



ABERDEEN
CITY COUNCIL

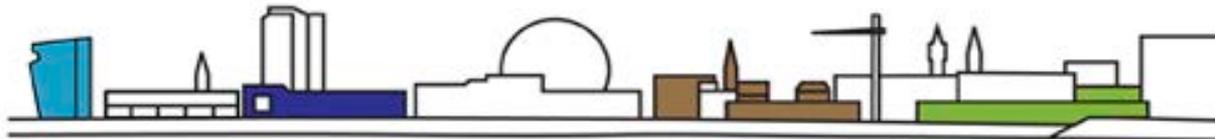
Aberdeen Local Development Plan Review

Main Issues Report – Retail and City Centre Presentation and Workshop

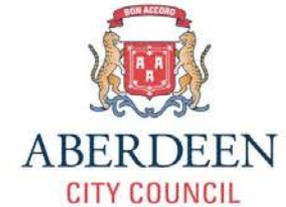


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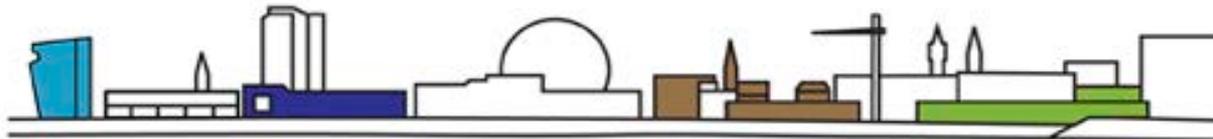
- **Introduction to the Main Issues Report**
- **Aberdeen City and Aberdeenshire Retail Study 2013 (presentation by Keith Hargest)**
- **Retail and City Centre Workshop**



Introduction to the Main Issues Report

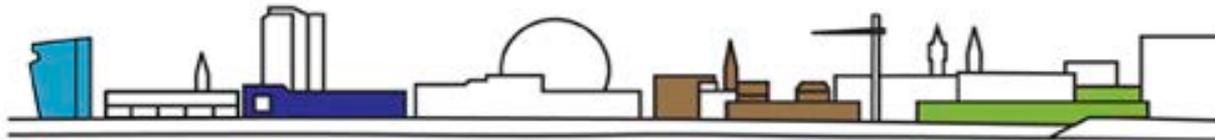


- Main Issues Report (MIR) approved by Enterprise, Strategic Planning and Infrastructure on 12 November 2013
- MIR is the first stage in producing a revised and updated Local Development Plan for Aberdeen which, when adopted, will replace the Aberdeen Local Development Plan 2012.
- The role of the MIR is to stimulate debate on the main planning issues facing Aberdeen and to suggest possible options for dealing with these.
- Consultation on the MIR runs from 13 January to 24 March 2014
- Comments given today will feed into the preparation of a Proposed Aberdeen Local Development Plan, due to go in front of Councillors late 2014



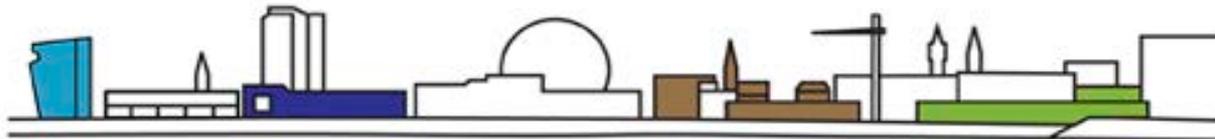
Main Issues Report

- **The Main Issues Report includes 13 Main Issues and 21 additional Questions.**
- **Four ‘Main Issues’ are specific to Retail in the City Centre**
- **Other ‘Main Issues’ in the Report include the proposed Aberdeen Harbour Expansion, Housing Needs and Climate Change**



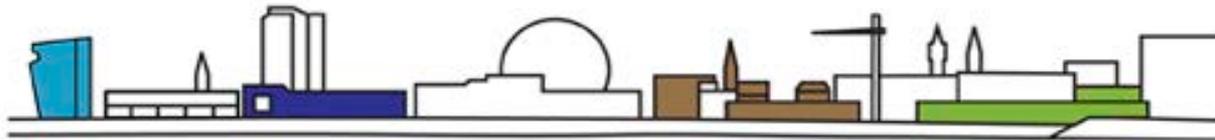
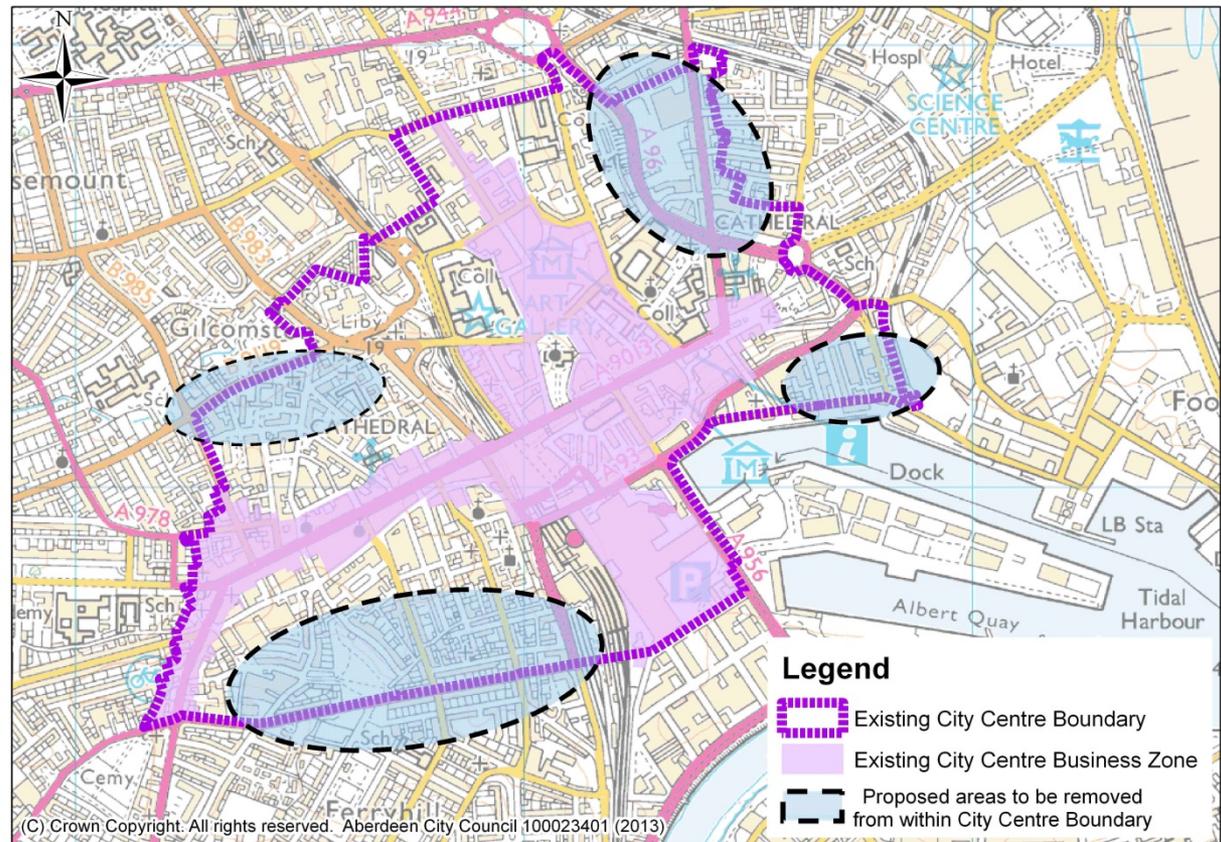
Main Issue - City Centre Vision

- **“What do you want your City Centre to be like by 2035 and how should it be used?”**
- Propose that a new Aberdeen City Centre Vision and Masterplan should address five main themes:
 - Urban Design
 - Cultural Vision
 - Union Street
 - North South Access
 - Links to the Sea
- Would like to develop the Vision and Masterplan and adopt it as Supplementary Guidance to the new Aberdeen Local Development Plan.



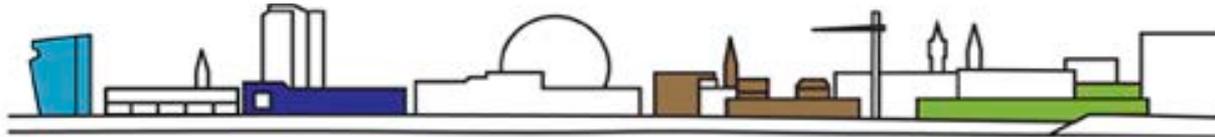
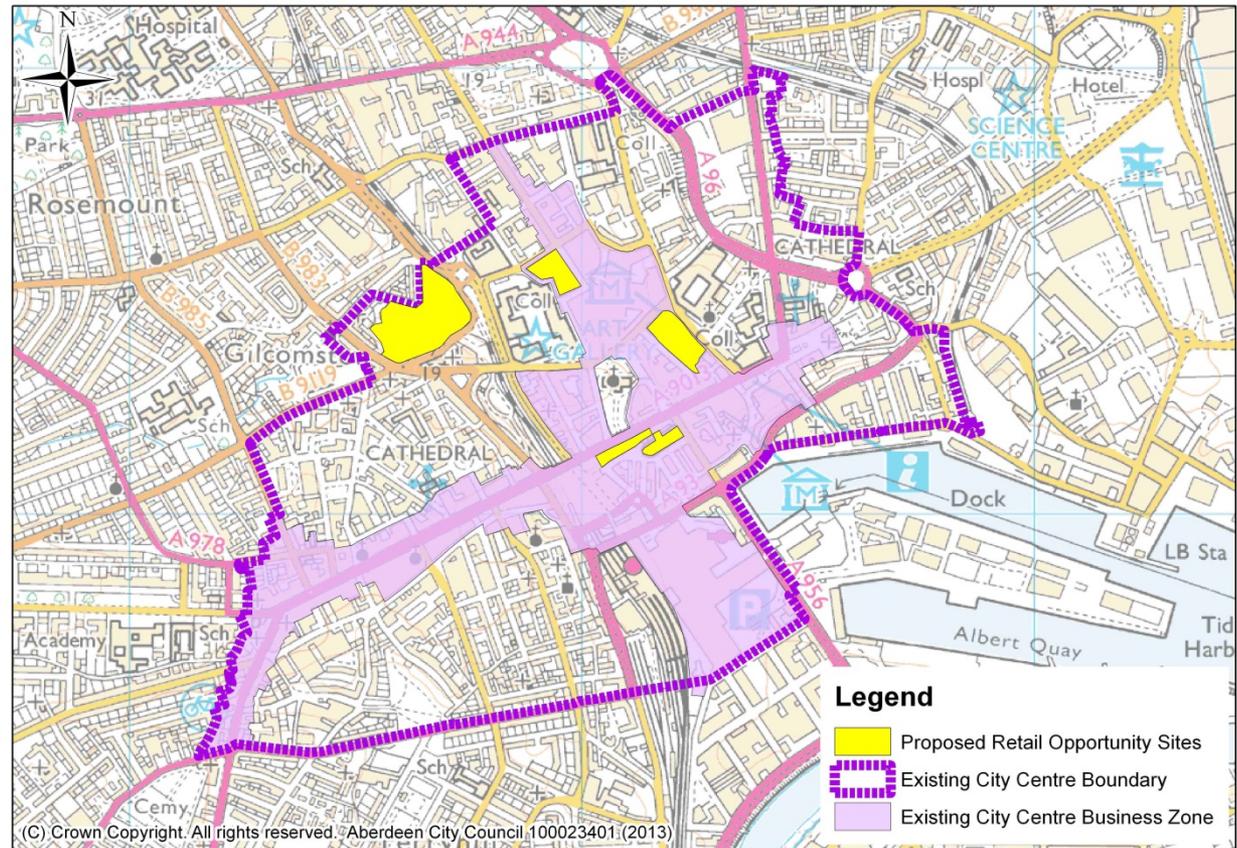
Question - Review of City Centre Boundaries

- “What do you think is important to include within the City Centre boundary and why?”
- A review of the City Centre / City Centre Business Zone boundary is proposed – review would provide a more focused vision for the City Centre



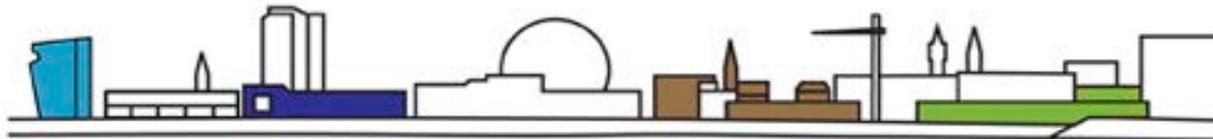
Main Issue - Retail Strategy for the City Centre

- 30,000-35,000 sq. m. of new retail floorspace required by 2022
- Approx. the size of floorspace offered on the ground floor of Union Square
- No site large enough in the City Centre



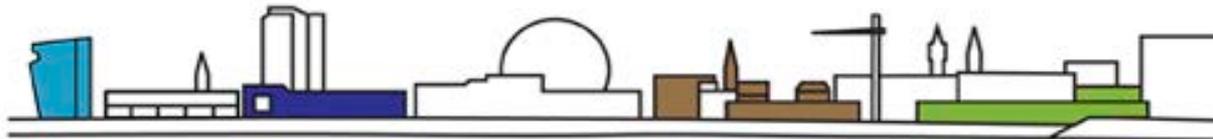
Opportunities for Retail Development

Site	Size - Gross Floor Area (m ²) approx.	Implications
Aberdeen Market	Existing retail offering 12,500 Additional gross floor area 5,500	<ul style="list-style-type: none"> Qualitative retail improvement. Opportunity to address accessibility issues from the Green to Union Street. Opportunity to address public realm issues.
Upper / Basement Floors, 73-149 Union Street	Existing retail offering 8,000 Additional gross floor area 2,600	<ul style="list-style-type: none"> Brings back upper and basement floor use. May lose some retail floorspace through redevelopment. Listed building constraints.
St Nicholas House	<2,000	<ul style="list-style-type: none"> Opportunity to address accessibility issues through St Nicholas Centre. Opportunity to address public realm issues. Council already has committed scheme for a mixed use development for the St Nicholas House site. Listed building constraint – Provost Skene’s House.
George Street / Crooked Lane	6,000	<ul style="list-style-type: none"> Opportunity to enhance George Street and link to John Lewis / extend Bon Accord Centre. Opportunity to address accessibility issues through Bon Accord Centre. Opportunity to address public realm issues. May lose some retail floorspace through redevelopment. Listed building constraints.
Denburn / Woolmanhill – long term major retail development	Approx. 20,000	<ul style="list-style-type: none"> Opportunity to enhance accessibility through the Denburn Valley. Listed building constraints. Flooding issues. Planning Brief for the site.



Main Issues - Union Street Frontages

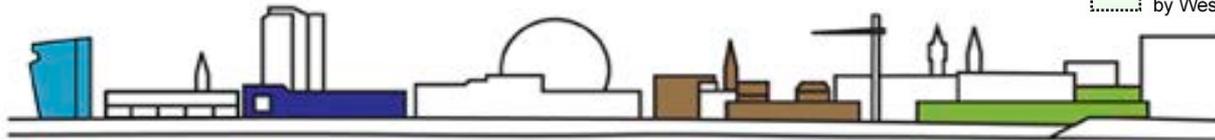
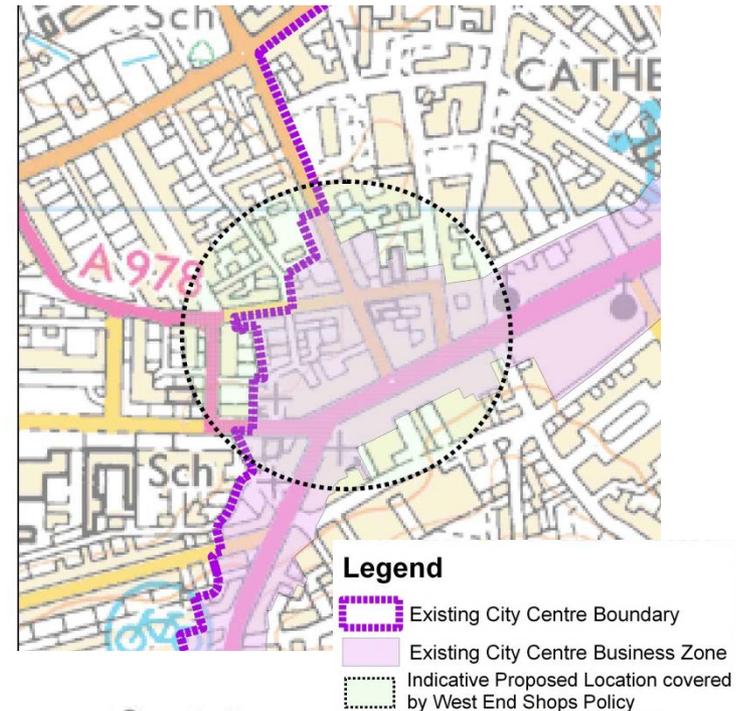
- **“Should there be a minimum level of retail frontage on Union Street or are other uses acceptable?”**
- Union Street plays a prominent and wide-ranging role in the City and has a major role in the City’s retail function
- Current policy seeks to enhance the vitality and viability by encouraging retail. Applications for Change of Use are assessed against this policy.
- Draft Scottish Planning Policy has introduced the ‘Town Centre First’ policy
- Propose to encourage a greater mix of uses to the west end of Union Street – therefore relax the current policy



Main Issues – West End Shops and Cafes

“Should the West End shops and cafes be protected? If so, how?”

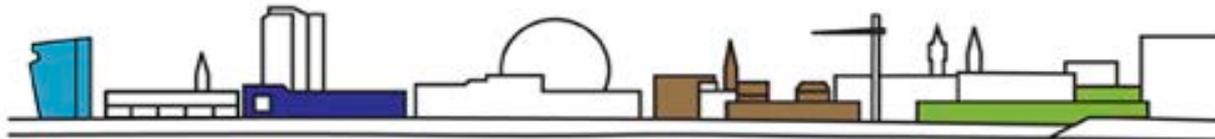
- Recognise that there is a strong level of retail in this area - dominated by independents
- Propose a new policy protecting the retail and café function in this area
- Powers are limited to protect and promote independents, however we can refuse applications that result in the loss of such premises



Aberdeen City and Shire Retail Study 2013



- **Keith Hargest from Hargest Planning Ltd who conducted the study will now give further detail into the findings...**



Aberdeen City and Aberdeenshire Retail Study 2013

Retail and City Centre Presentation and Workshop

January 2014

Hargest Planning Ltd

Structure of Presentation

- Study brief
- Recent and future trends in retailing
- Existing retailing in Aberdeen City Centre: floorspace and turnover.
- Overview of recommended retail strategy
- Implications for Aberdeen City Centre

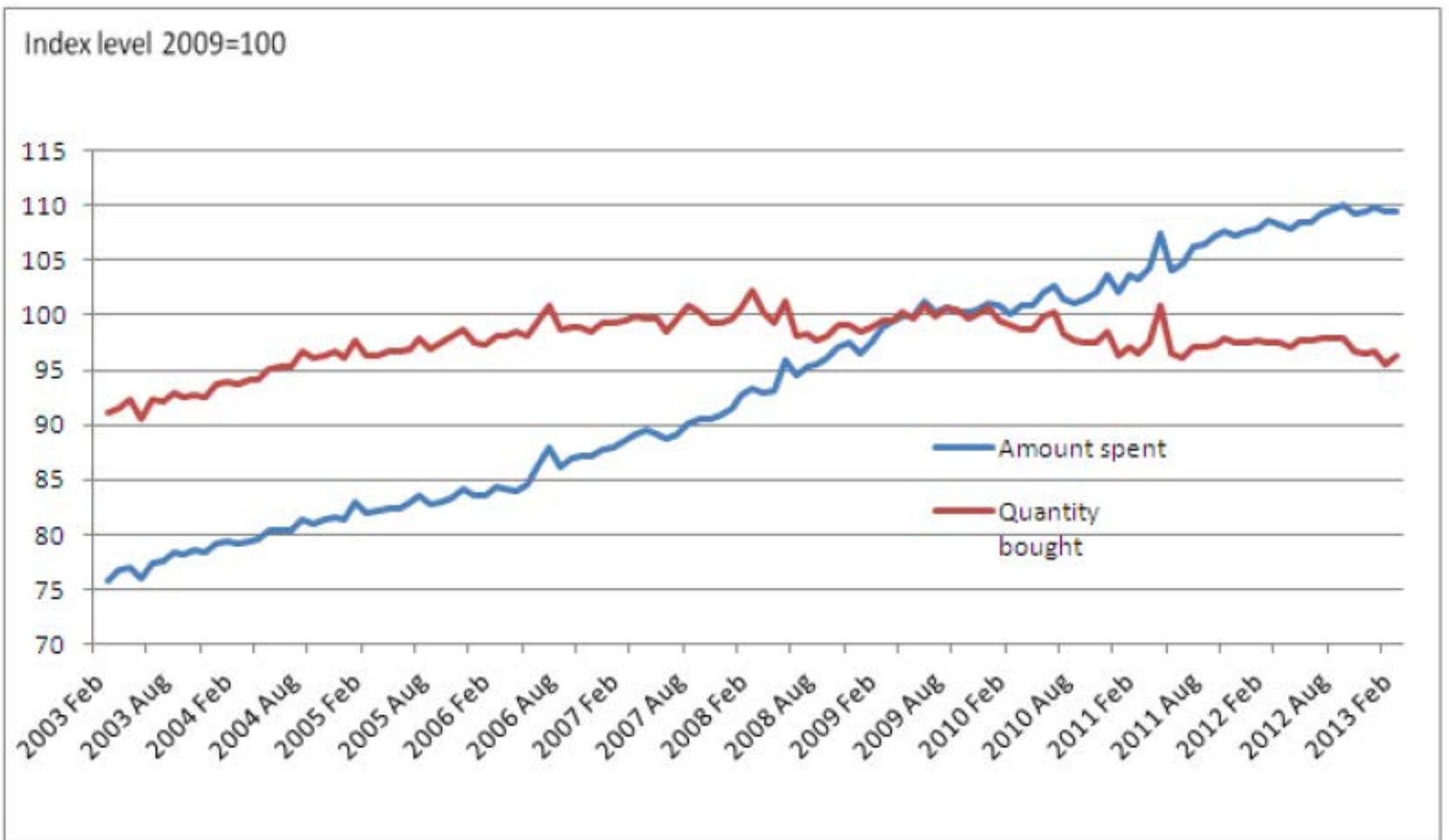
Retail Study Overview

- Using up-to-date data prepare a Strategic Retail Model for the period to 2027.
- Recommendations for a retail strategy - focus on the city and settlements within the AHMA.
- Substantial data inputs:
 - Base data (population, available expenditure etc)
 - Household survey (3000 interviews)
 - Detailed analysis of future trends

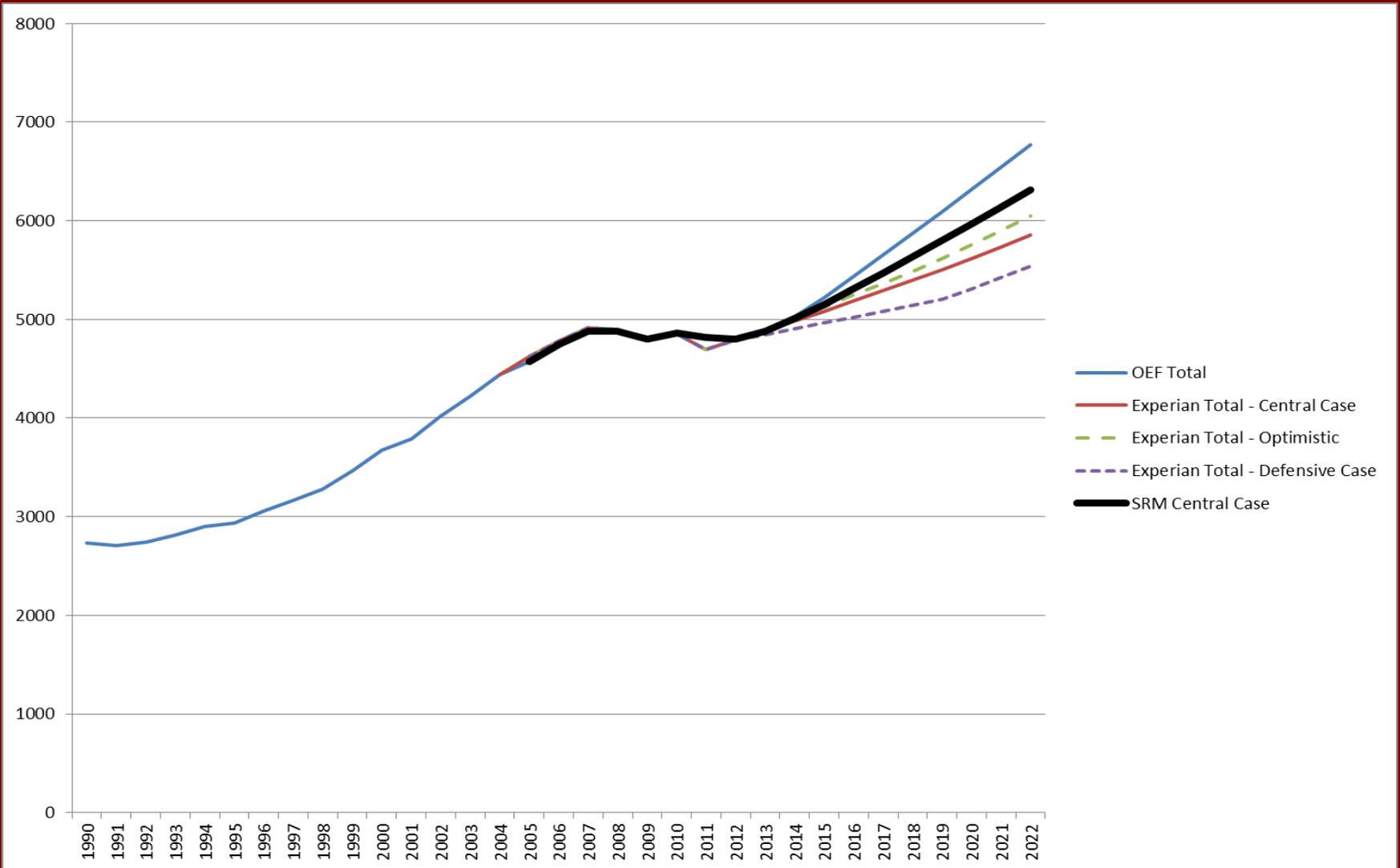
Trends in Retailing: General

- Business fundamentals remain – maximising profit *but* slower growth will increase importance of control over costs
- Long term expenditure growth *will* occur but at lower rates than up to 2008 => slower floorspace expansion
- Increasing competition between retail and other sectors - need for more town centre space to be devoted to non-retail activities
- Continued market concentration: large centres gain, smaller ones lose
- Internet growth will have implications for floorspace

Expenditure Growth

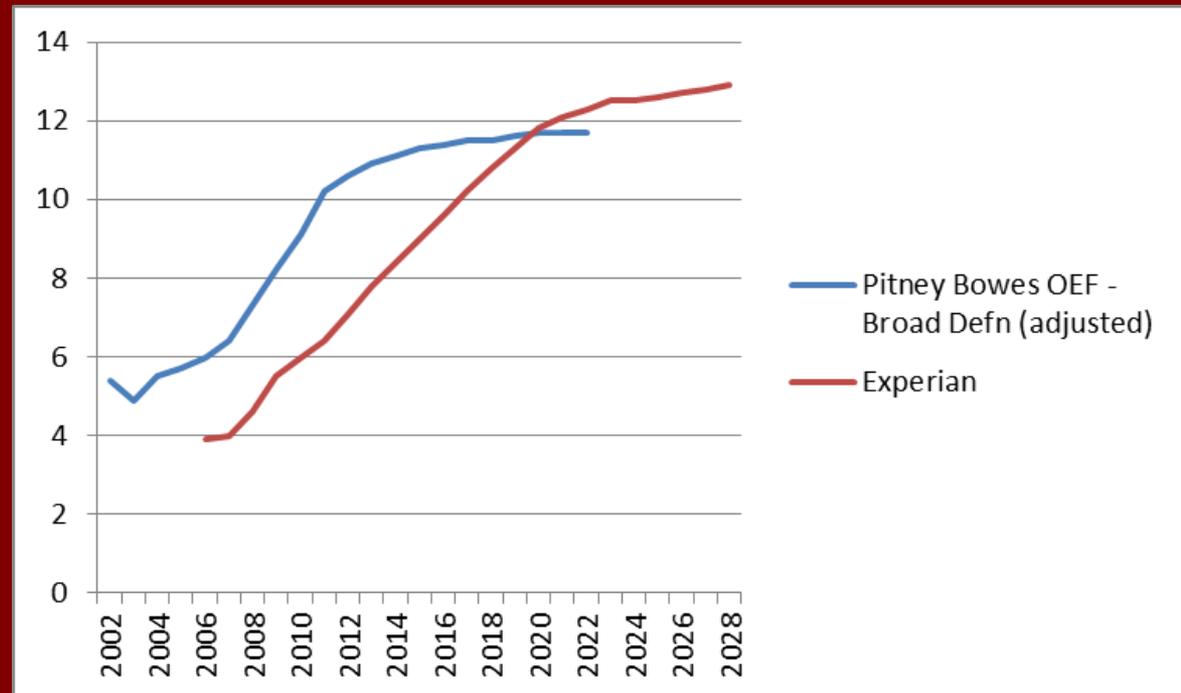


Expenditure Growth Forecasts

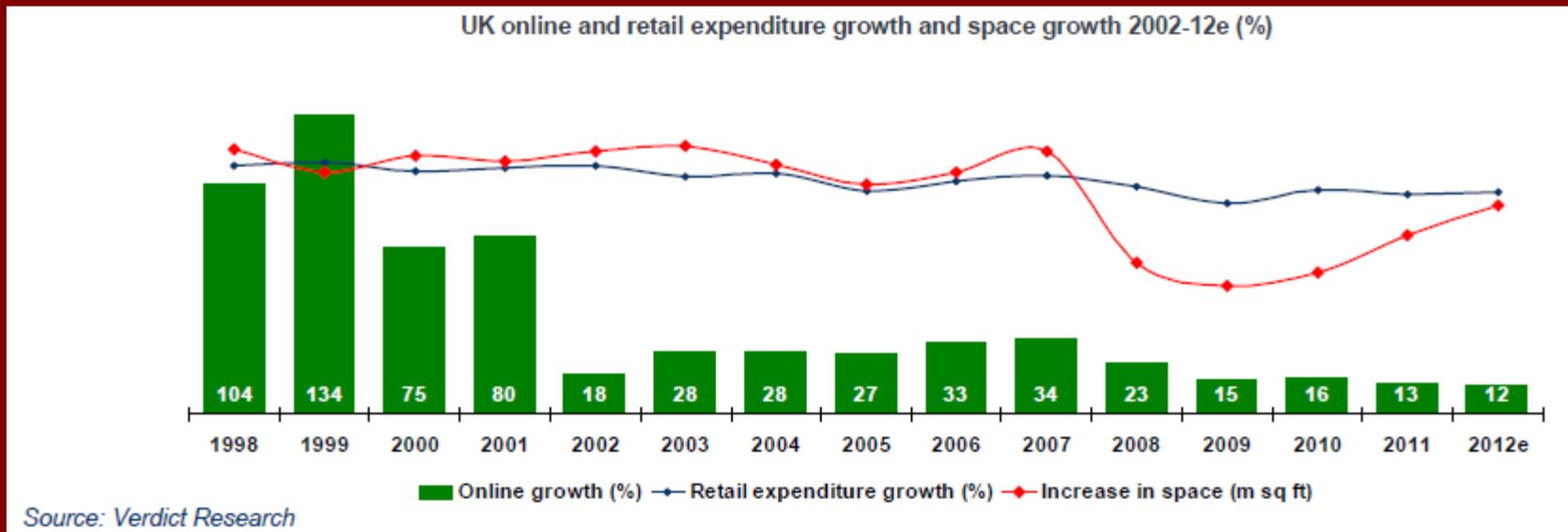


Special Forms of Trading – Internet

- Includes e-retail, m-retail and now s-retail
- A range of special forms of trading – others have declined as internet has grown
- Forecasts:



Internet Trading – Implications for Floorspace



Key Trends

- Expenditure growth – will be significant – especially as a result of *both* population and economic growth in NE and expenditure forecasts
- Internet trading – is forecast to plateau – at that point it will cease to affect floorspace requirements
- Market concentration – greater turnover will be directed to major centres – primarily for comparison goods

Implications for NE Scotland

- Market concentration towards largest centres. Principal winner: Aberdeen CC. Losers: smaller centres; secondary pitches in all centres.
- Centre and satellites – retrenchment by multiples to largest centres – opportunities for locals/independents?
- Overall floorspace growth will moderate *but substantial variation* between locations.
- Need to address requirements of new residential areas with population growth.

Total Retail Goods Floorspace & Turnover

		Convenience		General Comparison		Bulky Goods		Total Goods	
City Centre	460	23522	£83.40m	156429	£698.28m	20833	£60.23m	200785	£841.91m
		11%	9%	46%	60%	13%	25%	28%	35%
Town & District Centres	799	86992	£466.41m	121736	£312.83m	59205	£89.74m	267933	£868.98m
		39%	48%	36%	27%	37%	37%	37%	36%
Neighbourh'd/ Local Rural	638	62418	£139.61m	31307	£57.66m	29625	£28.81m	124002	£226.08m
		28%	14%	9%	5%	19%	12%	17%	9%
Supermarkets / Superstores	22	50949	£289.96m	14785	£48.84m	2610	£6.78m	64406	£345.58m
		23%	30%	4%	4%	2%	3%	9%	15%
Retail Parks	35	0	£0.00m	14681	£45.37m	47789	£53.78m	65757	£99.15m
		0%	0%	4%	4%	30%	22%	9%	4%
TOTAL	1954	223881	£979.39m	338938	£1,162.98m	160062	£239.33m	722882	£2,381.70m
		31%	41%	47%	49%	22%	10%		

Retail Floorspace in NE Scotland - 2013

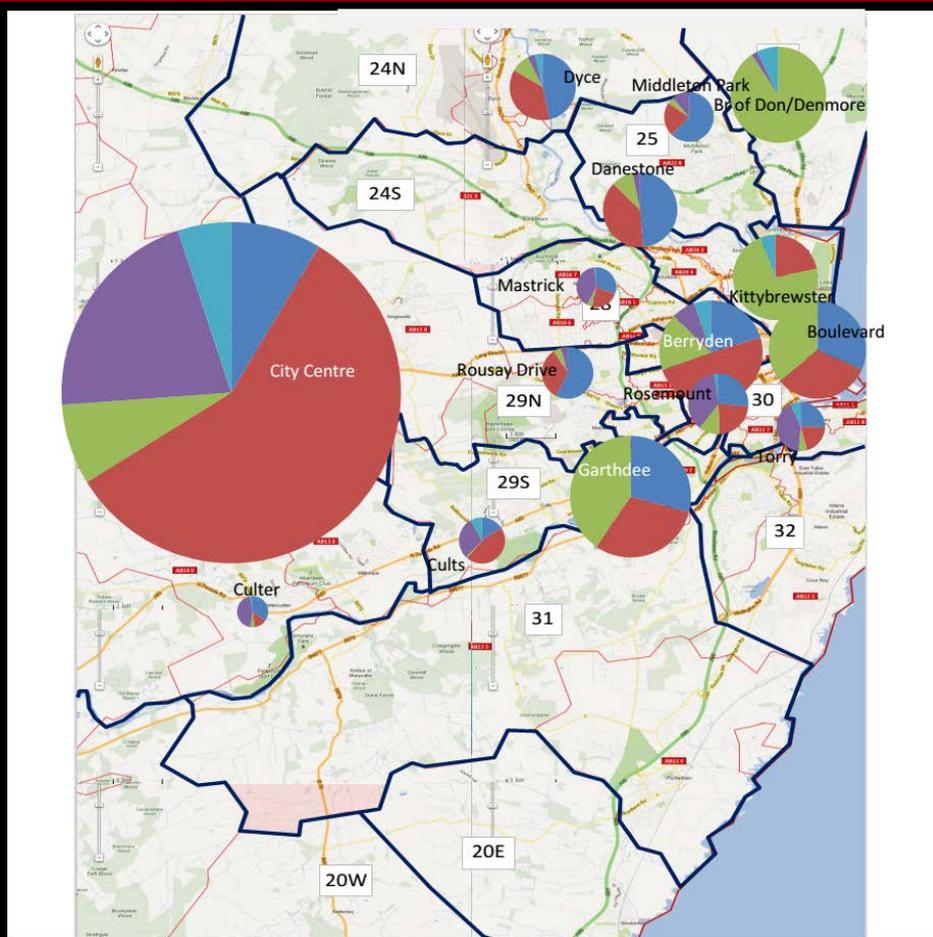


Figure 4.3: Aberdeen City - Retail Floorspace 2013

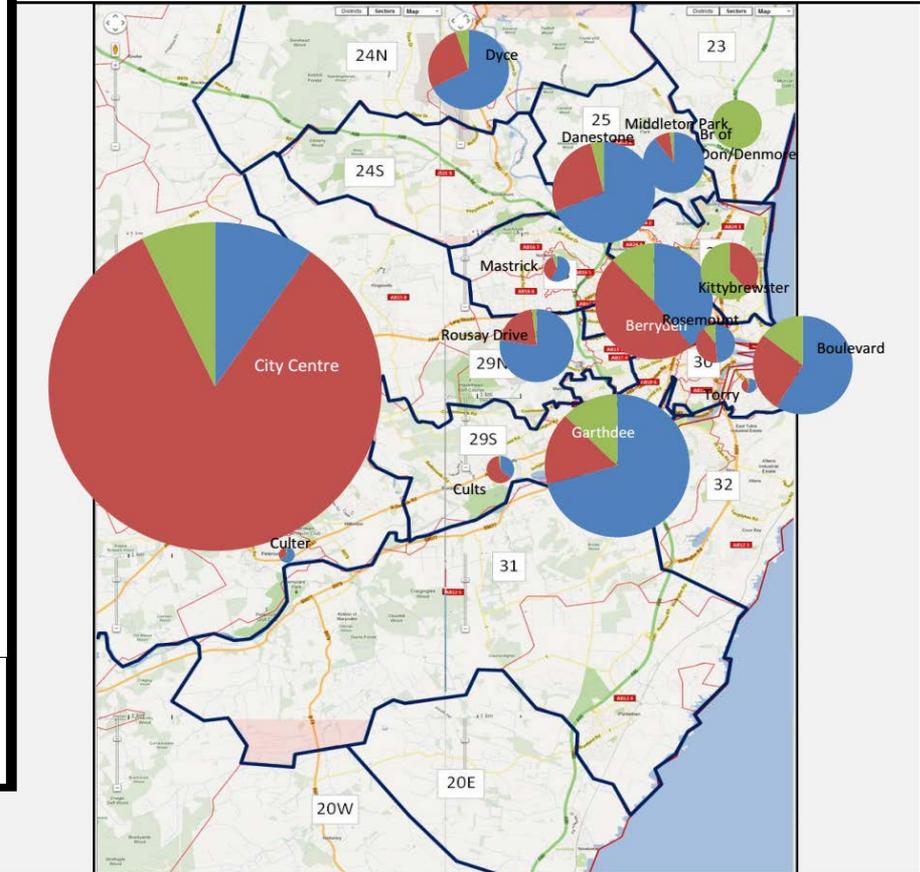


Figure 4.5: Aberdeen City - Retail Turnover 2013



Retail Turnover in NE Scotland - 2013

Retail Floorspace Commitments

- Commitments: Granted pp or allocated sites in LDPs
- Equivalent to 6.5% increase in total floorspace:
 - 14% increase in convenience
 - 4% gen comp
 - 4% bulky goods
 - 42% of all commitments in structure plan area are in Aberdeen City(58% in Aberdeenshire)

Square Metres GFA/NFA	Convenience		General Comparison		Bulky Goods		All Goods	
Aberdeen City	14618	8536	9087	5945	4233	3005	27939	17486

Deficiencies: Comparison Goods

- Principal retail deficiencies/potential: City
 - Substantial growth for new floorspace. *However* overlapping catchments/ease of access – difficult to identify specific locations.
 - Aberdeen City Centre growth: analysis - >60,000 sq m by 2022 (and continues to increase thereafter)

Recommended Retail Dvpt Strategy

- Components of Dvpt Strategy:
 - All retail commitments
 - City Centre: 30,000 sq m GFA + St Nicholas House
 - City: Support for new District Centres serving major expansion

City Centre – Principal Retail Area

Figure 2.2: Retail Goods and Retail Service Units in Aberdeen City Centre

Key:

- Convenience
- General Comparison
- Bulky Goods
- Retail Services
- Vacant

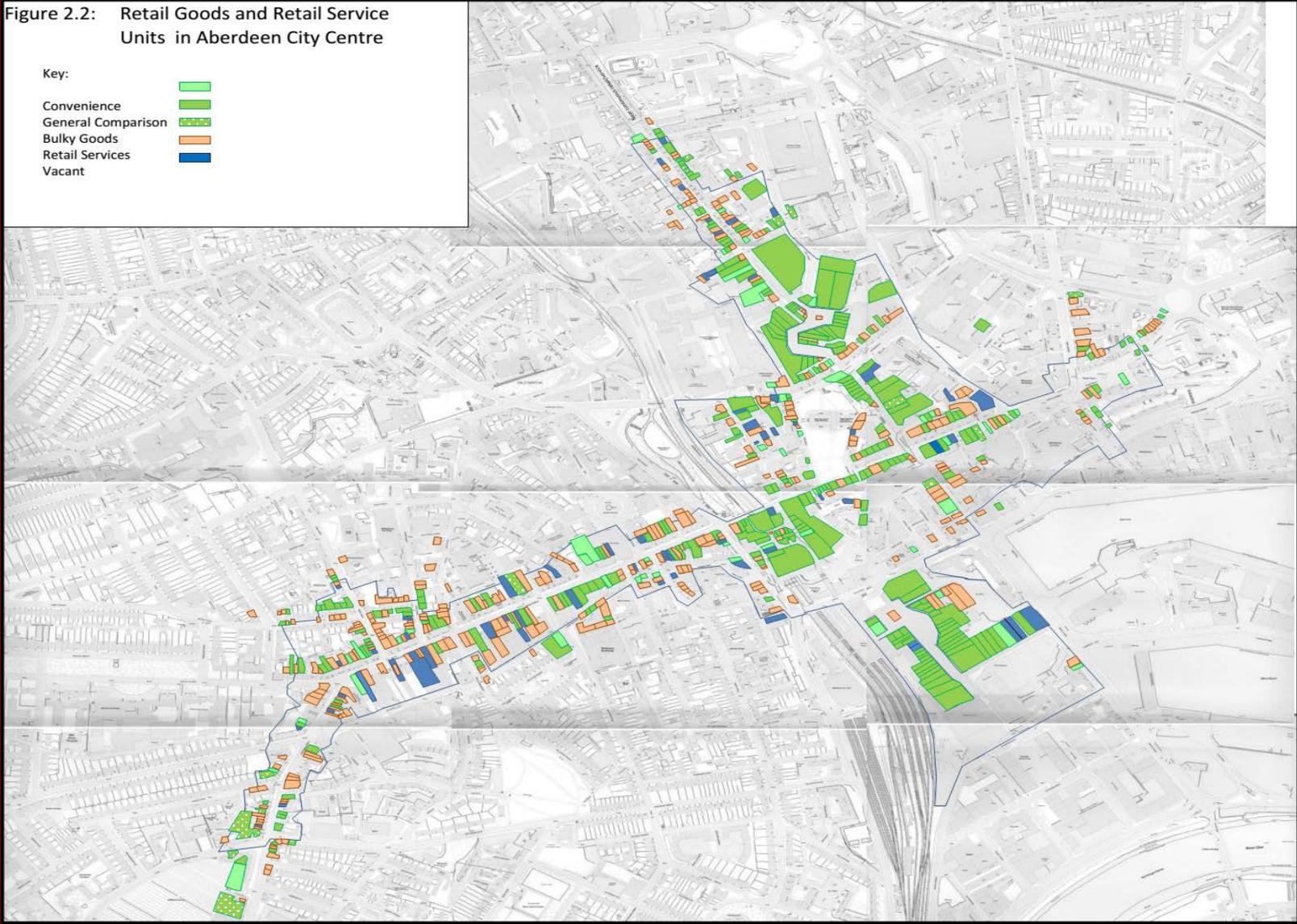


Figure 2.4: Multiple Retailers in Aberdeen City Centre

Key:

National/Regional Multiple Retailer
(Retail goods shops only)

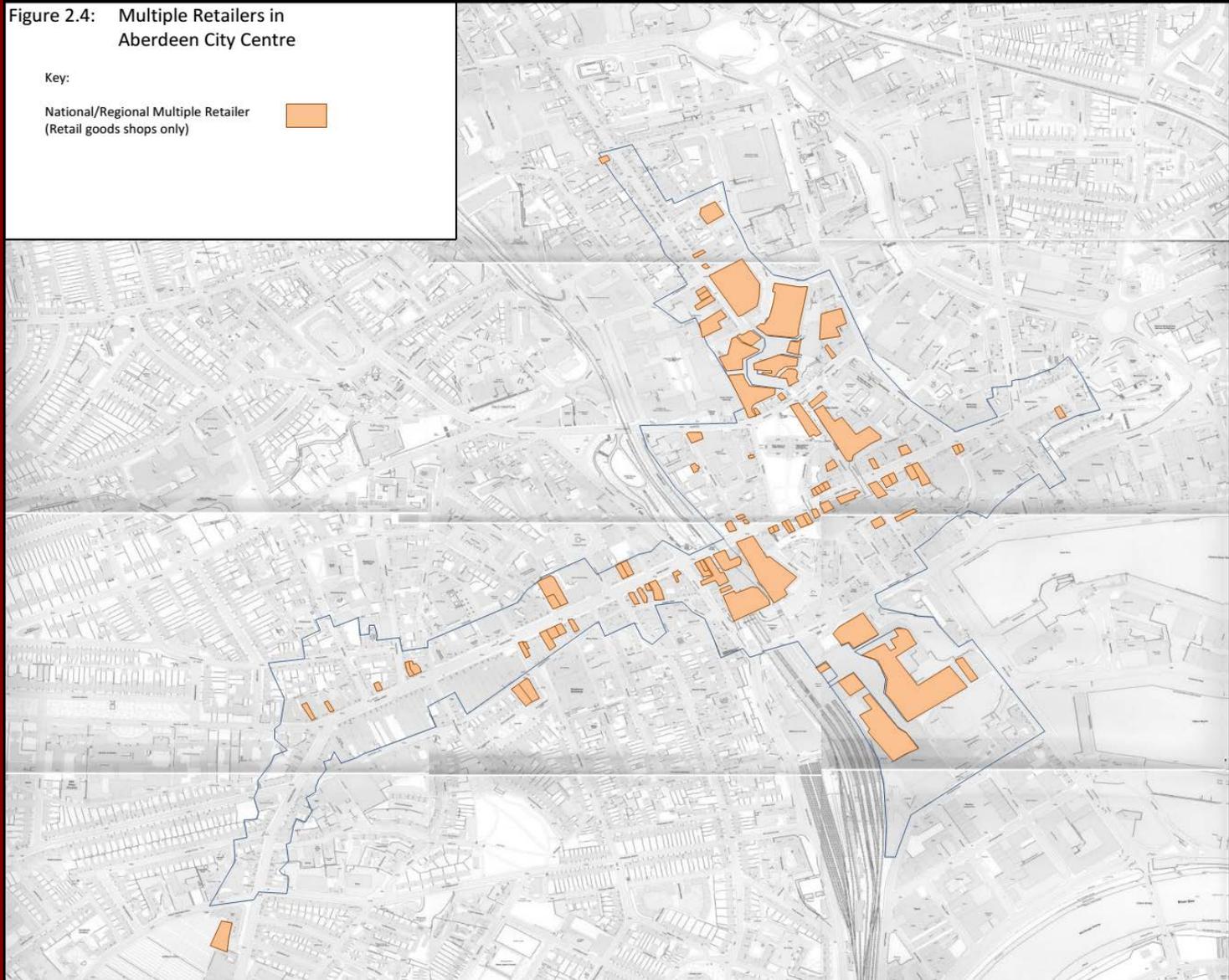


Figure 2.5: Pedestrian Flows in Aberdeen City Centre

Source: SIAS on behalf of Aberdeen City Council

Key:

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

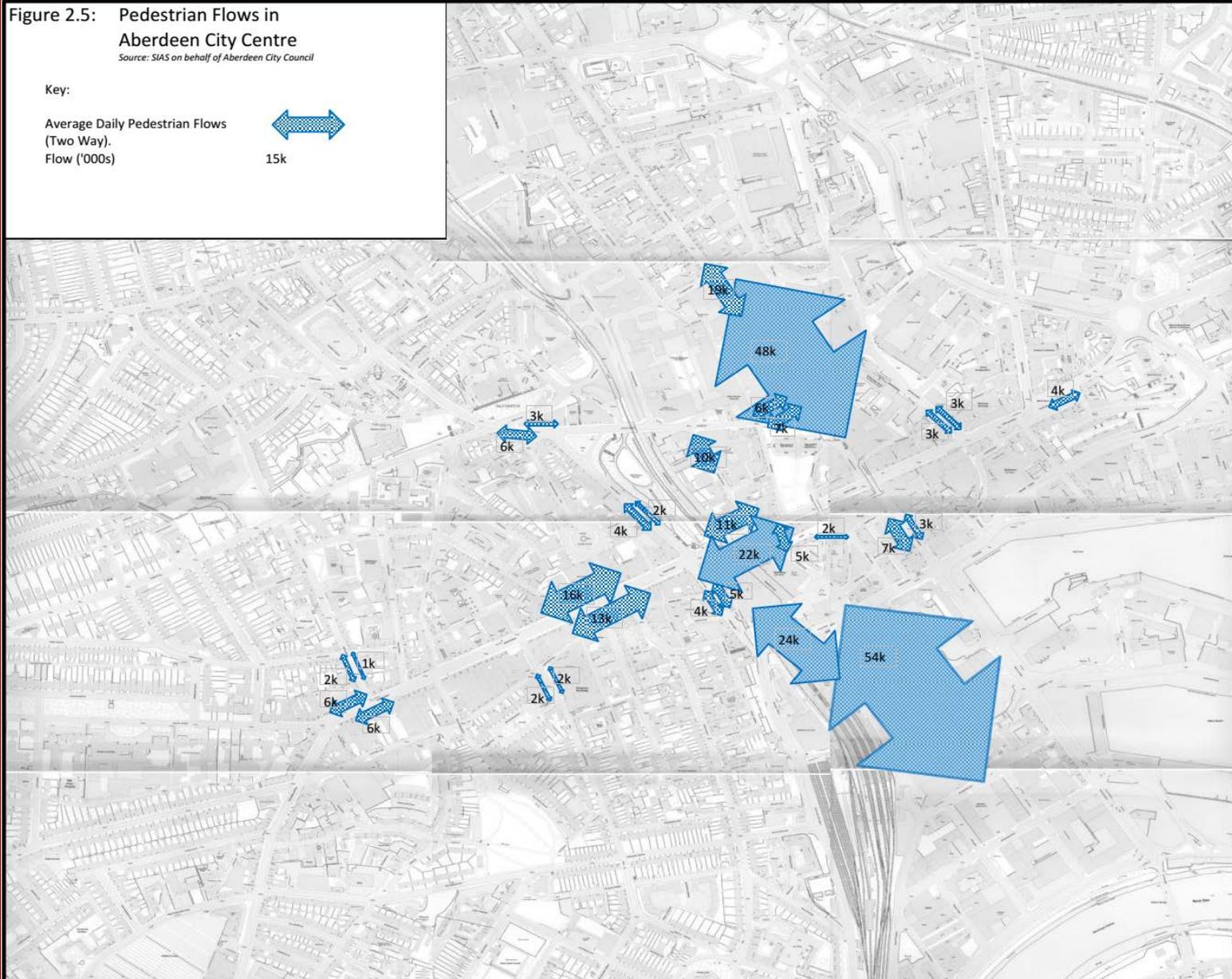
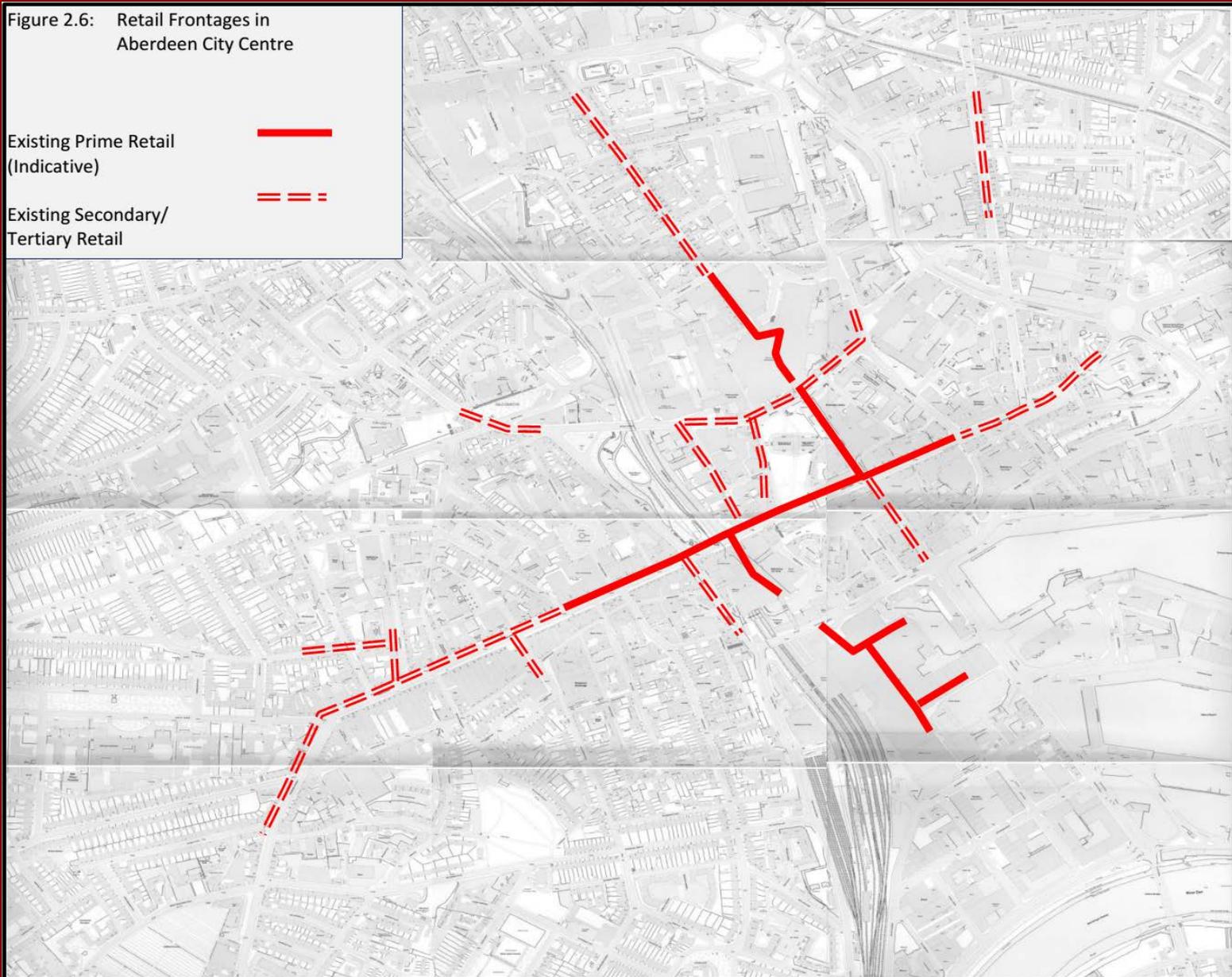


Figure 2.6: Retail Frontages in Aberdeen City Centre

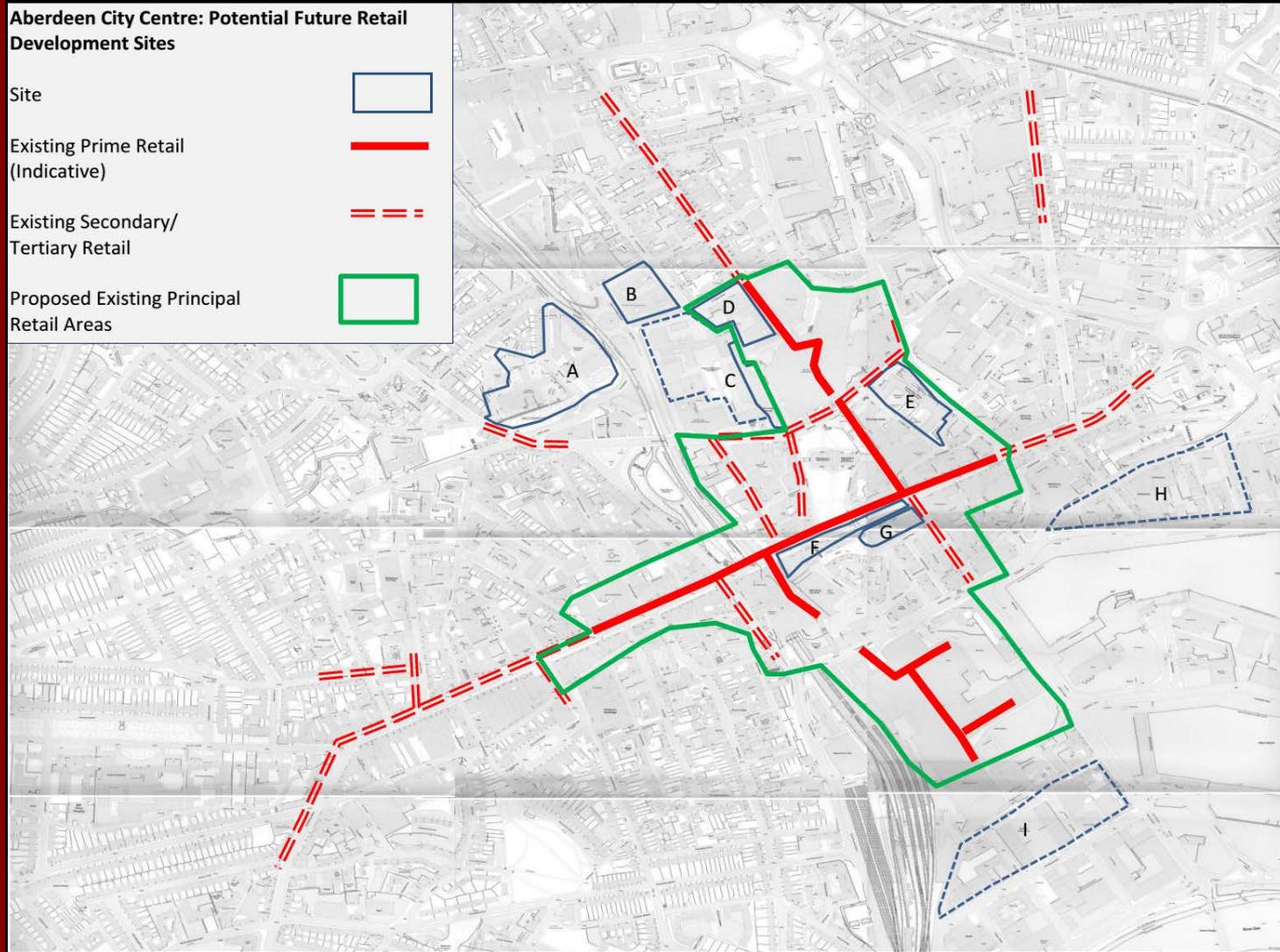
Existing Prime Retail
(Indicative)



Existing Secondary/
Tertiary Retail



City Centre Strategy



Development Strategy for City Centre Floorspace

Major Retail Development Sites

- Site A Denburn/Woolmanhill for major new retail development.
- Monitor position regarding future potential of land at Site C Schoolhill.
- Review 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

Other Aspects of Retail Strategy

- Sequential approach – reflects City LDP
- Principal Retail Area in City Centre
- Management of change for weaker centres
- Retail issues for particular retail sectors
- Monitoring
- Summary for centres

Break into workshops...

- There are a list of questions at your table with maps to help aid the workshop
- If you have any questions please ask the Officer at your table – they will be happy to help!

