
ALL RETAIL GOODS AND SERVICES	25				£5.00m				£3.04m				£0.00m				3605	
ZONE 1+3 Ballater Town Centre																		
Convenience																		
Co-op	1	310	186	£8,177	£1.52m									310	186	£1.52m		
Other	5	475	309	£3,010	£0.93m									475	309	£0.93m		
Total Convenience	6	785	495		£2.45m									785	495			
Comparison																		
Total Floorspace (Retail Goods)	28	785	495	£4,952	£2.45m	2706	1759	£2,220	£3.90m	86	56	£3,043	£0.17m	2792	1815	£4.07m		
Retail Services	34				£0.00m	2706	1759	£2,220	£3.90m	85	56	£3,043	£0.17m	3576	2310	£2,825	£6.52m	
Vacant	1				£0.00m				£0.00m				£0.00m	687	108			
ALL RETAIL GOODS AND SERVICES	45				£2.45m				£3.90m				£0.17m	4371	3023			
ZONE 1+3 Remainder																		
Convenience																		
Co-op	9	1094	711	£3,975	£2.83m									1094	711	£2.83m		
Other	18					2173	1413	£2,842	£4.01m	0	0	#DIV/0!	£0.00m	2173	1413	£4.01m		
Total Convenience	27	1094	711	£3,975	£2.83m	2173	1413	£2,842	£4.01m	0	0	#DIV/0!	£0.00m	3267	2124	£3,221	£6.84m	
Comparison																		
Total Floorspace (Retail Goods)	18				£0.00m				£0.00m				£0.00m	1043	114			
Retail Services	13				£0.00m				£0.00m				£0.00m	114	114			
Vacant	3				£0.00m				£0.00m				£0.00m	0	0			
ALL RETAIL GOODS AND SERVICES	43				£2.83m				£4.01m				£0.00m	4424	2228			
ZONE 2 Aiford Town Centre																		
Convenience																		
Total Convenience	4	693	451	£2,951	£1.33m									693	451	£1.55m		
Comparison																		
Total Floorspace (Retail Goods)	12	693	451	£2,951	£1.33m	1145	744	£3,807	£2.83m	1349	877	£2,638	£2.31m	2494	1621	£2,484	£5.15m	
Retail Services	16				£0.00m	1145	744	£3,807	£2.83m	1349	877	£2,638	£2.31m	3188	2072	£2,484	£5.15m	
Vacant	2				£0.00m				£0.00m				£0.00m	302	302			
ALL RETAIL GOODS AND SERVICES	30				£4.08m				£2.73m				£2.31m	4732	3323			
ZONE 2 Remainder																		
Convenience																		
Co-op	1	730	438	£8,018	£3.51m	38	23	£10,343	£0.24m					769	461	£3.74m		
Other	2	286	186	£2,459	£0.46m									286	186	£0.46m		
Total Convenience	3	1017	624		£3.97m	38	23		£0.24m	0	0	#DIV/0!	£0.00m	1055	647	£4.20m		
Comparison																		
Total Floorspace (Retail Goods)	5	1017	624	£6,360	£3.97m	794	516	£3,173	£1.64m	0	0	#DIV/0!	£0.00m	794	516	£1.64m		
Retail Services	8				£0.00m	832	539	£3,479	£1.88m	0	0	#DIV/0!	£0.00m	1849	1163	£1,407	£1.64m	
Vacant	4				£0.00m				£0.00m				£0.00m	284	402			
ALL RETAIL GOODS AND SERVICES	16				£1.22m				£1.98m				£0.00m	2535	1569			
ZONE 4+5 Huntly Town Centre																		
Convenience																		
Co-op	10	1871	1216	£1,517	£1.85m									1871	1216	£1.85m		
Other	37					3588	2332	£3,939	£9.19m	3453	2244	£1,883	£4.23m	7040	4576	£13.41m		
Total Convenience	47	1871	1216	£1,517	£1.85m	3588	2332	£3,939	£9.19m	3453	2244	£1,883	£4.23m	8911	5792	£2,634	£15.26m	
Comparison																		
Total Floorspace (Retail Goods)	22				£25.58m				£17.82m				£4.90m	2528	1611			
Retail Services	6				£0.00m				£0.00m				£0.00m	741	741			
Vacant	6				£0.00m				£0.00m				£0.00m	0	0			
ALL RETAIL GOODS AND SERVICES	75				£25.58m				£17.82m				£4.90m	12180	3092			
ZONE 4+5 Insch Centre																		
Convenience																		
Co-op	4	1378	896	£3,469	£3.11m									1378	896	£3.11m		
Other	3																	

TABLE 20A: FUTURE FLOORSPACE AND TURNOVER - 2022

All monetary values in 2011 prices

	No.	GFA Sq M	NFA Sq M	Convenience		General Comparison		GFA Sq M	NFA Sq M	Bulk Goods		GFA Sq M	NFA Sq M	All Goods			
				Turnover Rate £/Sq M	Total Turnover £m	Turnover Rate £/Sq M	Total Turnover £m			Turnover Rate £/Sq M	Total Turnover £m			Turnover Rate £/Sq M	Total Turnover £m		
ZONE 21 Remainder				£11.74m		£11.50m				£1.31m							
Convenience	Co-op	1	1417	850	£8,242	£7,01m	157	94	£5,758	£0.54m			1574	868	£7.55m		
	Other Convenience	3	302	196	£2,528	£0.50m							302	124	£0.50m		
	Total Convenience	4	1719	1046	£7.50m	£7.50m	157	94	£5.758	£0.54m	0	0	1637	992	£8.05m		
Comparison		3					198	235	£3,533	£0.85m	87	57	286	257	£1.02m		
	Total Floorspace (Retail Goods)	7	1719	1046	£7,171	£7.50m	356	329	£4,171	£1.37m	87	57	£3,331	£0.19m	1923	1249	£7.260
	Retail Services	11											921		£9.06m		
	Vacant	0											0				
	ALL RETAIL GOODS AND SERVICES	18											2366				
ZONE 22 Laurencekirk TC				£2.00m		£1.02m				£0.00m							
Convenience		5	1399	909	£6,005	£5.46m							1399	909	£5.46m		
Comparison		12					858	558	£4,646	£2.59m	950	617	1808	1175	£3.73m		
	Total Floorspace (Retail Goods)	17	1399	909	£6,005	£5.46m	858	558	£4,646	£2.59m	950	617	£1,846	£1.14m	3207	2084	£4.410
	Retail Services	14											3207		£9.19m		
	Vacant	2											670				
	ALL RETAIL GOODS AND SERVICES	33											4349				
ZONE 22 Inverberrie TC				£5.46m		£2.59m				£1.14m							
Convenience		6	1510	982	£3,476	£3.41m							1510	982	£3.41m		
Comparison		5					528	343	£5,363	£1.84m	332	216	861	560	£2.34m		
	Total Floorspace (Retail Goods)	11	1510	982	£3,476	£3.41m	528	343	£5,363	£1.84m	332	216	£2,305	£0.50m	2371	1541	£3.733
	Retail Services	4											329		£3.75m		
	Vacant	1											21				
	ALL RETAIL GOODS AND SERVICES	16											2876				
ZONE 22				£3.41m		£1.84m				£0.50m							
Convenience		7	862	561	£2,435	£1.36m							862	561	£1.36m		
Comparison		1					28	18	£5,780	£0.10m	0	0	28	18	£0.10m		
	Total Floorspace (Retail Goods)	8	862	561	£2,435	£1.36m	28	18	£5,780	£0.10m	0	0	#DIV/0!	£0.00m	890	578	£2.539
	Retail Services	8											1115		£1.47m		
	Vacant	4											329				
	ALL RETAIL GOODS AND SERVICES	20											2334				
ZONE 23				£1.36m		£0.10m				£0.00m							
Convenience		4	326	212	£2,772	£0.59m							326	212	£0.59m		
Comparison	RW Units (Denmore)	9					0	0	#DIV/0!	£0.00m	19822	14866	19822	14866	£29.36m		
	Site 4 Denmore (implement by 2017)		4560	2736	£12,935	£35.39m	2280	1368	£5,582	£7.84m	-7577	-5740	£1,975	£11.33	-737	-1636	£31.69m
	Other Comparison	5	392	255	£4,620	£1.18m	118	77	£4,187	£0.32m			510	332	£1.50m		
	Total Floorspace (Retail Goods)	13	5278	3203	£11,602	£37.15m	2398	1445	£5,508	£7.96m	12245	9127	£1,975	£18.02m	19921	13774	£4.584
	Retail Services	4											452		£63.13m		
	Vacant	1											1598				
	ALL RETAIL GOODS AND SERVICES	18											21972				
ZONE 24N Dyce				£37.15m		£7.96m				£18.02m							
Convenience	ASDA	1	4687	2578	£13,881	£35.78m	2982	1640	£9,880	£16.21m	852	469	£7,882	£3.69m	8521	4687	£55.68m
	Other Convenience	1	92	60	£2,975	£0.18m							92	60	£0.18m		
	Total Convenience	2	4779	2637	£16,856	£35.96m	2982	1640	£9,880	£16.21m	852	469	£7,974	£3.87m	8613	4747	£56.86m
Comparison	Other Comparison	5					803	522	£4,940	£2.58m	92	60	£2,815	£0.17m	895	582	£2.75m
	Total Floorspace (Retail Goods)	7	4778	2637	£13,635	£35.96m	3786	2162	£8,687	£18.79m	944	528	£7,309	£3.86m	9508	5328	£10,999
	Retail Services	4											373		£58.61m		
	Vacant	4											387				
	ALL RETAIL GOODS AND SERVICES	15											10268				
ZONE 24N Remainder				£35.96m		£18.79m				£3.66m							
Convenience	Total Convenience	3	854	555	£2,826	£1.57m							854	555	£1.57m		
Comparison	Total Comparison	1					67	43	£4,721	£0.20m	0	0	67	43	£0.20m		
	Total Floorspace (Retail Goods)	4	854	555	£2,826	£1.57m	67	43	£4,721	£0.20m	0	0	#DIV/0!	£0.00m	920	598	£2.963
	Retail Services	10											702		£1.77m		
	Vacant	4											0				
	ALL RETAIL GOODS AND SERVICES	18											1622				
Zone 24S				£1.57m		£0.20m				£0.00m							
Convenience	Lidl	1	967	725	£5,046	£3.66m	171	128	£7,677	£0.98m			1137	853	£4.64m		
	Other Convenience	11	2221	1443	£3,784	£5.46m							2221	1443	£5.46m		
	Total Convenience	12	3187	2168	£8,830	£9.12m	171	128	£7,677	£0.98m			3358	2296	£10.10m		
Comparison	Total Comparison	28					255	165	£5,758	£1.93m	66	43	£4,661	£0.20m	321	208	£1.15m
	Total Floorspace (Retail Goods)	28	3187	2168	£4,206	£9.12m	425	293	£6,595	£0.90m	66	43	£4,661	£0.20m	3679	2505	£4.494
	Retail Services	15											1306		£11.26m		
	Vacant	3											402				
	ALL RETAIL GOODS AND SERVICES	46											5387				
ZONE 25 Middleton Park				£9.12m		£1.93m				£0.20m							
Convenience	ASDA	1	3597	1979	£12,439	£24.61m	1285	707	£6,156	£4.35m	257	141	£6,441	£0.91m	5139	2827	£29.87m
Comparison	Total Comparison	0															
	Total Floorspace (Retail Goods)	1	3597	1979	£12,439	£24.61m	1285	707	£6,156	£4.35m	257	141	£6,441	£0.91m	5139	2827	£29.87m
	Retail Services	6											648		£10.568		
	Vacant	0											0				
	ALL RETAIL GOODS AND SERVICES	7											5787				
Danesstone Zone 25				£24.61m		£4.35m				£0.91m							
Convenience	Tesco	1	6657	4327	£11,943	£51.68m	5326	3462	£9,214	£31.90m	1331	865	£5,628	£4.87m	13315	8655	£88.45m
	Other Conv	1	113	74	£2,986	£0.22m							113	74	£0.22m		
	Total Convenience	2	6770	4401	£14,929	£51.90m	5326	3462	£9,214	£31.90m	1331	865	£5,628	£4.87m	13428	8729	£88.67m
Comparison	Total Comparison	1					43	28	£4,607	£0.13m			43	28	£0.13m		
	Total Floorspace (Retail Goods)	1	6771	4401	£11,793	£51.90m	5368	3489	£9,178	£32.03m	1331	865	£5,628	£4.87m	13470	8756	£10,141
	Retail Services	5											449		£88.80m		
	Vacant	0											0				
	ALL RETAIL GOODS AND SERVICES	6											13919				
Other Zone 25				£51.90m		£32.03m				£4.87m							
Convenience	Total Convenience	6	1057	687	£4,714	£3.24m							10236	5864	£3.24m		
Comparison	Total Comparison	2					167	108	£7,197	£0.78m	0	0	167	108	£0.78m		
	Total Floorspace (Retail Goods)	8	1057	687	£4,714	£3.24m	167	108	£7,197	£0.78m	0	0	#DIV/0!	£0.00m	12223	795	£5.053
	Retail Services	9											1065		£4.02m		
	Vacant	1											94				
	ALL RETAIL GOODS AND SERVICES	18											2382				
ZONE 26 Kittybrewster				£3.24m		£0.78m				£0.00m							
Convenience	Total Convenience	0											0	0			
Comparison	Major Units	12					3697	2773	£5,030	£13.95m	12374	7114	£3,092	£22.00m	16071	9887	£35.95m
	Total Floorspace (Retail Goods)	12	0	0	#DIV/0!	£0											

TABLE 20A: FUTURE FLOORSPACE AND TURNOVER - 2022

All monetary values in 2011 prices

	No.	GFA		Convenience		General Comparison		Bulk Goods		All Goods		Total Turnover				
		Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m			
ZONE 27																
Remainder Zone 27																
Convenience	25	3310	2151	£1,849	£3.98m	3275	2128	£3,233	£6.88m	4813	3129	£1,032	£3.23m	3310	2151	£3.98m
Comparison	39													8088	5257	£10.11m
Total Floorspace (Retail Goods)	64	3310	2151	£1,849	£3.98m	3275	2128	£3,233	£6.88m	4813	3129	£1,032	£3.23m	11397	7408	£14.09m
Retail Services	40				£0.00m				£0.00m					2532		
Vacant	12													1242		
ALL RETAIL GOODS AND SERVICES	116				£3.98m				£6.88m				£3.23m	15171		
ZONE 28																
Mastrick																
Convenience	8	1154	750	£4,796	£3.60m	882	573	£4,654	£2.67m	159	103	£3,679	£0.38m	1154	750	£3.60m
Comparison	4													1040	676	£3.05m
Total Floorspace (Retail Goods)	12	1154	750	£4,796	£3.60m	882	573	£4,654	£2.67m	159	103	£3,679	£0.38m	2194	1426	£6.64m
Retail Services	11				£0.00m				£0.00m					1525		
Vacant	1													72		
ALL RETAIL GOODS AND SERVICES	24				£3.60m				£2.67m				£0.38m	3791		
Zone 28 Remainder																
Convenience	17	3880	2522	£2,193	£5.53m	257	167	£210	£0.04m	0	0		£0.00m	3880	2522	£5.53m
Comparison	3					3250	2438	£350	£0.85m	3250	2438	£2,104	£5.13m	6500	4975	£15.98m
Total Floorspace (Retail Goods)	20	3880	2522	£2,193	£5.53m	257	167	£5,331	£0.89m	3250	2438	£2,104	£5.13m	7396	5126	£22.25m
Retail Services	29				£0.00m				£0.00m					2020		
Vacant	2													179		
ALL RETAIL GOODS AND SERVICES	51				£5.53m			£0.89m					£5.13m	9595		
ZONE 29N																
Convenience	1	3917	2546	£13,785	£35.10m	2285	1485	£9,591	£14.25m	326	212	£6,008	£1.27m	6529	4244	£50.62m
Comparison	1	924	693	£3,939	£2.75m	163	122	£5,481	£0.67m					1088		£5.98m
Total Floorspace (Retail Goods)	17	6880	4564	£17,724	£37.85m	2448	1608	£15,072	£14.92m	326	212	£6,614	£2.52m	7617	4914	£56.60m
Retail Services	17				£0.00m				£0.00m					1907	1239	£4.78m
Vacant	3													322		
ALL RETAIL GOODS AND SERVICES	67	6880	4564	£17,724	£37.85m	2448	1608	£15,072	£14.92m	326	212	£6,614	£2.52m	14991	6153	£61.38m
ZONE 29S Ganthree																
Convenience	1	5686	3127	£17,371	£54.33m	6397	3518	£5,205	£18.32m	2132	1173	£4,391	£5.15m	14216	7819	£77.70m
Comparison	1	4478	2687	£17,371	£46.67m	2612	1567	£5,205	£8.16m	373	224	£4,391	£0.98m	7464	4478	£55.82m
Total Floorspace (Retail Goods)	2	10164	5814	£17,371	£101.00m	9009	5086	£10,410	£26.47m	2506	1397	£8,782	£6.13m	21679	12297	£133.61m
Retail Services	0				£0.00m				£0.00m					13213	9910	£24.49m
Vacant	0													3492	22207	£158.10m
ALL RETAIL GOODS AND SERVICES	5	10164	5814	£17,371	£101.00m	10617	6291	£15,615	£31.85m	14111	10101	£12,499	£16.24m	34892	22207	£158.10m
ZONE 29S Cults																
Convenience	3	756	492	£4,481	£2.20m	2175	1414	£3,325	£4.70m	48	31	£4,595	£0.14m	756	492	£2.20m
Comparison	14													2223	1445	£4.84m
Total Floorspace (Retail Goods)	14	756	492	£4,481	£2.20m	2175	1414	£3,325	£4.70m	48	31	£4,595	£0.14m	2979	1936	£7.05m
Retail Services	15				£0.00m				£0.00m					1406		
Vacant	2													401		
ALL RETAIL GOODS AND SERVICES	31				£2.20m			£3.185m					£0.14m	4786		
Remainder Zone 29S																
Convenience	13	2118	1377	£3,005	£4.14m	1449	942	£3,567	£3.36m	211	137	£3,097	£0.43m	2118	1377	£4.14m
Comparison	14													1660	1079	£3.78m
Total Floorspace (Retail Goods)	27	2118	1377	£3,005	£4.14m	1449	942	£3,567	£3.36m	211	137	£3,097	£0.43m	3778	2456	£7.92m
Retail Services	24				£0.00m				£0.00m					1946		
Vacant	3													117		
ALL RETAIL GOODS AND SERVICES	54				£4.14m			£3.36m					£0.43m	5840		
ZONE 30 Torry																
Convenience	9	1410	916	£3,153	£2.89m	1135	737	£3,633	£2.68m	301	196	£2,277	£0.45m	1410	916	£2.89m
Comparison	14													1436	933	£3.13m
Total Floorspace (Retail Goods)	14	1410	916	£3,153	£2.89m	1135	737	£3,633	£2.68m	301	196	£2,277	£0.45m	2846	1850	£6.01m
Retail Services	32				£0.00m				£0.00m					2325		
Vacant	6													361		
ALL RETAIL GOODS AND SERVICES	52				£2.89m			£2.68m					£0.45m	5532		
ZONE 30 Beach Boulevard RP																
Convenience	1	5019	2781	£12,757	£36.21m	3194	1757	£6,504	£11.42m	913	502	£5,783	£2.90m	9126	5019	£49.54m
Comparison	1	1236	803	£4,556	£3.66m	218	142	£4,645	£0.65m					1454		£3.73m
Total Floorspace (Retail Goods)	11	7175	4253	£17,313	£39.87m	3412	1899	£11,149	£12.08m	913	502	£6,386	£3.80m	10580	5521	£53.27m
Retail Services	0				£0.00m				£0.00m					1145	8359	£24.94m
Vacant	0													0		
ALL RETAIL GOODS AND SERVICES	11	7175	4253	£17,313	£39.87m	3412	1899	£11,149	£12.08m	914	502	£6,386	£3.80m	12644	13378	£78.21m
ZONE 30 Remainder																
Convenience	34	4644	3019	£2,154	£6.50m	3310	2151	£3,487	£7.50m	2483	1614	£1,934	£3.12m	4644	3019	£6.50m
Comparison	34													10437	3765	£10.62m
Total Floorspace (Retail Goods)	68	4644	3019	£2,154	£6.50m	3310	2151	£3,487	£7.50m	2483	1614	£1,934	£3.12m	15081	6784	£25.24m
Retail Services	78				£0.00m				£0.00m					8916		
Vacant	7													4598		
ALL RETAIL GOODS AND SERVICES	153				£6.50m			£7.50m					£3.12m	28595		
ZONE 31 Portlethen																
Convenience	1	5684	3126	£11,452	£35.80m	2368	1303	£7,991	£10.41m	2487	1368	£4,658	£6.37m	9473	5210	£52.58m
Comparison	2	493	321	£3,500	£0.92m									493	321	£0.92m
Total Floorspace (Retail Goods)	10	6177	3447	£14,952	£36.72m	2368	1303	£7,991	£10.41m	2487	1368	£4,658	£6.37m	9966	5531	£53.50m
Retail Services	4				£0.00m				£0.00m					11254	8441	£29.45m
Vacant	1													343	223	£0.72m
ALL RETAIL GOODS AND SERVICES	24	6177	3447	£14,952	£36.72m	2368	1303	£7,991	£10.41m	2487	1368	£4,658	£6.37m	11597	8664	£83.67m
ZONE 32																
Convenience	1	2435	1582	£11,118	£17.59m	271	176	£8,169	£1.44m					2705	1758	£19.03m
Comparison	1	935	701	£3,177	£2.23m	165	124	£4,668	£0.88m					1100	825	£2.81m
Total Floorspace (Retail Goods)	3	1504	977	£14,295	£19.82m	436	300	£12,837	£2.32m	63	41	£264	£0.01m	1504	977	£22.84m
Retail Services	7		</													

TABLE 21A: FUTURE FLOORSPACE AND TURNOVER - 2027

All monetary values in 2011 prices

	No.	GFA Sq M	NFA Sq M	Convenience		General Comparison				GFA Sq M	NFA Sq M	Bulky Goods		GFA Sq M	NFA Sq M	All Goods		
				Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m			GFA Sq M	NFA Sq M			Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M
CITY CENTRE (ZONES 26, 27 & 30)																		
Convenience																		
<i>Supermarkets</i>																		
Co-op, Union Street	1	1469	882	£5,317	£4.69m	77	46	£8,528	£0.40m							1547	928	£5.08m
Morrisons King Street	1	4647	2417	£10,439	£25.23m	1660	863	£16,742	£14.45m	332	173	£10,856	£1.87m	6639	3452	£41.55m	£41.55m	
Co-op, George Street	1	1565	939	£5,317	£4.99m	82	49	£8,528	£0.42m					1647	988	£5.41m	£5.41m	
Other Convenience	72	11542	7502	£2,610	£19.58m									11542	7502	£19.58m	£19.58m	
Total Convenience	75	19223	11739	£54.48m	£54.48m	1819	959	£15.27m	£15.27m	332	173			21374	12870	£71.62m	£71.62m	
Comparison																		
<i>Bon Accord</i>	46	115	75	£3,262	£0.24m	24061	15639	£13,603	£212.74m					24176	15714	£212.98m	£212.98m	
<i>St Nicholas</i>	18					6678	4341	£13,603	£59.04m					6678	4341	£59.04m	£59.04m	
<i>Union Square</i>	61	116	76	£3,262	£0.25m	28600	18590	£13,603	£252.87m	2270	1476	£8,684	£12.81m	30986	20141	£265.93m	£265.93m	
<i>Trinity</i>	22	439	285	£3,262	£0.93m	5357	3482	£12,556	£43.72m					5796	3767	£44.65m	£44.65m	
<i>Academy</i>	12	170	111	£2,610	£0.29m	583	379	£8,371	£3.17m					753	489	£3.46m	£3.46m	
<i>Galleria</i>	7					112	73	£7,324	£0.54m					112	73	£0.54m	£0.54m	
<i>Market</i>	7	879	704	£1,631	£1.15m	879	704	£5,232	£3.68m					1759	1407	£4.83m	£4.83m	
Other Major Units																		
MARKS & SPENCER	1	2580	1677	£6,850	£11.49m	7223	4695	£8,789	£41.26m	516	335	£9,119	£3.06m	10318	6707	£55.81m	£55.81m	
PRIMARK	1					11849	7702	£9,543	£73.50m					11849	7702	£73.50m	£73.50m	
BRITISH HOME STORES	1					8082	5253	£4,185	£21.99m	898	584	£4,342	£2.53m	8980	5837	£24.52m	£24.52m	
JOHN LEWIS PARTNERSHIP	1					12045	7829	£14,649	£14.64m	4015	2610	£8,684	£22.86m	16969	10439	£137.36m	£137.36m	
Other Comparison	215					48692	31650	£8,371	£264.94m	13251	8613	£6,513	£56.10m	61944	40264	£321.04m	£321.04m	
Total Comparison	385	4299	2927	£14.34m	£14.34m	154161	100337	£1,092.13m	£1,092.13m	20950	13618			179411	116881	£1,203.65m	£1,203.65m	
Total Floorspace (Retail Goods)	460	23522	14665	£4,693	£68.83m	155980	101295	£1,107.40m	£1,107.40m	21282	13790			200785	129751	£1,275.27m	£1,275.27m	
Retail Services	365													57215				
Vacant	86													13847				
ALL RETAIL GOODS AND SERVICES	891				£68.83m			£1,107.40m						271947				
ZONE 1+3 Abovne Town Centre																		
Convenience																		
Co-op	1	838	503	£8,993	£4.52m	93	56	£6,054	£0.34m					931	559	£4.98m	£4.98m	
Other	2	346	225	£3,310	£0.74m									346	225	£0.74m	£0.74m	
Total Convenience	3	1184	728		£5.27m	93	56		£0.34m					1277	784	£5.61m	£5.61m	
Comparison	9					1095	712	£4,457	£3.17m					1095	712	£3.17m	£3.17m	
Total Floorspace (Retail Goods)	12	1184	728		£5.27m				£3.17m					2372	1496	£8.79m	£8.79m	
Retail Services	13													1233				
Vacant	0													0				
ALL RETAIL GOODS AND SERVICES	25				£5.27m			£3.51m						3605				
ZONE 1+3 Ballater Town Centre																		
Convenience																		
Co-op	1	310	186	£8,615	£1.60m									310	186	£1.60m	£1.60m	
Other	5	475	309	£3,171	£0.98m									475	309	£0.98m	£0.98m	
Total Convenience	6	785	495		£2.58m									785	495	£2.58m	£2.58m	
Comparison	28					2706	1759	£2,585	£4.55m	86	56	£3,728	£0.21m	2792	1815	£4.76m	£4.76m	
Total Floorspace (Retail Goods)	34	785	495		£2.58m	2706	1759	£4.55m	£4.55m	86	56			3576	2310	£7.34m	£7.34m	
Retail Services	10													687				
Vacant	1													108				
ALL RETAIL GOODS AND SERVICES	45				£2.58m			£4.55m						4371				
ZONE 1+3 Remainder																		
Convenience																		
Co-op	9	1094	711	£4,188	£2.98m									1094	711	£2.98m	£2.98m	
Comparison	18					2173	1413	£3,420	£4.83m	0	0			2173	1413	£4.83m	£4.83m	
Total Floorspace (Retail Goods)	27	1094	711		£2.98m	2173	1413	£4.83m	£4.83m	0	0			3267	2124	£7.81m	£7.81m	
Retail Services	13													1043				
Vacant	3													114				
ALL RETAIL GOODS AND SERVICES	43				£2.98m			£4.83m						4424				
ZONE 2 Aiford Town Centre																		
Convenience																		
Total Convenience	4	693	451	£3,073	£1.38m									693	451	£1.38m	£1.38m	
Comparison	12					1145	744	£4,453	£3.31m	1349	877	£3,207	£2.81m	2494	1621	£6.13m	£6.13m	
Total Floorspace (Retail Goods)	16	693	451		£1.38m	1145	744	£4.453	£3.31m	1349	877			3188	2072	£6.13m	£6.13m	
Retail Services	12													1152				
Vacant	2													392				
ALL RETAIL GOODS AND SERVICES	30				£4.25m			£3.13m						4732				
ZONE 2 Remainder																		
Convenience																		
Co-op	1	730	438	£8,349	£3.66m	38	23	£12,097	£0.28m					769	461	£0.48m	£0.48m	
Other	2	286	186	£2,561	£0.48m									286	186	£0.48m	£0.48m	
Total Convenience	3	1017	624		£4.14m	38	23		£0.28m					1055	647	£0.96m	£0.96m	
Comparison	5					794	516	£3,711	£1.91m	0	0			794	516	£1.91m	£1.91m	
Total Floorspace (Retail Goods)	8	1017	624		£4.14m	832	539	£2.19m	£2.19m	0	0			1849	1163	£1.91m	£1.91m	
Retail Services	4													284				
Vacant	4													402				
ALL RETAIL GOODS AND SERVICES	16				£1.27m			£2.38m						2535				
ZONE 4+5 Huntly Town Centre																		
Convenience																		
Co-op	10	1871	1216	£1,582	£1.92m									1871	1216	£1.92m	£1.92m	
Comparison	37					3588	2332	£4,716	£11.00m	3453	2244	£2,274	£5.10m	7040	4576	£16.10m	£16.10m	
Total Floorspace (Retail Goods)	47	1871	1216		£1.92m	3588	2332	£4,716	£11.00m	3453	2244			8911	5792	£18.02m	£18.02m	
Retail Services	22													2528				
Vacant	6													741				
ALL RETAIL GOODS AND SERVICES	75				£26.67m			£21.33m						12180				
ZONE 4+5 Insch Centre																		
Convenience																		
Co-op	4	1378	896	£3,619	£3.24m									1378	896	£3.24m	£3.24m	
Comparison	3					238	155	£3,518	£0.54m	158	102	£3,390	£0.35m	336	257	£0.89m	£0.89m	
Total Floorspace (Retail Goods)	7	1378	896		£3.24m	238	155	£3,518	£0.54m	158	102			1773	1153	£4.13m	£4.13m	
Retail Services	6													374				
Vacant	1													97				
ALL RETAIL GOODS AND SERVICES	14				£3.24m			£0.54m						2244				
ZONE 4+5 Remainder																		
Convenience																		

TABLE 21A: FUTURE FLOORSPACE AND TURNOVER - 2027

All monetary values in 2011 prices

	No.	GFA		Convenience		General Comparison		Bulk Goods		GFA		All Goods	
		Sq M	Sq M	Turnover Rate £/Sq M	Total Turnover £m	Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m
ZONE 7 Macduff TC													
Convenience	6	1011	657	£3,046	£2,00m								
Comparison	19					2228	1448	£3,191	£4,62m	584	380	£2,603	£0,99m
Total Floorspace (Retail Goods)	25	1011	657			2228	1448		£4,62m	584	380		£0,99m
Retail Services	15												£0,00m
Vacant	0												£0,00m
ALL RETAIL GOODS AND SERVICES	40				£2,00m				£4,62m				£0,99m
ZONE 7 Remainder													
Convenience	1	1013	608	£5,600	£3,40m	113	68	£5,264	£0,36m			1126	675
Co-op	17	3595	2336	£1,718	£4,01m							3595	2336
Other Convenience	18	4608	2944		£7,42m	113	68		£0,36m			4720	3012
Total Convenience	9					967	628	£3,230	£2,03m	0	0	857	628
Comparison	27	4608	2944	£7,42m		1079	696	£3,230	£2,03m	0	0	£0,00m	£0,00m
Total Floorspace (Retail Goods)	27	4608	2944										
Retail Services	14												£0,00m
Vacant	5												£0,00m
ALL RETAIL GOODS AND SERVICES	46				£1,00m				£2,74m				£0,00m
ZONE 8													
Convenience	5	1340	871	£1,183	£1,03m							1340	871
Comparison	3					356	232	£3,091	£0,72m	590	383	£1,140	£0,44m
Total Floorspace (Retail Goods)	8	1340	871			356	232		£0,72m	590	383		£0,44m
Retail Services	5												£0,00m
Vacant	5												£0,00m
ALL RETAIL GOODS AND SERVICES	18				£1,03m				£0,72m				£0,44m
ZONE 9													
Convenience	4	754	490	£2,043	£1,00m							754	490
Comparison	2					100	65	£4,998	£0,32m	0	0	100	65
Total Floorspace (Retail Goods)	6	754	490			100	65		£0,32m	0	0		£0,00m
Retail Services	6												£0,00m
Vacant	4												£0,00m
ALL RETAIL GOODS AND SERVICES	16				£1,00m				£0,32m				£0,00m
ZONE 10 Frasersburgh Town Centre													
Convenience	19	3314	2154	£2,748	£5,92m							3314	2154
Comparison	58					9103	5917	£5,632	£33,32m	3661	2379	£2,843	£6,76m
Total Floorspace (Retail Goods)	77	3314	2154			9103	5917		£33,32m	3661	2379		£6,76m
Retail Services	67												£0,00m
Vacant	11												£0,00m
ALL RETAIL GOODS AND SERVICES	155				£61,44m				£55,02m				£8,84m
ZONE 10 Remainder													
Convenience	1	3922	2549	£10,990	£28,01m	1810	1176	£11,264	£13,25m	302	196	£6,633	£1,30m
Lidl	1	1402	1052	£3,140	£3,30m	247	186	£6,436	£1,19m			6033	3922
Other Convenience	23	4779	3106	£1,963	£6,10m							1650	1286
Watermill Road Asda (Implement by 2017)	2017	2458	1748	£10,990	£19,21m	922	466	£11,264	£5,25m	231	117	£6,633	£0,78m
Total Convenience	25	10102	6707		£56,62m	2057	1362		£19,69m	302	196		£2,08m
Comparison	11					2986	1941	£5,632	£10,93m	0	0	2986	1941
Total Floorspace (Retail Goods)	36	10102	6707		£56,62m	5043	3303		£30,62m	302	196		£2,08m
Retail Services	38												£0,00m
Vacant	14												£0,00m
ALL RETAIL GOODS AND SERVICES	88				£1,10m				£8,93m				£0,00m
ZONE 11 Peterhead TC													
Convenience	14	3492	2270	£3,706	£8,41m							3492	2270
Comparison	59					11310	7351	£4,419	£32,48m	3183	2069	£2,685	£5,55m
Total Floorspace (Retail Goods)	83	3492	2270			11310	7351		£37,82m	3183	2069		£5,55m
Retail Services	70												£0,00m
Vacant	11												£0,00m
ALL RETAIL GOODS AND SERVICES	164				£64,27m				£88,24m				£25,38m
ZONE 11 Remainder													
Convenience	1	4136	2275	£11,530	£26,23m	1103	607	£8,837	£5,36m	276	152	£3,579	£0,54m
ASDA	1	2690	1479	£11,530	£17,06m	717	395	£8,837	£3,49m	179	99	£6,264	£0,62m
Lidl	1	1343	1008	£3,130	£3,15m	237	178	£4,797	£0,85m			5514	3033
Other Convenience	2001	2001	1301	£2,059	£2,88m							14493	9423
Total Convenience	25	10170	6062		£49,12m	2057	1179		£9,70m	455	250		£1,16m
Comparison	1					2482	1985	£6,817	£13,53m	4223	3378	£1,521	£5,14m
B&Q	1											4223	3378
Home Bargains	1											2482	1985
Halfords	1											764	611
Other Comparison	13					1129	903	£3,156	£2,85m	2939	1911	£2,237	£4,27m
Kirkcubbin Mills (Implement by 2017)	2017	1308	811	£4,530	£3,67m	1792	1218	£4,419	£5,38m	1465	1015	£2,237	£2,27m
Asda Extension (Implement by 2017)	2017	489	367	£11,530	£4,23m	1271	854	£8,837	£2,85m	196	147	£6,264	£0,92m
Buchan Gateway Ph 2 (Implement by 2017)	2017	1797	1178		£7,91m	6674	5061		£30,20m	14232	10546		£21,71m
Total Comparison	16	1797	1178		£7,91m	6674	5061		£30,20m	14232	10546		£21,71m
Total Floorspace (Retail Goods)	57	11967	7240		£57,02m	8731	6239		£39,90m	14687	10796		£22,87m
Retail Services	23												£0,00m
Vacant	6												£0,00m
ALL RETAIL GOODS AND SERVICES	86				£1,16m				£9,48m				£3,04m
ZONE 12 Mintlaw													
Convenience	4	650	422	£2,876	£1,21m							650	422
Comparison	2					160	104	£7,597	£0,79m	191	124	£4,075	£0,51m
Total Floorspace (Retail Goods)	6	650	422			160	104		£0,79m	191	124		£0,51m
Retail Services	7												£0,00m
Vacant	2												£0,00m
ALL RETAIL GOODS AND SERVICES	15				£1,21m				£0,79m				£0,51m
ZONE 12 Remainder													
Convenience	12	2213	1438	£1,689	£2,43m							2213	1438
Comparison	1					0	0			1479	961	£1,232	£1,18m
Total Floorspace (Retail Goods)	13	2213	1438			0	0		£0,00m	1479	961		£1,18m
Retail Services	9												£0,00m
Vacant	2												£0,00m
ALL RETAIL GOODS AND SERVICES	24				£2,43m				£0,00m				£1,18m
ZONE 13 Ellon TC													
Convenience	1	1403	912	£4,040	£3,68m	248	161	£5,385	£0,87m			1650	1073
Aldi	7	1840	1196	£4,040	£4,83m							1840	1196
Other Convenience	8	3242	2107		£8,51m							3490	2268
Total Convenience	31	0	0			2876	1869	£4,712	£8,81m	1778	1156	£2,613	£3,02m
Comparison	46	3242	2107	£8,51m		2876	1869	£4,712	£8,81m	1778	1156	£2,613	£3,02m
Total Floorspace (Retail Goods)	46	3242	2107			2876	1869		£8,81m	1778	1156		£3,02m
Retail Services	36												£0,00m
Vacant	2												£0,00m
ALL RETAIL GOODS AND SERVICES	84				£42,75m				£15,13m				£6,53m
ZONE 13 Remainder													
Convenience	1	3553	2309	£14,139	£32,65m	947	616	£9,424	£5,80m	237	154	£6,097	£0,94m
Other	6	1695	1102	£2,525	£2,78m							4737	3079
Total Convenience	9	5248	3412		£35,44m								

TABLE 21A: FUTURE FLOORSPACE AND TURNOVER - 2027

All monetary values in 2011 prices

	No.	GFA Sq M	NFA Sq M	Convenience		General Comparison				Bulk Goods		All Goods		
				Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Total Turnover £m	
				£0.92m						£0.80m				
				£0.00m						£0.00m				
ZONE 15 Oldmeldrum TC														
Convenience	3	473	307	£4,488	£1.38m							473	307	£1.38m
Comparison	6					321	209	£5,780	£1.21m	793	516	£3,224	£1.66m	£1.08m
Total Floorspace (Retail Goods)	9	473	307	£1.38m	£1.38m	321	209	£5,780	£1.21m	793	516	£3,224	£1.66m	£4.25m
Retail Services	2													
Vacant	2													
ALL RETAIL GOODS AND SERVICES	22													2331
				£1.38m						£1.21m		£1.66m		
				£6.89m						£0.40m		£1.01m		
ZONE 15 Remainder														
Convenience	5	1259	818	£1,992	£1.63m							1259	818	£1.63m
Comparison	3					154	100	£720	£0.07m	596	388	£2,600	£1.01m	£1.08m
Midmill, Kintore (implement by 2017)	3	1255	753	£6,373	£4.80m	139	84	£1,153	£0.10m			1394	837	£4.90m
Forest Road, Kintore (implement by 2017)	2	224	146	£3,187	£0.47m	416	270	£864	£0.23m			640	416	£0.70m
Total Floorspace (Retail Goods)	8	2738	1717	£6.89m	£6.89m	709	454	£8,891	£0.40m	596	388	£2,600	£1.01m	£8.30m
Retail Services	5													
Vacant	2													
ALL RETAIL GOODS AND SERVICES	15													4455
				£6.89m						£0.40m		£1.01m		
				£6.89m						£0.40m		£1.01m		
ZONE 16 Inverurie TC														
Convenience	1	4733	3076	£10,379	£31.93m	2564	1666	£11,007	£18.34m	592	385	£7,528	£2.89m	£53.16m
Comparison	11	2601	1691	£2,965	£5.01m									£5.01m
Other Convenience	12	7334	4767			2564	1666		£18.34m	592	385			£58.18m
Forest Road, Kintore (implement by 2017)	63					10383	6749	£5,503	£37.14m	3818	2481	£3,226	£8.01m	£45.15m
Inverurie Retail Park	9	1798	1348	£3,336	£4.50m	3917	2938	£7,862	£23.10m	3012	2259	£2,688	£6.07m	£33.67m
Total Floorspace (Retail Goods)	75	9132	6115	£41.44m	£41.44m	16864	11353	£78,588	£78.58m	7421	5125	£16,977	£16.97m	£136.99m
Retail Services	47													
Vacant	0													
ALL RETAIL GOODS AND SERVICES	122													40042
				£87.20m						£92.38m		£27.38m		
				£0.86m						£1.13m		£0.00m		
ZONE 16 Kemnay TC														
Convenience	4	681	443	£1,938	£0.86m					0	0			£0.86m
Comparison	4					409	266	£4,260	£1.13m	0	0			£1.13m
Total Floorspace (Retail Goods)	8	681	443	£0.86m	£0.86m	409	266	£4,260	£1.13m	0	0	£0.00m	£0.00m	£1.99m
Retail Services	8													
Vacant	0													
ALL RETAIL GOODS AND SERVICES	16													1768
				£0.86m						£1.13m		£0.00m		
				£0.86m						£1.13m		£0.00m		
ZONE 16 Remainder														
Convenience	1	3122	1623	£10,379	£16.85m	347	180	£11,007	£1.99m			3469	1804	£18.83m
Comparison	4	531	318	£1,853	£0.59m							531	318	£0.59m
Other Convenience	5	3653	1942			347	180		£1.99m			3999	2122	£19.42m
Others	7					291	174	£3,931	£0.69m	6388	3833	£2,688	£10.30m	£10.99m
Harlaw Road, Inverurie (implement by 2017)	4200	2520		£10,379	£26.16m	1500	900	£11,007	£9.91m	300	180	£7,528	£1.35m	£37.42m
Harlaw Road, Inverurie ALDI (implement by 2017)	1254	815		£3,707	£3.02m	313	203	£7,862	£1.60m			1567	1019	£4.62m
Total Floorspace (Retail Goods)	310	5454	3335	£46.82m	£46.82m	2104	1278	£12,189	£12.18m	6688	4013	£11,666	£11.66m	£53.03m
Retail Services	10													
Vacant	0													
ALL RETAIL GOODS AND SERVICES	20													19550
				£0.86m						£0.38m		£1.25m		
				£0.86m						£0.38m		£1.25m		
ZONE 17														
Convenience	7	1679	1091	£1,389	£1.52m							1679	1091	£1.52m
Comparison	1					45	29	£4,561	£0.13m	0	0			£0.13m
Total Floorspace (Retail Goods)	8	1679	1091	£1.52m	£1.52m	45	29	£4,561	£0.13m	0	0	£0.00m	£0.00m	£1.65m
Retail Services	4													
Vacant	3													
ALL RETAIL GOODS AND SERVICES	15													2486
				£1.52m						£0.13m		£0.00m		
				£1.52m						£0.13m		£0.00m		
ZONE 18 Westhill Town Centre														
Convenience	1	1463	878	£8,622	£7.57m	163	98	£11,419	£1.12m			1650	976	£8.69m
Aldi	1	1427	928	£4,311	£4.00m	252	164	£7,613	£1.25m			1679	1091	£5.25m
Other Convenience	2	388	233	£3,449	£0.80m							388	233	£0.80m
TC Extension (implement by 2017)	4	3278	2038			415	261		£2.36m	0	0	3717	2300	£14.73m
Comparison	8					728	473	£5,329	£2.52m	0	0	728	473	£2.52m
TC Extension (implement by 2017)	8	800	520	£3,449	£1.79m	400	260	£5,329	£1.39m			1200	780	£3.18m
Total Floorspace (Retail Goods)	12	3278	2038	£14.16m	£14.16m	1143	734	£12,189	£12.18m	0	0	4445	2773	£20.43m
Retail Services	15													
Vacant	0													
ALL RETAIL GOODS AND SERVICES	27													6078
				£55.45m						£29.89m		£15.80m		
				£55.45m						£29.89m		£15.80m		
ZONE 18 Remainder														
Convenience	3	771	501	£2,156	£1.08m							771	501	£1.08m
Comparison	1	3438	2501	£12,071	£30.19m	1228	697	£10,658	£7.43m	246	375	£7,932	£2.97m	£40.58m
Other Convenience	4	4208	3002			1228	697		£7.43m	246	375			£41.67m
Others	1					142	92	£3,806	£0.35m			491	750	£0.35m
Costco	1	3938	2560	£4,484	£11.48m	3375	2194	£7,917	£17.37m	3375	2194	£5,892	£12.93m	£11.251
Total Comparison	3	3938	2560			3517	2295		£17.22m	3866	2944			£11,522
Total Floorspace (Retail Goods)	6	8146	5562	£42.75m	£42.75m	4745	2983	£25,151	£25.15m	4112	3319	£15,900	£15.90m	£42.02m
Retail Services	1													
Vacant	2													
ALL RETAIL GOODS AND SERVICES	9													18029
				£1.46m						£1.53m		£0.11m		
				£1.46m						£1.53m		£0.11m		
ZONE 19 Banchoy TC														
Convenience	7	1339	870	£3,355	£2.92m							1339	870	£2.92m
Comparison	34					3027	1968	£5,989	£11.78m	1481	963	£2,953	£2.84m	£14.63m
Total Floorspace (Retail Goods)	41	1339	870	£2.92m	£2.92m	3027	1968	£5,989	£11.78m	1481	963	£2,953	£2.84m	£17.55m
Retail Services	28													
Vacant	2													
ALL RETAIL GOODS AND SERVICES	71													8578
				£41.25m						£19.45m		£6.56m		
				£41.25m						£19.45m		£6.56m		
ZONE 19 Remainder Aberdeenshire														
Convenience	1	3104	2018	£13,420	£27.07m	828	538	£						

TABLE 21A: FUTURE FLOORSPACE AND TURNOVER - 2027

All monetary values in 2011 prices

	No.	GFA Sq M	NFA Sq M	Convenience		General Comparison		GFA Sq M	NFA Sq M	Bulk Goods		GFA Sq M	NFA Sq M	All Goods	
				Turnover Rate £/Sq M	Total Turnover £m	Turnover Rate £/Sq M	Total Turnover £m			Turnover Rate £/Sq M	Total Turnover £m			Turnover Rate £/Sq M	Total Turnover £m
				£12.36m		£14.02m						£1.61m			
ZONE 21 Remainder															
Convenience	Co-op	1	1417	850	£8,674	£7.37m	157	94	£7,016	£0.66m					£8.04m
	Other Convenience	3	302	196	£2,661	£0.52m									£0.52m
	Total Convenience	4	1719	1046	£11,335	£7.90m	157	94	£7,016	£0.66m					£8.56m
Comparison		3					198	235	£4,304	£1.01m	£4,108		£0.23m		£1.24m
	Total Floorspace (Retail Goods)	7	1719	1046	£7.90m	£7.90m	356	329	£11.31m	£1.67m	87	57	£0.23m	1923	£9.80m
	Retail Services	11												921	
	Vacant	0												0	
	ALL RETAIL GOODS AND SERVICES	18												2366	
				£2.10m		£1.23m						£0.00m			
ZONE 22 Laurencekirk TC															
Convenience		5	1399	909	£6.366	£5.79m	858	558	£5.690	£3.17m	950	617	£2.272	£1.40m	£5.79m
Comparison		12													£4.58m
	Total Floorspace (Retail Goods)	17	1399	909	£5.79m	£5.79m	858	558	£5.690	£3.17m	950	617	£2.272	£3.207	£10.36m
	Retail Services	14				£0.00m								870	
	Vacant	2				£0.00m								272	
	ALL RETAIL GOODS AND SERVICES	33												4349	
				£5.79m		£3.17m						£1.40m			
ZONE 22 Inverberrie TC															
Convenience		6	1510	982	£3,685	£3.62m	528	343	£6,551	£2.25m	332	216	£2,833	£0.61m	£3.62m
Comparison		11													£2.86m
	Total Floorspace (Retail Goods)	17	1510	982	£3.62m	£3.62m	528	343	£6,551	£2.25m	332	216	£2,833	£2,271	£6.48m
	Retail Services	4				£0.00m								484	
	Vacant	1				£0.00m								21	
	ALL RETAIL GOODS AND SERVICES	16												2876	
				£3.62m		£2.25m						£0.61m			
ZONE 22															
Convenience		7	862	561	£2,581	£1.45m									£1.45m
Comparison		1					28	18	£7,078	£0.13m					£0.13m
	Total Floorspace (Retail Goods)	8	862	561	£1.45m	£1.45m	28	18	£7,078	£0.13m	0	0	£0.00m	890	£1.57m
	Retail Services	8				£0.00m								1115	
	Vacant	4				£0.00m								329	
	ALL RETAIL GOODS AND SERVICES	20												2334	
				£1.45m		£0.13m						£0.00m			
ZONE 23															
Convenience		4	326	212	£2,998	£0.63m									£0.63m
Comparison	RW Units (Denmore)	9					0	0		£0.00m	19822	14866	£1,809	£26.89m	£26.89m
	Site 4 Denmore (implement by 2017)	4	4560	2736	£13,992	£38.28m	2280	1368	£6,936	£9.49m	-7577	-5740	£1,809	£10.38	£37.39m
	Dunford	14	392	255	£4,997	£1.27m	116	77	£5,202	£0.40m				332	£1.67m
	Total Floorspace (Retail Goods)	13	326	212	£0.63m	£0.63m	0	0	£0.00m	£0.00m	19822	14866	£1,809	£20,148	£66.59m
	Retail Services	4				£0.00m								452	
	Vacant	1				£0.00m								1598	
	ALL RETAIL GOODS AND SERVICES	18												22199	
				£40.19m		£9.89m						£16.51m			
ZONE 24N Dyce															
Convenience	ASDA	1	4687	2578	£14,960	£38.56m	2982	1640	£11,978	£19.65m	852	469	£9,842	£4.61m	£62.82m
	Other Convenience	1	92	60	£3,206	£0.19m									£0.19m
	Total Convenience	2	4779	2637	£18,166	£38.75m	2982	1640	£11,978	£19.65m	852	469	£9,842	£4.61m	£63.01m
Comparison	Other Comparison	5					803	522	£5,989	£3.13m	92	60	£3,515	£0.21m	£3.34m
	Total Floorspace (Retail Goods)	7	4778	2637	£38.75m	£38.75m	3786	2162	£17,967	£22.77m	944	528	£13,357	£4.82m	£66.35m
	Retail Services	4				£0.00m								373	
	Vacant	4				£0.00m								387	
	ALL RETAIL GOODS AND SERVICES	15												10268	
				£38.75m		£22.77m						£4.68m			
ZONE 24N Remainder															
Convenience	Total Convenience	3	854	555	£2,931	£1.63m									£1.63m
Comparison	Total Comparison	1					67	43	£5,585	£0.24m	0	0	£0.00m	67	£0.24m
	Total Floorspace (Retail Goods)	4	854	555	£1.63m	£1.63m	67	43	£5,585	£0.24m	0	0	£0.00m	920	£1.87m
	Retail Services	10				£0.00m								702	
	Vacant	4				£0.00m								0	
	ALL RETAIL GOODS AND SERVICES	18												1622	
				£1.63m		£0.24m						£0.24m			
Zone 24S															
Convenience	Lidl	1	967	725	£5,662	£4.11m	171	128	£9,888	£1.27m					£5.37m
	Other Convenience	11	2221	1443	£4,247	£6.13m									£6.13m
	Total Convenience	12	3187	2168	£9,909	£10.24m	171	128	£9,888	£1.27m					£11.50m
Comparison	Total Comparison	4					255	165	£7,416	£1.23m	66	43	£6,075	£0.26m	£1.49m
	Total Floorspace (Retail Goods)	16	3187	2168	£10.24m	£10.24m	425	293	£14,832	£2.49m	66	43	£6,075	£0.26m	£12.99m
	Retail Services	15				£0.00m								1306	
	Vacant	3				£0.00m								402	
	ALL RETAIL GOODS AND SERVICES	46												5387	
				£10.24m		£2.49m						£0.26m			
ZONE 25 Middleton Park															
Convenience	ASDA	1	3597	1979	£14,104	£27.91m	1285	707	£8,269	£5.84m	257	141	£8,400	£1.19m	£34.94m
Comparison	Total Comparison	0													
	Total Floorspace (Retail Goods)	1	3597	1979	£27.91m	£27.91m	1285	707	£8,269	£5.84m	257	141	£8,400	£1.19m	£34.94m
	Retail Services	6				£0.00m								648	
	Vacant	0				£0.00m								0	
	ALL RETAIL GOODS AND SERVICES	7												5787	
				£27.91m		£5.84m						£1.19m			
Danestone Zone 25															
Convenience	Tesco	1	6657	4327	£13,142	£56.87m	5326	3462	£11,834	£40.97m	1331	865	£7,236	£6.26m	£104.10m
	Other Conv	1	113	74	£3,286	£0.24m									£0.24m
	Total Convenience	2	6770	4401	£16,428	£57.11m	5326	3462	£11,834	£40.97m	1331	865	£7,236	£6.26m	£104.34m
Comparison	Total Comparison	1					43	28	£5,917	£0.16m					£0.16m
	Total Floorspace (Retail Goods)	1	6771	4401	£57.11m	£57.11m	5369	3490	£17,751	£41.13m	1331	865	£7,236	£6.26m	£104.51m
	Retail Services	5				£0.00m								449	
	Vacant	0				£0.00m								0	
	ALL RETAIL GOODS AND SERVICES	6												13919	
				£57.11m		£41.13m						£6.26m			
Other Zone 25															
Convenience	Total Convenience	6	1057	687	£5,548	£3.81m									£3.81m
Comparison	Total Comparison	2					167	108	£9,780	£1.06m					£1.06m
	Total Floorspace (Retail Goods)	8	1057	687	£3.81m	£3.81m	167	108	£9,780	£1.06m	0	0	£0.00m	1065	£4.87m
	Retail Services	9				£0.00m								1065	
	Vacant	1				£0.00m								94	
	ALL RETAIL GOODS AND SERVICES	18												2382	
				£3.81m		£1.06m						£0.00m			
ZONE 26 Kittybrewster															
Convenience	Total Convenience	0													
Comparison	Major Units	12					3697	2773	£6,163	£17.09m	12374	7114	£3,808	£27.09m	£44.18m
	Total Floorspace (Retail Goods)	12	0	0	£0.00m	£0.00m	3697	2773	£6,163	£17.09m	12374	7114	£3,808	£27.09m	£44.18m
	Retail Services	0				£0.00m								0	
	Vacant	1				£0.00m								973	
	ALL RETAIL GOODS AND SERVICES	13												17044	
				£0.00m		£17.09m						£2			

TABLE 21A: FUTURE FLOORSPACE AND TURNOVER - 2027

All monetary values in 2011 prices

	No.	Convenience		Turnover Rate £/Sq M	Total Turnover £m	General Comparison		Turnover Rate £/Sq M	Total Turnover £m	Bulk Goods		Turnover Rate £/Sq M	Total Turnover £m	All Goods		Turnover Rate £/Sq M	Total Turnover £m	
		GFA Sq M	NFA Sq M			GFA Sq M	NFA Sq M			GFA Sq M	NFA Sq M			GFA Sq M	NFA Sq M			
ZONE 27																		
Remainder Zone 27																		
Convenience	25	3310	2151	£1,917	£4.12m													
Comparison	39					3275	2128	£3,865	£8.23m	4813	3129	£1,243	£3.89m	3310	2151		£4.12m	
Total Floorspace (Retail Goods)	64	3310	2151		£4.12m	3275	2128		£8.23m	4813	3129		£3.89m	11397	7408		£16.24m	
Retail Services	40				£0.00m				£0.00m				£0.00m	2532				
Vacant	12													1242				
ALL RETAIL GOODS AND SERVICES	116				£4.12m				£8.23m				£3.89m	15171				
ZONE 28																		
Mastrick																		
Convenience	8	1154	750	£5,041	£3.78m									1154	750		£3.78m	
Comparison	4					882	573	£5,689	£3.26m	159	103	£4,521	£0.47m	1040	676		£3.73m	
Total Floorspace (Retail Goods)	12	1154	750		£3.78m	882	573		£3.26m	159	103		£0.47m	2194	1426		£7.51m	
Retail Services	11				£0.00m				£0.00m				£0.00m	1525				
Vacant	1													72				
ALL RETAIL GOODS AND SERVICES	24				£3.78m				£3.26m				£0.47m	3791				
Zone 28 Remainder																		
Convenience	17	3880	2522	£2,321	£5.85m									3880	2522		£5.85m	
Comparison	17					257	167	£257	£0.04m	0	0		£0.00m	257	167		£0.04m	
Total Floorspace (Retail Goods)	20	3880	2522		£5.85m	257	167		£1.09m	3250	2438		£6.29m	6500	4975		£7.34m	
Retail Services	29				£0.00m				£0.00m				£0.00m	7396	5126		£13.23m	
Vacant	2													2020				
ALL RETAIL GOODS AND SERVICES	51				£5.85m				£1.09m				£6.29m	9595				
ZONE 29N																		
Convenience	1	3917	2546	£14,441	£36.77m									6529	4244		£55.52m	
Comparison	1					2285	1485	£11,580	£17.20m	326	212	£7,306	£1.55m	1088				
Total Floorspace (Retail Goods)	17	6880	4564		£43.73m	3895	2623		£22.72m	1286	836		£4.28m	12061	7208		£67.06m	
Retail Services	3				£0.00m				£0.00m				£0.00m	2607				
Vacant	3													322				
ALL RETAIL GOODS AND SERVICES	60				£43.73m				£22.72m				£4.28m	14991				
ZONE 29S Garthdee																		
Convenience	1	5686	3127	£18,125	£56.69m									14216	7819		£84.52m	
Comparison	1					6397	3518	£6,163	£21.68m	2132	1173	£5,242	£6.15m	7464	4478		£59.53m	
Total Floorspace (Retail Goods)	2	10164	5814		£105.39m	9009	5086		£31.34m	2506	1397		£7.32m	21679	12297		£144.05m	
Retail Services	0				£0.00m				£0.00m				£0.00m	13213	9910		£29.18m	
Vacant	0													0				
ALL RETAIL GOODS AND SERVICES	5	10164	5814		£105.39m	10617	6291		£37.71m	14111	10101		£30.14m	34992	22207		£173.23m	
ZONE 29S Cults																		
Convenience	3	756	492	£4,656	£2.29m									756	492		£2.29m	
Comparison	14					2175	1414	£3,978	£5.62m	48	31	£5,534	£0.17m	2223	1445		£5.80m	
Total Floorspace (Retail Goods)	14	756	492		£2.29m	2175	1414		£5.62m	48	31		£0.17m	2979	1936		£8.09m	
Retail Services	15				£0.00m				£0.00m				£0.00m	1406				
Vacant	2													401				
ALL RETAIL GOODS AND SERVICES	31				£2.29m				£5.62m				£0.17m	4786				
Remainder Zone 29S																		
Convenience	13	2118	1377	£3,116	£4.29m									2118	1377		£4.29m	
Comparison	14					1449	942	£4,267	£4.02m	211	137	£3,731	£0.51m	1660	1079		£4.53m	
Total Floorspace (Retail Goods)	27	2118	1377		£4.29m	1449	942		£4.02m	211	137		£0.51m	3778	2456		£8.82m	
Retail Services	24				£0.00m				£0.00m				£0.00m	1946				
Vacant	3													117				
ALL RETAIL GOODS AND SERVICES	54				£4.29m				£4.02m				£0.51m	5840				
ZONE 30 Torry																		
Convenience	9	1410	916	£3,270	£3.00m									1410	916		£3.00m	
Comparison	14					1135	737	£4,336	£3.20m	301	196	£2,743	£0.54m	1436	933		£3.73m	
Total Floorspace (Retail Goods)	14	1410	916		£3.00m	1135	737		£3.20m	301	196		£0.54m	2846	1850		£6.73m	
Retail Services	32				£0.00m				£0.00m				£0.00m	2325				
Vacant	6													361				
ALL RETAIL GOODS AND SERVICES	52				£3.00m				£3.20m				£0.54m	5592				
ZONE 30 Beach Boulevard RP																		
Convenience	1	5019	2781	£13,416	£37.04m									9126	5019		£54.44m	
Comparison	1					3184	1757	£7,890	£13.86m	913	502	£7,071	£3.55m	1454				
Total Floorspace (Retail Goods)	11	7175	4253		£43.53m	7325	4833		£31.20m	8144	5925		£17.24m	22644	13378		£84.68m	
Retail Services	0				£0.00m				£0.00m				£0.00m	0				
Vacant	0													0				
ALL RETAIL GOODS AND SERVICES	11				£43.53m				£31.20m				£17.24m	22644				
ZONE 30 Remainder																		
Convenience	34	4644	3019	£2,234	£6.74m									4644	3019		£6.74m	
Comparison	34					3310	2151	£4,161	£8.95m	2483	1614	£2,330	£3.76m	10437	3765		£12.71m	
Total Floorspace (Retail Goods)	68	4644	3019		£6.74m	3310	2151		£8.95m	2483	1614		£3.76m	15081	6784		£19.46m	
Retail Services	78				£0.00m				£0.00m				£0.00m	8916				
Vacant	7													4598				
ALL RETAIL GOODS AND SERVICES	153				£6.74m				£8.95m				£3.76m	28595				
ZONE 31 Portlethen																		
Convenience	1	5684	3126	£12,144	£37.97m									9473	5210		£58.51m	
Comparison	2					2368	1303	£9,791	£12.75m	2487	1368	£5,695	£7.79m	493	321		£0.97m	
Total Floorspace (Retail Goods)	10	6177	3447		£38.94m	7375	5033		£38.39m	9078	6301		£19.10m	11597	8664		£36.95m	
Retail Services	13				£0.00m				£0.00m				£0.00m	2153	14194		£96.43m	
Vacant	1													70				
ALL RETAIL GOODS AND SERVICES	24				£38.94m				£38.39m				£19.10m	22956				
ZONE 32																		
Convenience	1	2435	1582	£4,219	£6.88m									2705	1758		£8.40m	
Comparison	1					165	124	£5,615	£0.89m					1100	825		£1.54m	
Total Floorspace (Retail Goods)	3	4873	3261		£0.88m	436	300		£2.42m	63	41		£0.24m	1504	977		£10.83m	
Retail Services	7				£0.00m				£0.00m				£0.00m	343	223		£0.89m	
Vacant	3													134	87		£0.24m	
Total Floorspace (Retail Goods)	10	4313	2588		£4.219m	1150	690		£8.26m	288	173		£0.13m	5751	3451		£17.83m	
Retail Services	10				£0.00m				£0.00m									