

Aberdeen City and  
Aberdeenshire Retail Study

2018 Aberdeen City Update

Final Report

Volume 2: Review of Centres

Aberdeen City Council

May 2019

# **Aberdeen City and Aberdeenshire Retail Study**

## **2018 Aberdeen City Update**

### **Final Report**

#### **Volume 2: Review of Centres**

**May 2019**

**reference:**

Contact: **Keith Hargest**

Tel: **0131 226 1272**

Email: **[keith.hargest@btconnect.com](mailto:keith.hargest@btconnect.com)**

## **Volume 1: Main Report**

## **Volume 2: Review of Centres**

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## **Volume 3: Appendices**

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# 1 Introduction

1.1 This Volume sets out information on each of the principal centres identified within the existing retail hierarchy identified in the 2017 LDP Supplementary Guidance: Hierarchy of Centres. The review includes the following:

- City Centre
- Town Centres – Rosemount and Torry.
- District Centres – Danestone, Dyce, Berryden, Middleton Park and Rousay Drive.
- Neighbourhood Centres – selected centres only: Mastrick, Culter and Cults. In addition, the area close to the junction of the A90 and A96 at Haudegain has been examined to assess whether or not this should be included within the Network of Centres as a Neighbourhood Centre. The Supplementary Guidance identifies a further 27 neighbourhood centres which are not included in this review.
- Commercial Centres – Garthdee, Kittybrewster, Links Road/Boulevard and the Denmore Road area. Lower Berryden is included within the review of Berryden.

1.2 The review of these centres provides information on the following:

- A description of the centre.
- Significant changes in retail, retail service and other services/facilities since 2004.
- A short health check of the centres (vitality and viability).
- Assessment of future prospects, key issues, deficiencies and a review of existing planning policy to establish whether any changes are appropriate for these centres.

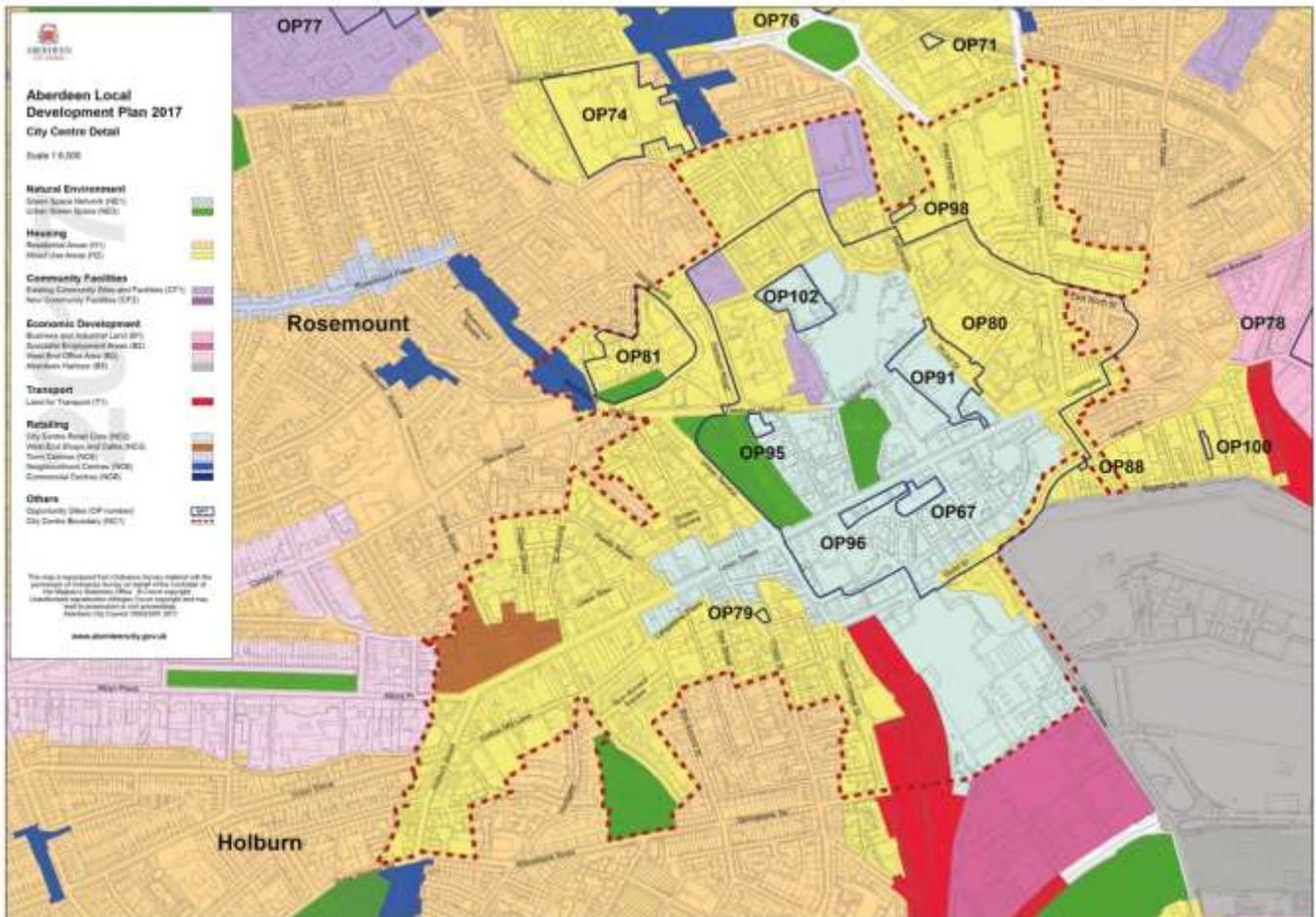
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## 2 Aberdeen City Centre

### Introduction

- 2.1 Aberdeen City Centre remains the principal retail location in the north east of Scotland. Although no new household surveys have been undertaken since the ACARS study was completed in 2013 the scale of new retail provision developed over the past 5 years elsewhere in the north east has been limited with the result that there has been no threat to the overall pre-eminence of the City Centre within the network of centres. The market area served by the City Centre remains the whole of Aberdeen and Aberdeenshire and it also draws trade from significant parts of Moray, Shetland and Angus.
- 2.2 The 2017 LDP Proposals Map identifies three broad designations for development plan policies within the City Centre that are directly relevant to the current study:
- City Centre Retail Core (Policy NC2)
  - Mixed Use Areas (Policy H2)
  - West End Shops & Cafes (Policy NC3)
- 2.3 In addition, part of the Rosemount Viaduct Neighbourhood Centre is also identified as located within the City Centre boundary. Three other neighbourhood centres (Holburn, George Street and Leadside Road) are located close to the City Centre Boundary. Figure 2.1 provides an extract of the City Centre detail from the 2017 LDP Proposals Map.

Figure 2.1: Aberdeen City LDP 2017 – City Centre Extract

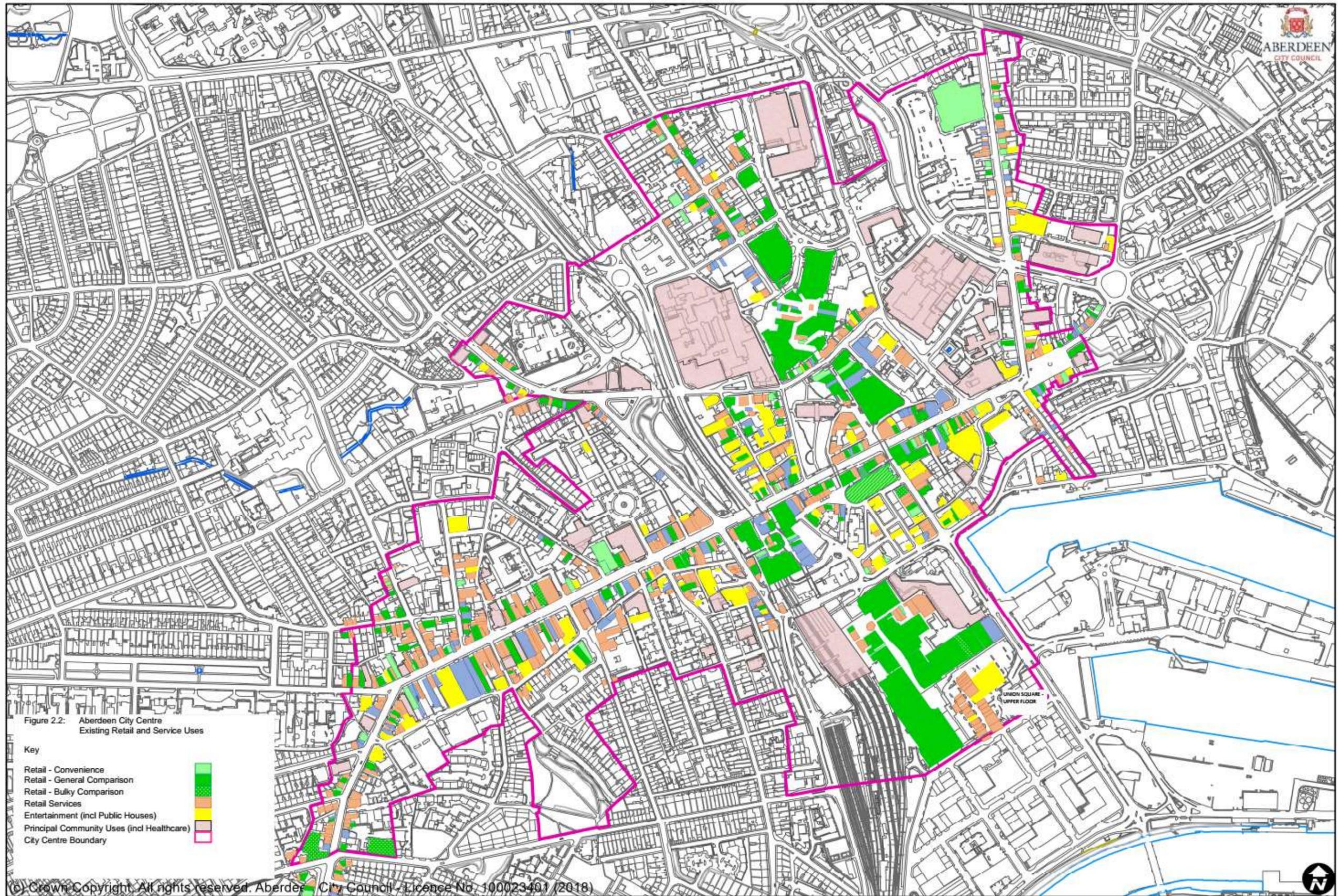


## Description of Land Uses within the City Centre

2.4 There is a wide diversity of uses located within the defined City Centre. In parts (notably the area defined as the “Retail Core” within the Proposals Map) the primary land use is retail but elsewhere there is a mix of:

- retail services (including food and drink, health & beauty, personal finance services etc);
- commercial leisure/entertainment (including cinemas, health clubs, public houses etc);
- public services (including local government offices, services and facilities, higher education, and places of worship etc and principal public transport interchanges);
- Other uses including: offices; hotels; and open space.

2.5 The focus of this review is on retail, retail services, sports, leisure and entertainment uses. The current distribution of these uses is shown in Figure 2.2. The overall distribution of the principal land uses/activities that are of direct relevance to the current study (i.e. retail, retail services, entertainment and leisure) are summarised below.



2.6 Table 2.1 sets out the overall scale of floorspace by type of use within the defined City Centre.

**Table 2.1: 2018 Retail and Retail Service Floorspace – Aberdeen City Centre**

| <i>Use/Activity Type</i>           | <i>No. of Units</i> | <i>Floorspace (Sq M GFA)</i> | <i>Turnover (£m)<br/>2011 Prices</i> |
|------------------------------------|---------------------|------------------------------|--------------------------------------|
| <i>Retail - Convenience</i>        | 68 (7%)             | 33,056 (10%)                 | £95.3m                               |
| <i>Retail – General Comparison</i> | 310 (34%)           | 154,005 (47%)                | £710.3m                              |
| <i>Retail – Bulky Goods</i>        | 15 (2%)             | 14,966 (5%)                  | £55.2m                               |
| <i>Retail Services</i>             | 436 (48%)           | 100,458 (30%)                |                                      |
| <i>Vacant</i>                      | 83 (9%)             | 27,543 (8%)                  |                                      |
| <b>Total</b>                       | <b>912</b>          | <b>330,028</b>               | <b>£860.80m</b>                      |

2.7 In total 378 retail goods shops were identified from Regional Assessor data and survey in November 2018. The types of operator were quite diverse but a relatively high proportion were identified to be national or regional multiple operators – 181 units were multiples i.e. 48% of the total. Multiples have increased in both absolute and proportionate terms within the City Centre. Aberdeen Market is in addition to the retail goods shops identified in Table 2.1.

2.8 The survey undertaken in 2012 (which was used for the 2013 ACARS Report) excluded the King Street area from the City Centre and so, taking this into account, the information from the 2018 survey identifies a significant reduction in total numbers of retail goods shops from the 2012 survey (from 460 to 393 units - a reduction of -15%). In contrast there has been an increase in retail service units within the City Centre as a whole of +19%. Vacant units have also increased – the 2012 survey identified 63 vacant retail units whereas 83 were identified in 2018 – an increase of over 30%. The overall vacancy rate, by numbers of units, has increased from 7.4% identified in 2012 to 9.1% in 2018. This contrasts with the overall situation in the UK where vacancies declined over this period. Aberdeen City Centre still remains slightly below the UK average vacancy rate by numbers of units. In terms of floorspace the vacancy rate is 8.3%.

## Retail Goods Shops

### Overview

2.9 Figure 2.3 (after p11) identifies all current trading retail goods shops within the City Centre. Figure 2.4 identifies trading multiple (national or regional) operators.

2.10 These two figures illustrate how retail goods shops are focussed within the area identified as the retail core in the current LDP – that is on an axis running from the southern end of George Street in the north through to the Union Square retail park in the south and, east-west along Union Street between its junction with Broad Street in the east and as far as Huntly St/Bon Accord St to the west.

- 2.11 To the west of this retail core are scattered retail goods shops in the west end which are predominantly smaller-medium sized retail units (with the Co-op supermarket on the north side of Union Street and Archibalds at the junction of Holburn Street and Great Western Road significantly larger than is typically found in this area). It should also be noted that, in this area, retail activity does not cease at the boundary of the defined City Centre, rather it continues along Holburn Street and includes Gillies furniture store just south of the LDP City Centre boundary with almost continuous retail/retail service activity on both sides of the road as far as Nellfield Place. Additional areas of retail goods shops outwith the retail core are also located in the east – along King Street as far as the Morrisons superstore and also along Justice Street.
- 2.12 There is significant diversity in the type of shopping location available within the City Centre. This mix remains very similar to that identified in the 2013 study comprising:
- 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). In these areas retail units are primarily small specialist and independent traders.
  - The indoor market on Market Street.
- 2.13 As noted in the 2013 ACARS Report the retail units in the City Centre provide a wide range of choice of types of goods sold in shops. 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. 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).
- 2.14 The dominance of the retail core for retail goods shops is also seen in the distribution of national/regional retailers shown in Figure 2.4. This reveals that the vast majority of multiple outlets are located in the principal shopping centres. Even along the central part of Union Street multiples comprise less than half of the retail/retail service units in this area. Outwith the retail core there are few multiples and, where they are found, they are mostly convenience goods shops including major supermarket (e.g. Sainsbury and Morrisons) and CTN<sup>1</sup> operators (e.g. RS McColl).

### **Retail Malls/Shopping Centres**

#### *Union Square*

- 2.15 Union Square opened in October 2009, it was developed by Hammerson plc and remains in that company's ownership. In total it provides 51,800 sq m GFA of retail and leisure floorspace (including circulation space)

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<sup>1</sup> Confectioners, Tobacconists and Newsagents

and has 2300 parking spaces available on-site. The total retail goods floorspace within Union Square (excluding small stalls located within the malls) is, according to Regional Assessor data, 32,755 sq m GFA that is 16% of the total occupied retail goods floorspace of the City Centre. In November 2018 only one unit was being marketed as available which is located at the furthestmost point of the retail park section of the development – this unit is 2179 sq m GFA. 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.

- 2.16 Commercially Union Square is, undoubtedly, very successful with most units occupied by national/international multiples including M&S, H&M and Next. The undercover mall part of the development is predominantly fashion retail-led whereas the retail park area is more mixed with household and major discount clothing (notably TK Maxx). The development has a high proportion of leisure and entertainment uses. Table 2 sets out the floorspace identified by the agents for the development.

**Table 2: Union Square Units and Floorspace (source: Hammerson/Culverwell)**

| <i>Use/Activity Type</i>           | <i>No. of Units</i> | <i>Gross Floorspace (Sq M)</i> |
|------------------------------------|---------------------|--------------------------------|
| <i>Retail - Convenience</i>        | 2                   | 136 (0%)                       |
| <i>Retail – General Comparison</i> | 41                  | 25,578 (50%)                   |
| <i>Retail – Bulky Goods</i>        | 1                   | 468 (1%)                       |
| <i>Food &amp; Drink</i>            | 29                  | 10,000 (20%)                   |
| <i>Other Ret Services</i>          | 1                   | 209 (0%)                       |
| <i>Cinema</i>                      | 1                   | 4,235 (8%)                     |
| <i>Hotel</i>                       | 1                   | 8,056 (16%)                    |
| <i>Vacant</i>                      | 1                   | 2,179 (4%)                     |
| <b>Total</b>                       | <b>77</b>           | <b>50,861</b>                  |

*Note: there are differences in categorisation of units and date of survey information between agents and Regional Assessor. RA data identifies 32755 sq m GFA retail goods floorspace which is used in Strategic Retail Model.*

- 2.17 In Feb 2016 Hammerson (Union Square Developments) submitted an application for the extension of Union Square which was approved in July 2018 (ref 152005). The application proposed a mix of floorspace *potentially* including Class 1, Class 3, Class 11, car parking and associated infrastructure. In total development of up to approximately 38,500 sq m GFA was identified with net lettable floorspace of 27,870 sq m. The proposal was, however, more conceptual rather than specific and it appears that the purpose of the application is to identify the potential for extending the centre with development blocks located to the rear of the existing development (i.e. over the existing surface level car park) and with an extension to the cinema.

*Bon Accord/St Nicholas*

- 2.18 The Bon Accord/St Nicholas Centres were sold in 2013 to the F&C REIT which is part of the Noe Group. It opened in April 1990. The centre includes a first-floor link into the John Lewis store on George Street. In total the development includes the Bon Accord centre, the St Nicholas Centre and John Lewis providing, in total, approximately 51,500 sq m GFA (all uses). 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. Units on the west side of George Street are also in the same ownership and would further increase the total floorspace under the control of the same ownership. This additional space includes occupiers such as Cash Converters, Savers and Farmfoods. Table 2.3 sets out a summary of the retail units located within the two malls plus the John Lewis department store but excluding units on the west side of George Street.

**Table 2.3: Bon Accord/St Nicholas Units & Floorspace (source: Eric Young & Co)**

| <b>Use/Activity Type</b>           | <b>No. of Units</b> | <b>Gross Floorspace (Sq M)</b>            |
|------------------------------------|---------------------|---|
| <i>Retail - Convenience</i>        | 2                   | 761                                       |
| <i>Retail – General Comparison</i> | 47                  | 47,084 (includes all John Lewis)          |
| <i>Retail – Bulky Goods</i>        | 0                   | (John Lewis BG floorspace included above) |
| <i>Ret Services</i>                | 7                   | 1487                                      |
| <i>Vacant</i>                      | 6                   | 1802                                      |
| <b>Total</b>                       | <b>62</b>           | <b>51,134</b>                             |

- 2.19 The owners of the Bon Accord/St Nicholas have submitted two significant planning applications in recent years:

- 170353/PPP - Mixed use development comprising Class 1 (Shops), Class 2 (Professional services), Class 3 (Food and drink), Class 4 (Business), Class 7 (Hotels), flats, serviced apartments, access, services and all ancillary development and associated demolitions. This includes both the northern

part of the Bon Accord and the whole of the site to the west of George Street. The application is in principle and so detailed plans are not available but the indicative layouts show three major development blocks which have the potential for providing additional modern retail and other floorspace.

- 141192 - Change of use of 11 retail units to 7 restaurants, demolition of rear stairwell and internal and external alterations to accommodate 7-screen cinema. A S42 application (171136) was submitted and approved in 2017 for amending this consent.

2.20 It should also be noted that, within part of the site covered by the George Street application, planning permission has recently been granted for changing use from retail to Class 10.

#### *Trinity*

2.21 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 was purchased by LSREF3 Tiger Aberdeen S.À.R.L in 2014. 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 the major store with 8,980sq m GFA and the remainder of the Trinity Centre is 8,757 sq m GFA (all uses). The principal changes to the centre since 2013 have been the closure of Argos in 2017 and Waterstones in 2018. The former has relocated into existing Sainsbury stores at Berryden and Garthdee (part of the restructuring strategy following the acquisition of Argos by Sainsbury in 2016) and the latter have relocated into the former Monsoon unit in Bon Accord. Table 2.4 summarises the units within the centre.

**Table 2.4: Trinity Centre (source: Regional Assessor and Survey Nov 2018)**

| <b><i>Use/Activity Type</i></b>    | <b><i>No. of Units</i></b> | <b><i>Gross Floorspace (Sq M)</i></b> |
|------------------------------------|----------------------------|---------------------------------------|
| <i>Retail - Convenience</i>        | 2                          | 439 (2%)                              |
| <i>Retail – General Comparison</i> | 14                         | 13,307 (75%)                          |
| <i>Food &amp; Drink</i>            | 3                          | 468 (3%)                              |
| <i>Vacant</i>                      | 6                          | 3,523 (20%)                           |
| <b><i>Total</i></b>                | <b>25</b>                  | <b>17,737</b>                         |

2.22 No significant planning applications have been submitted for the Trinity Centre since 2013.

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*Academy and Galleria*

2.23 The Academy Centre is located adjacent to Belmont Street and Schoolhill. Although described by its marketing agents (CBRE) “one of Aberdeen’s principle [*sic*] retail destinations” its primary use is leisure and entertainment rather than Class 1 retail. The space mix in Nov 2018 was as follows:

- Comparison goods – 3 units – including Jack Wills and Attic (1111 sq m GFA)
- Cafes and Bars – one public house and 3 no. cafes/restaurants (the latter were 706 sq m GFA)
- Vacant – 2 units (243 sq m GFA)

2.24 The centre is located within the identified retail core, located opposite Robert Gordon College and is an important component of the mixed leisure/retail area focussed on Belmont Street.

2.25 The Galleria opened in 1998 and comprises primarily retail service units. In November 2018 there were no retail goods shops within the centre (two small units were identified in the 2012 survey). Currently the agents (Shepherds) are marketing 4 small units as available (total 251 sq m GFA). The remainder of the space at ground floor level is occupied by food/drink operators.

**Other Areas: Union Street**

2.26 Although Union Street is the traditional retail heart of the City Centre its role has steadily diminished reflecting a combination of factors: first that the space available is not well suited to modern retailer requirements; and, secondly, although it has retained excellent public transport access, for shoppers travelling by car it is less accessible than either Union Square or Bon Accord/St Nicholas. In addition, it offers a less attractive or safe shopping environment than either of the shopping malls – particularly during inclement weather.

2.27 Nonetheless, important retail units are still located on Union Street which generate significant pedestrian footfall – notably Primark adjacent to the Trinity Centre. The closure of BhS has, however, had a significant effect although, fortunately for Union Street, this unit has a very restricted frontage and has, therefore, had limited impact on the image of the street frontage.

2.28 Within the retail core approximately half of the units fronting onto Union Street are retail goods operators but these rarely provide a continuous retail goods frontage. Retail services (notably for food/drink and health/beauty) have steadily increased their presence and there are also a significant number of vacant units along the main frontage. West of the Trinity Centre the predominant use is for services and leisure/entertainment which also includes significant non-commercial entertainment including the Music Hall.

**Other Areas: West End**

2.29 The West End is focussed on Union Street which was described above. Notable developments in recent years have seen changes of use to offices (e.g. former Capitol Cinema and 445-461 Union Street). In this area traditional retail goods shops are a minority activity in a predominantly mixed-use area.

2.30 On the north side of Union Street, centred on Rose Street and Thistle Street, there are a significant number of small independent retail goods shops intermixed with retail services. The independent nature of the shops combined with relatively quiet streets results in an attractive environment which appears to serve both a specialty retail function and food and drink facilities for staff/visitors in nearby offices and hotels. This reflects well the designation of this area as the West End Shops and Cafes area (Policy NC3) in the current LDP.

#### **Other Areas: King Street**

2.31 The King Street area comprises the north eastern corner of the designated City Centre. It is difficult to identify a clear coherent function for this area, rather it comprises a series of disparate activities:

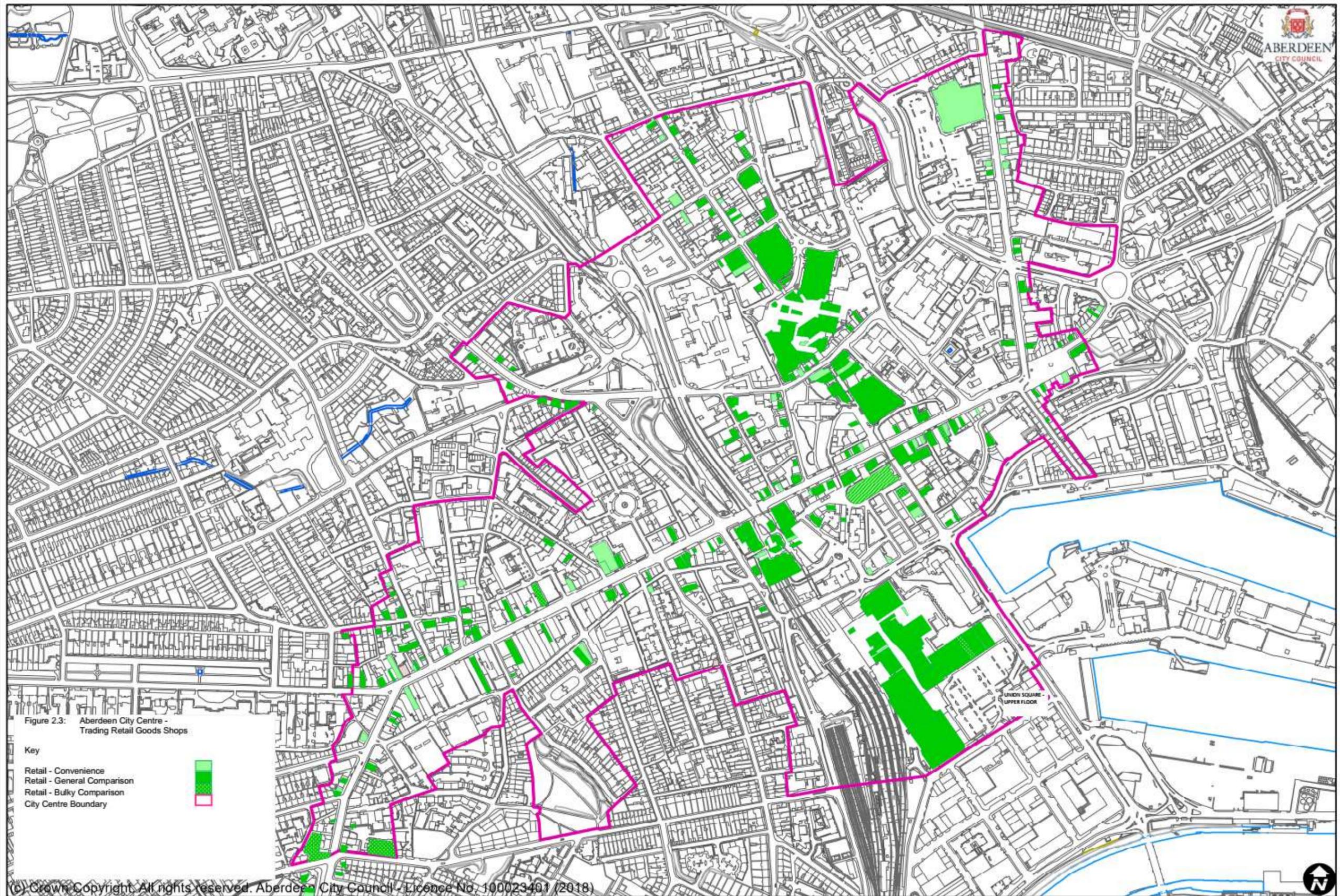
- Morrisons superstore – although this has a direct pedestrian link to King Street the primary orientation of the supermarket is serving car borne trade having an extensive free car park accessed from West North Street.
- Diverse small, predominantly independent retail and retail service units along King Street. These appear to be based on walk-in trade providing day-to-day shopping or service requirements.
- Buzz Bingo (formerly Gala Bingo).
- The Aberdeen Community Healthcare Village

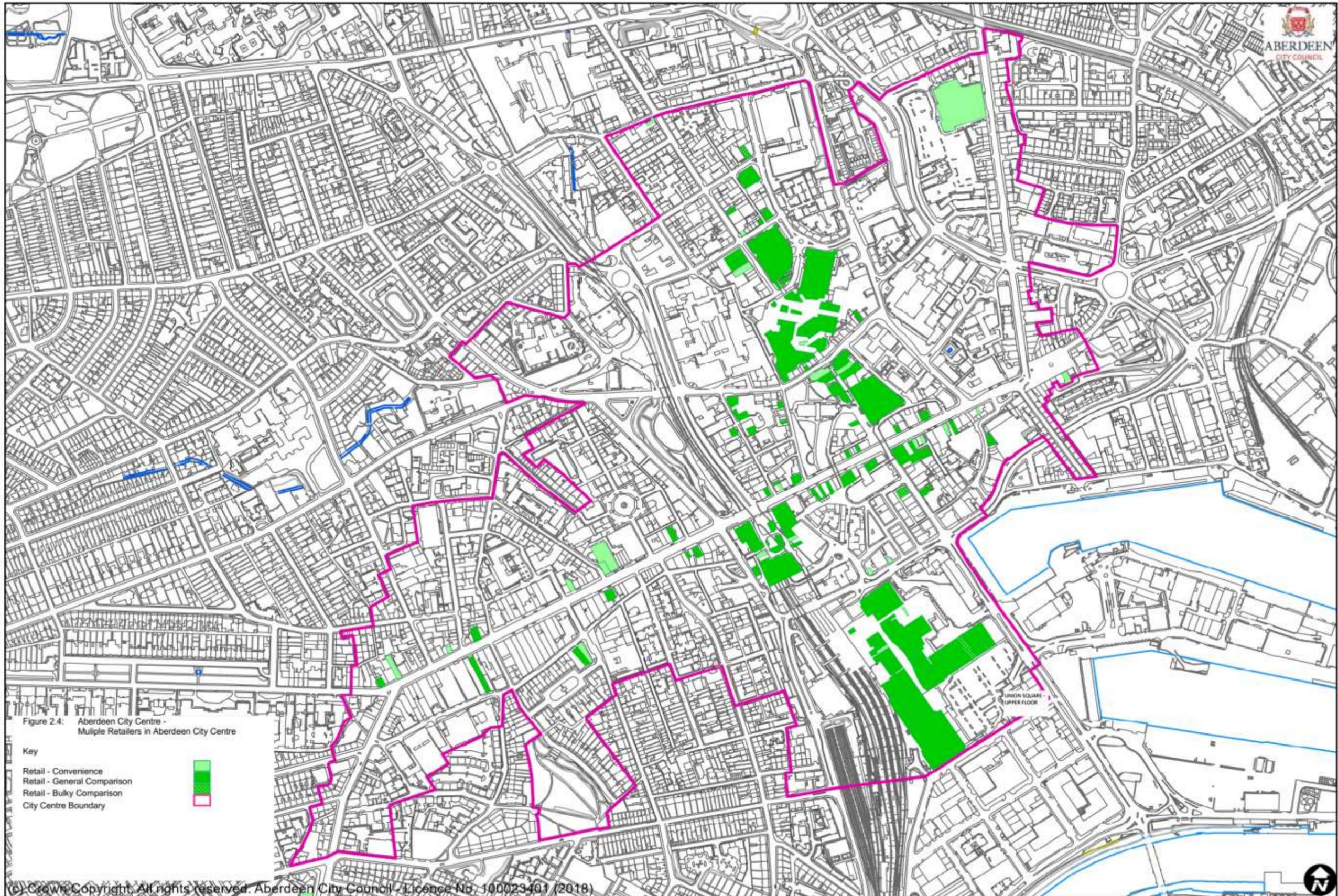
2.32 Most of the King Street area does not share characteristics that one would typically expect from its designation within the City Centre. With the exception of the Morrisons superstore the retail and retail service units present serve local and pass-by trade and the superstore is one of many located throughout the City. There is no clear functional linkage between Morrisons and the remainder of the designated City Centre. However, at the southern end of King Street, i.e. closest to the remainder of the defined City Centre, is the NHS Health Village, bingo club and the Premier Inn. A recommendation of this report is that the City Centre boundary should be amended to include these uses but exclude the remainder of the King Street area from the defined City Centre.

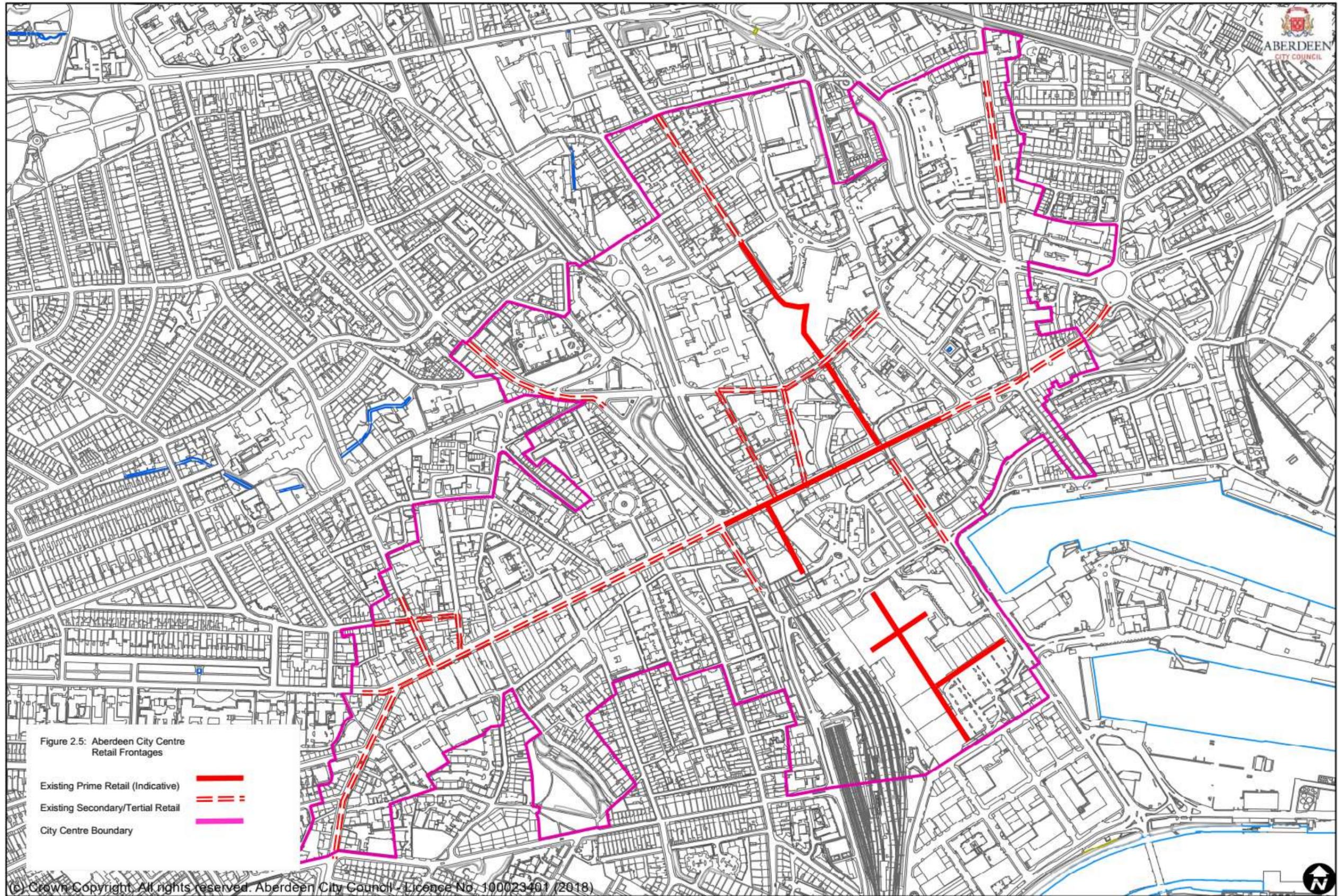
2.33 Consideration should be given to whether or not the Morrison's store together with adjacent parts of King Street should be designated a different type of centre within the retail hierarchy. Whereas other District Centres (for example Rousay Drive) have been identified which are dominated by a single superstore with adjoining units this has reflected a relatively strong relationship between the principal store and surrounding residential areas. Furthermore, these centres have coherent and well-defined parades/malls of additional retail and retail service units. It is considered that Morrisons/King Street does not fit within this type of District Centre. There is no indication from the household survey information (undertaken in 2012) that there is a strong relationship between Morrisons and a clearly defined part of the City. Undoubtedly there is important walk-in trade from immediately adjacent residential areas but the location of the store results in trade being drawn from a relatively wide area. King Street, in the vicinity of Morrisons, provides a near continuous range of retail and retail services. In this report it is considered that there is insufficient information to warrant the identification of this area as a separate District Centre although it is recommended that the combination of Morrisons and the adjoining parts of King Street should be identified as a Neighbourhood Centre if the Council decide to remove this area from the defined City Centre.

**Primary and Other Retail Frontages**

- 2.34 Figure 2.5 draws on information from the survey to identify the principal retail frontages within the City Centre. This is similar to that identified in 2013 except that the primary frontage along Union Street is shown to be more limited than identified previously.







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## Retail Services and Commercial Leisure Uses

2.35 Figure 2.6 shows the location of all retail services and commercial leisure uses identified in November 2018 in the City Centre. The uses included within these categories include the following:

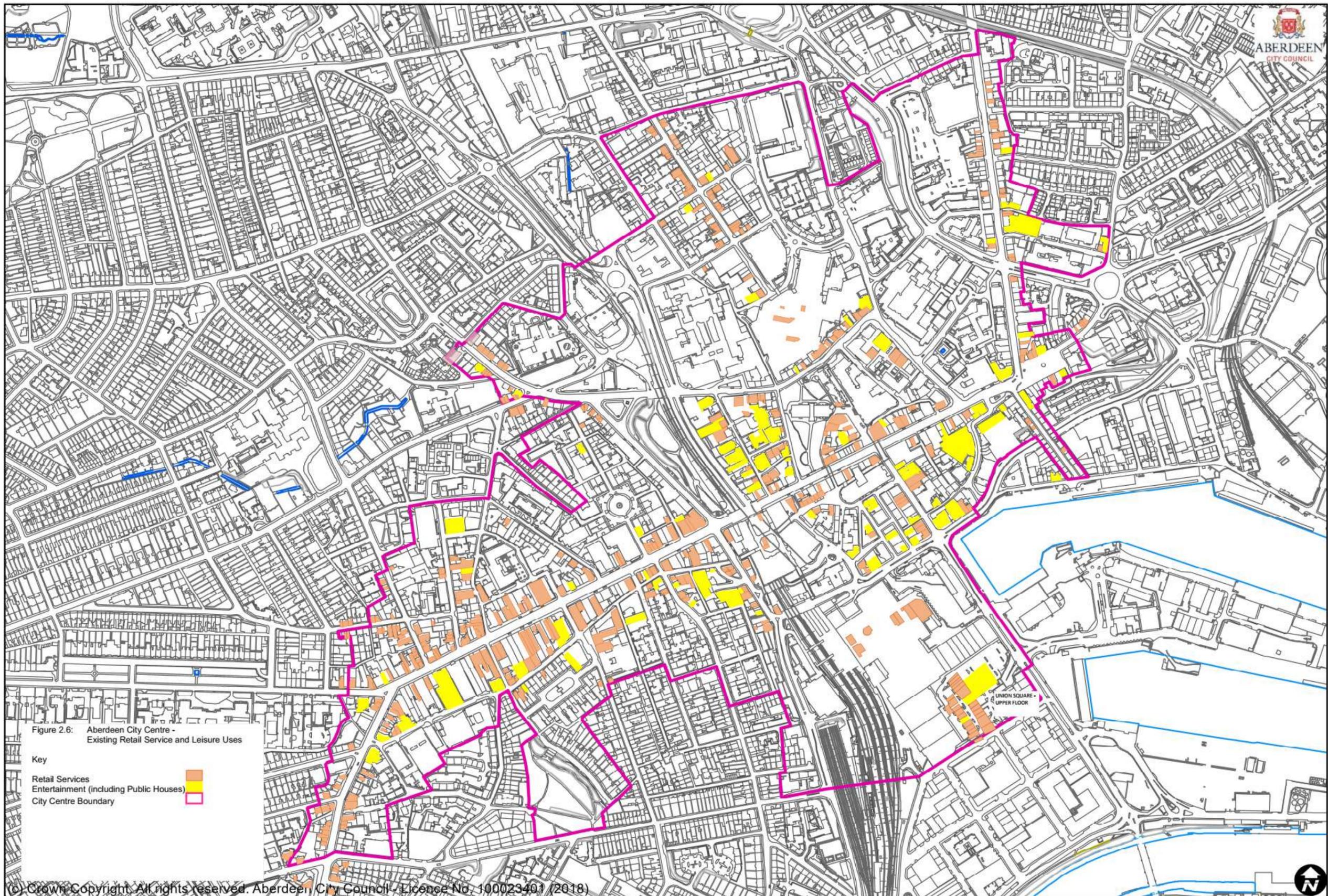
### *Retail Services (Goal Classification)*

- Cafes and Restaurants (i.e. hot-food eat-in and carry-out)
- Cold food carry-out (e.g. sandwich bars etc)
- Hairdressing, health and beauty
- Financial services (to passing members of the public – banks, financial advice etc)
- Other services to passing members of the public – estate agents; travel agents, betting shops etc.

### *Commercial Leisure etc*

- Public houses
- Cinemas and Bingo
- Night clubs

2.36 It should be noted that the differences between specific types of activity are becoming increasingly blurred – for example many public houses are food-led and offer coffee as well as bar drinks which overlap significantly with restaurants and cafes. Furthermore, it should be noted that many leisure and entertainment activities are provided on a non-commercial basis (for example council owned music venues and theatres). These types of location are not identified in Figure 2.6.



- 2.37 Figure 2.6 reveals a number of significant characteristics of the distribution of retail services and leisure uses within the City Centre. It shows that these uses are very widely distributed throughout the Centre. Even within the major shopping malls leisure and entertainment activities are located at upper levels and, in the largest stores (e.g. John Lewis and Debenhams), cafes are included within the footprint of the stores – again these additional venues are not shown in Fig 2.6.
- 2.38 There are, however, a number of areas where there is a particular concentration of leisure and entertainment uses:
- West End – both along the western end of Union Street and in the Rose Street/Thistle Street area. On the south side of Union Street, particularly along Justice Mill Lane, Langstane Place and Windmill Brae these types of uses are especially significant.
  - Belmont Street area – here is a key concentration for entertainment uses, predominantly public houses but also an independent cinema and night clubs. These uses extend to the east side of St Nicholas Kirk.
  - Ship Row/Trinity Quay area – as well as including the Vue cinema and Lane 7 bowling (shown on Figure 2.6) this area also includes a major commercial gym and the Maritime Museum.
  - Between the Market and Guild Street are a number of public houses and bars as well as retail service units. These are mixed with residential premises.
  - Upper floor of Union Square. In total this area includes both a major multiplex cinema and 22 restaurants (plus a further 7 at the ground floor level).
  - King Street area – most of the retail services in this area are linked to small cafes and health and beauty serving a local walk-in catchment. The Buzz Bingo serves a wider city-based catchment.

## Market and Catchment Characteristics

- 2.39 The update of the retail model identifies that the catchment areas served by the City Centre remain similar to those identified in 2013 reflecting the fact that the City Centre is the principal regional centre serving the whole of north east Scotland.

### Comparison Goods

- 2.40 Although the City Centre serves the whole of north east Scotland for comparison goods, the City Centre's primary and secondary catchment areas reflect the distribution of population in the north east. In this way the primary catchment area for the City Centre, for both general and bulky comparison goods, is defined by the high population zones within the city located closest to the centre. The secondary catchment areas extend further out from the city but, due to the low population densities in remoter areas, these have not been included within the secondary catchments. Nonetheless, the diagrams showing market penetration rates reveal that, regardless of whether or not areas are identified within defined catchment areas the City Centre is still very important for all parts of the north east of Scotland, especially for general comparison goods. In this way the City Centre has market penetration rates for general comparison goods in excess of

30% for almost all parts of the city and shire – the only exceptions being the northern coast which are furthest from the city and have some alternative options including Inverness, Elgin and Fraserburgh/Peterhead, but even in these areas the City Centre remains an important destination for general comparison shopping.

- 2.41 The bulky goods offer is more limited, but the City Centre is still an important retail destination for these goods for much of the north east.

### **Convenience Goods**

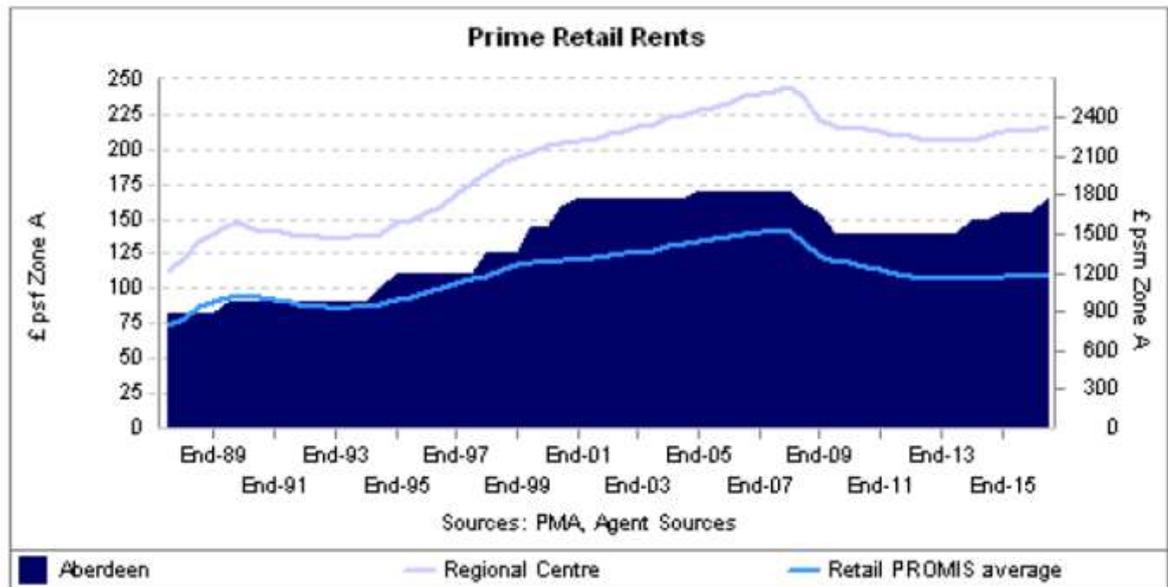
- 2.42 The primary and secondary catchment areas of convenience shops within the City Centre are generally quite limited. The most important convenience shop within the City Centre area is the Morrisons superstore on King Street which has a relatively wide catchment and its market penetration is also constrained as a result of competition from other superstores located throughout the City – in particular Asda (Boulevard) and Sainsbury (Berryden). 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, they provide specialty products that draw trade from a wide catchment (this includes those retailing perceived high quality foods – both independents and multiples such as M&S).
- 2.43 Market penetration rates for convenience goods shops (including Morrisons) are, however, relatively low.

### **Vitality and Viability Indicators**

- 2.44 This section will review the principal indicators of vitality and viability used in health checks for the City Centre. It also identifies changes that have occurred over time with these indicators to identify any significant trends.

### **Retail Rents and Yields**

- 2.45 Savills, in their review of the property market for Aberdeen City Council (July 2017), noted that the Promis report for Aberdeen identifies Prime Zone A rents for retail to have returned to £165 psf, i.e. £1776 psm. This is an increase from the position in 2011 which was identified by GVA to be about £1450 psm (quoted in ACARS Report). Figure 2.7 reproduces the diagram showing changes in Prime Zone A rents since the late 1980s in Aberdeen (provided as Figure 6 in the Savills Report)

**Figure 2.7: Prime Zone A Rents for Aberdeen City Centre**

Source: PROMIS

- 2.46 Highest rents are achieved in Union Square with the best rents in Bon Accord approximately 10-15% below this (£140-150 psf) and further discounts identified for St Nicholas (£110 psf), Trinity (£80 psf) and Union Street (£80-90 psf). However, it should be noted that rents decline quite rapidly along Union Street away from the prime pitch to approximately £30-£45 psf and depend on profile, size of unit, quality of space available and covenant of the tenant.
- 2.47 Prime Zone A rents in Aberdeen are the third highest for traditional centres in Scotland (after Glasgow and Edinburgh) although rents achieved are significantly below those found in the larger cities. Current prime retail yields have been identified to be 6.60% which would represent no change from that identified in 2011. As with rents this is the third strongest yield level in Scotland but remains significantly softer (i.e. higher) than either Glasgow or Edinburgh<sup>2</sup>. Table 2.5 identifies key measures of retail viability based on prime rent, yield and overall retail centre ranking showing how these have changed over time along with comparisons with the other major cities in Scotland.

<sup>2</sup> A low percentage yield results in higher capitalisation of a rental income. Yield is therefore probably more important than rent in determining the viability of new development based on the capital value of the development once completed. Yield is a measure of risk with a low yield indicative of an expectation of significant rental growth and a high yield indicative of higher risk/lower expected growth.

**Table 2.5: Scottish Cities – Key Prime Retail Indicators**

|  | Aberdeen           | Dundee | Edinburgh | Glasgow |
|--|--------------------|--------|-----------|---------|
| <b>Prime Zone A Rents</b>                |                    |        |           |         |
| 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  |
| 2018                                     | £1,776             | £915   | £2,583    | £3,229  |
| <b>Prime Zone A Yields</b>               |                    |        |           |         |
| 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%   |
| 2018                                     | 6.60%              | 7.00%  | 4.75%     | 4.00%   |
| <b>Retail Centre Ranking<sup>3</sup></b> |                    |        |           |         |
| 2009                                     | 20                 | 72     | 4         | 1       |
| 2010                                     | 16                 | 56     | 5         | 1       |
| 2011                                     | 14                 | 43     | 5         | 1       |
| 2017                                     | 11/15 <sup>4</sup> |        | 9         | 2       |

**Retail Mix**

2.48 Table 2.6 sets out a breakdown of type of use for the principal parts of the City Centre showing how these have changed since 2012. It should be noted that these figures differ from the information provided by the Regional Assessor but remain useful to understand the overall patterns of distribution of activities/use within different parts of the City Centre. The areas used in this table are shown in Figure 2.8. Table 2.7 provides similar information for the shopping centres.

<sup>3</sup> Venuescore unless stated.

<sup>4</sup> PMA Retail Score 2017

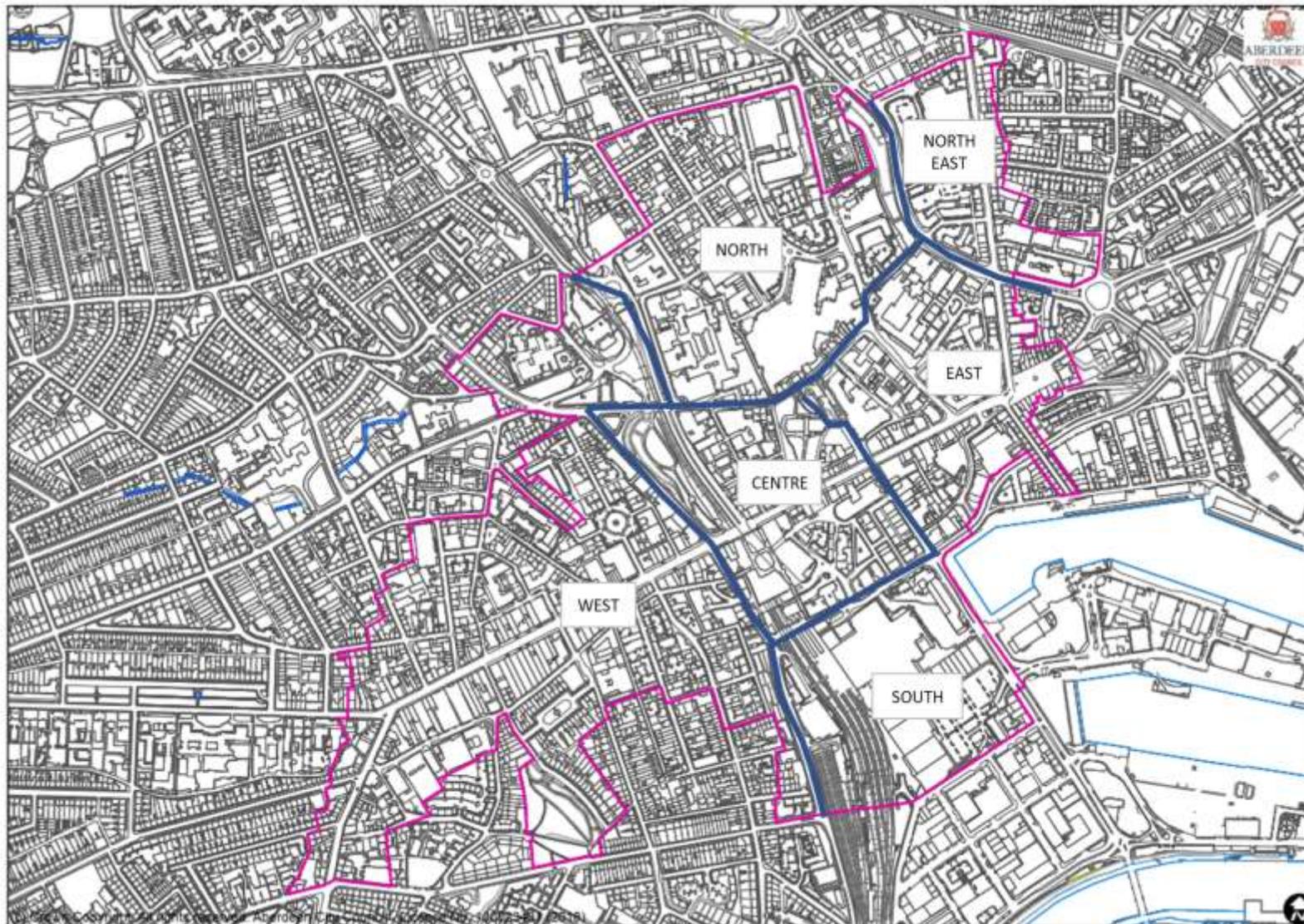
**Table 2.6: Changes in Numbers of Retail Units 2012-2018 for the City Centre**

| Change 2012-18         | Retail Goods |             | Retail Services |             | Vacancies |             | Total |            |
|------------------------|--------------|-------------|-----------------|-------------|-----------|-------------|-------|------------|
|                        | Count        | Percent     | Count           | Percent     | Count     | Percent     | Count | Percent    |
| <b>Centre</b>          | -14          | <b>-17%</b> | 7               | <b>13%</b>  | 7         | 39%         | 0     | 0%         |
| <b>East</b>            | -6           | <b>-11%</b> | -8              | <b>-20%</b> | 10        | <b>125%</b> | -4    | -4%        |
| <b>North East</b>      |              |             |                 |             |           |             |       |            |
| <b>North</b>           | -4           | -4%         | 12              | <b>21%</b>  | 15        | <b>150%</b> | 23    | <b>14%</b> |
| <b>South</b>           | -1           | -2%         | 1               | 3%          | -5        | <b>-83%</b> | -5    | -6%        |
| <b>West</b>            | -14          | <b>-14%</b> | 19              | <b>11%</b>  | 12        | 43%         | 17    | 6%         |
| <b>Total (excl NE)</b> | -39          | <b>-10%</b> | 31              | 9%          | 39        | <b>56%</b>  | 31    | 4%         |

**Table 2.7: Changes in the Principal Shopping Centres 2012-2018**

|                               |          | Convenience | General Comparison | Bulky Goods | Retail Services | Vacancies | Total |
|-------------------------------|----------|-------------|--------------------|-------------|-----------------|-----------|-------|
| <b>Union Square</b>           | 2012     | 3           | 47                 | 1           | 26              | 6         | 83    |
|                               | 2018     | 2           | 46                 | 1           | 30              | 1         | 80    |
|                               | Change   | -1          | -1                 | 0           | 4               | -5        | -4    |
|                               | % Change | -33%        | -2%                | +0%         | +15%            | -83%      | -5%   |
| <b>Bon Accord/St Nicholas</b> | 2012     | 2           | 49                 |             | 13              | 3         | 67    |
|                               | 2018     | 3           | 55                 |             | 7               | 6         | 71    |
|                               | Change   | +1          | +6                 |             | -6              | +3        | +4    |
|                               | % Change | +50%        | +12%               |             | -46%            | +100%     | +6%   |
| <b>Trinity</b>                | 2012     | 2           | 17                 |             | 1               | 3         | 23    |
|                               | 2018     | 2           | 14                 |             | 3               | 6         | 25    |
|                               | Change   | 0           | -3                 |             | +2              | +3        | +2    |
|                               | % Change | +0%         | -18%               |             | +200%           | +100%     | +9%   |
| <b>Academy</b>                | 2012     |             | 4                  |             | 2               | 3         | 9     |
|                               | 2018     |             | 3                  |             | 3               | 2         | 8     |
|                               | Change   |             | -1                 |             | 1               | -1        | -1    |
|                               | % Change |             | -25%               |             | +500%           | -33%      | -11%  |

Figure 2.8: City Centre Survey Zones



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*Convenience Goods*

- 2.49 There has been a reduction in the total number of convenience goods shops within the City Centre – from 74 in 2004 and 75 in 2012 to 68 in 2018. Convenience goods shops are, however, distributed reasonably regularly around the City Centre. However, this is not the case in terms of convenience floorspace which is dominated by Morrisons and with additional significant floorspace within M&S and the Co-op/Sainsbury stores in the centre/west areas.

*Comparison Goods*

- 2.50 Comparison goods shops have also declined significantly since 2004 and the rate of change between 2012 and 2018 has accelerated this trend compared to the earlier period. In terms of total numbers comparison goods shops are evenly distributed around the City Centre however, the floorspace information confirms that there are concentrations in the North, Central and Southern parts of the City Centre – associated with the location of the major shopping malls.

*Retail Services*

- 2.51 In strong contrast to the position with retail goods shops there has been a substantial growth in numbers of retail service units – increasing from 308 in 2004 to 365 in 2012 and 436 in 2018.

*Vacancies*

- 2.52 These will be considered separately below.
- 2.53 Table 2.7 shows how these changes have affected the principal shopping centres:
- Union Square: in terms of units there has been a marginal reduction in numbers of retail goods shops but an increase in retail services together with a notable reduction in vacancies.
  - Bon Accord: the key changes here are the increases in vacancies and reduction in retail service units.
  - Trinity: the principal change here has been the significant increase in vacancies

*Multiples*

- 2.54 Figure 2.5 showed the distribution of regional and national multiples for retail goods shops within the City Centre. Table 2.8 identifies the location of these units by area and changes since 2012. It should be noted that the figures in the table relate to observed units in the November 2018 survey and differ from the more comprehensive information provided by the Regional Assessor. Notwithstanding this limitation the table illustrates the general changes that have occurred in different parts of the City Centre.

**Table 2.8: Distribution of Retail Multiples and Distribution by Area in the City Centre**

|                  |                 | Count      | Percentage of Multiples of all Goods Shops in Area |
|------------------|-----------------|------------|--|
| <b>2012</b>      | Centre          | 47         | 57%  |
|                  | East            | 27         | 49%  |
|                  | North East      |            |  |
|                  | North           | 45         | 46%  |
|                  | South           | 34         | 65%  |
|                  | West            | 18         | 19%  |
|                  | <b>Total</b>    | <b>171</b> | <b>45%</b>   |
| <b>2018</b>      | Centre          | 42         | 62%  |
|                  | East            | 26         | 53%  |
|                  | North East      | 1          | 8%   |
|                  | North           | 46         | 49%  |
|                  | South           | 48         | 94%  |
|                  | West            | 18         | 22%  |
|                  | <b>Total</b>    | <b>181</b> | <b>51%</b>   |
| Change 2012-2018 | Total (excl NE) | +10        | +6%  |

2.55 Table 2.8 shows that both the total number and proportion of retail goods shops that are operated by national or regional multiples has increased since 2012. It also confirms that a large majority of these units are located in the north, central and southern parts of the City Centre (75%) and that this proportion has marginally increased since 2012.

### Overall Retail Rankings

2.56 Table 2.5 noted that, for 2017, Javelin Venuescore ranks Aberdeen City Centre as 11<sup>th</sup> in the UK and the PMA Retail Score 15<sup>th</sup> (and also 15<sup>th</sup> on the PMA Fashion Score, 17<sup>th</sup> on the PMA Anchor score). According to Savills in their 2017 report to the City Council “*the city has broadly the expected volume and quality of retail provision relative to the size and affluence of the shopping population*”.

2.57 Due to the difficulties associated with trying to encapsulate the full characteristics of a major centre into a single indicator it is considered that considerable caution should be exercised in using these retail rankings. Each ranking simply reflects the particular variables used by the formulators of the rankings – for example the Venuescore measure is only based on multiples present in a centre. By way of comparison, Venuescore had ranked the City Centre as 12<sup>th</sup> in 2013 but Experian had previously ranked Aberdeen as 20<sup>th</sup> in the UK in 2009 and as low as 39<sup>th</sup> in 2002.

### Occupier Demand and Activity

2.58 In their review for the City Council in 2017 Savills considered that there was a relatively high level of demand for retail and related units considering the size of the city. They noted that:

- Active requirements had declined in recent years because demand had been met through Union Square but still remains higher than the Retail PROMIS average.

- Savills anticipate that demand for units in Bon Accord/St Nicholas and Union Square is likely to be from retailers seeking to gain representation within the City Centre and they note that certain retailers (e.g. Ted Baker, Whistles, Timberland and Space NK) are conspicuous by their absence.
- However, they note that certain retailers operate from more than one unit within the City Centre and they are likely to be reassessing their requirements due to local economic factors.

2.59 The Requirement List identifies 27 operators seeking space within the City Centre in December 2018 although these include significant numbers of food/drink, leisure and also hotel operators.

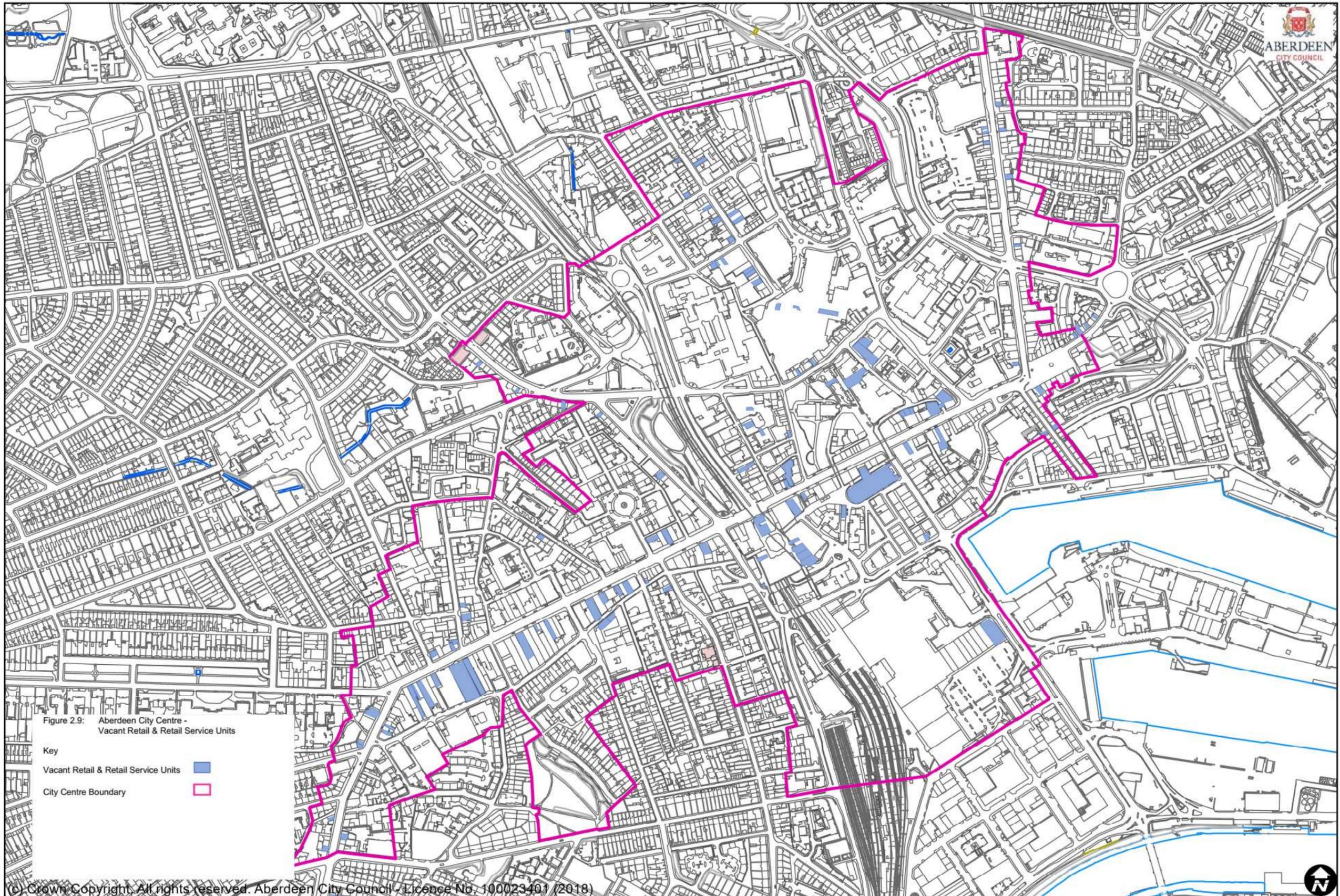
2.60 The current proposals at Bon Accord both for leisure and food/drink at the upper level and for the development of land west of George Street would suggest significant potential demand in retail, retail services and leisure sectors. Similarly, the Hammerson's application for the extension of Union Square could suggest the same. Both of these proposed extensions are planning applications in principle and these cannot be taken to confirm that demand for units is in place.

### **Vacancy Rates**

2.61 From Regional Assessor and survey data there were 83 vacant units in November 2018 totalling 27,543 sq m GFA floorspace. This equates to a vacancy rate of 9.1% by number of units and 8.3% by floorspace. Figure 2.9 shows the distribution of vacant units across the centre. This shows that vacant units are dispersed across all parts of the City Centre although concentrations can be identified in the central and western parts of Union Street. It should be noted that the vacant BhS unit, identified in the figure, only concerns the upper level of the Market building – the lower two floors of the building are occupied by market units. The figure also shows that there are significant vacancies in the major retail malls although the vacancy rate in Union Square and Bon Accord is lower than other parts of the City Centre:

- Union Square – vacancy rates of 1% by units and 5.6% by floorspace.
- Bon Accord – vacancy rates of 7.5% by units and 4.4% by floorspace.
- St Nicholas – vacancy rates of 11% by units and 8.2% by floorspace.
- Trinity – vacancy rates of 24% by units and 19.9% by floorspace.
- Academy – vacancy rates of 25% by units and 11.8% by floorspace.

2.62 Although vacancies are slightly below national average levels there has been a significant increase across the City Centre as a whole and this has occurred over a period in which national vacancies have gradually declined.



**Mix of Uses/Activities**

- 2.63 Table 2.1 showed that there are 68 convenience goods shops, 310 general comparison and 15 bulky goods shops within the City Centre. In addition, 436 retail service units have been together with 83 vacant retail/retail service units. In total the survey has identified 912 retail and retail service units within the City Centre. All of the categories of retail goods and retail services identified in Goad surveys are present within the City Centre and for most of these there is considerable choice for consumers.
- 2.64 Figure 2.6 showed that there are also a wide range of additional entertainment, leisure and public services available within the City Centre and these make a major contribution to its vitality and viability. Table 2.9 identifies the additional facilities and services available within the City Centre identified in the November survey.

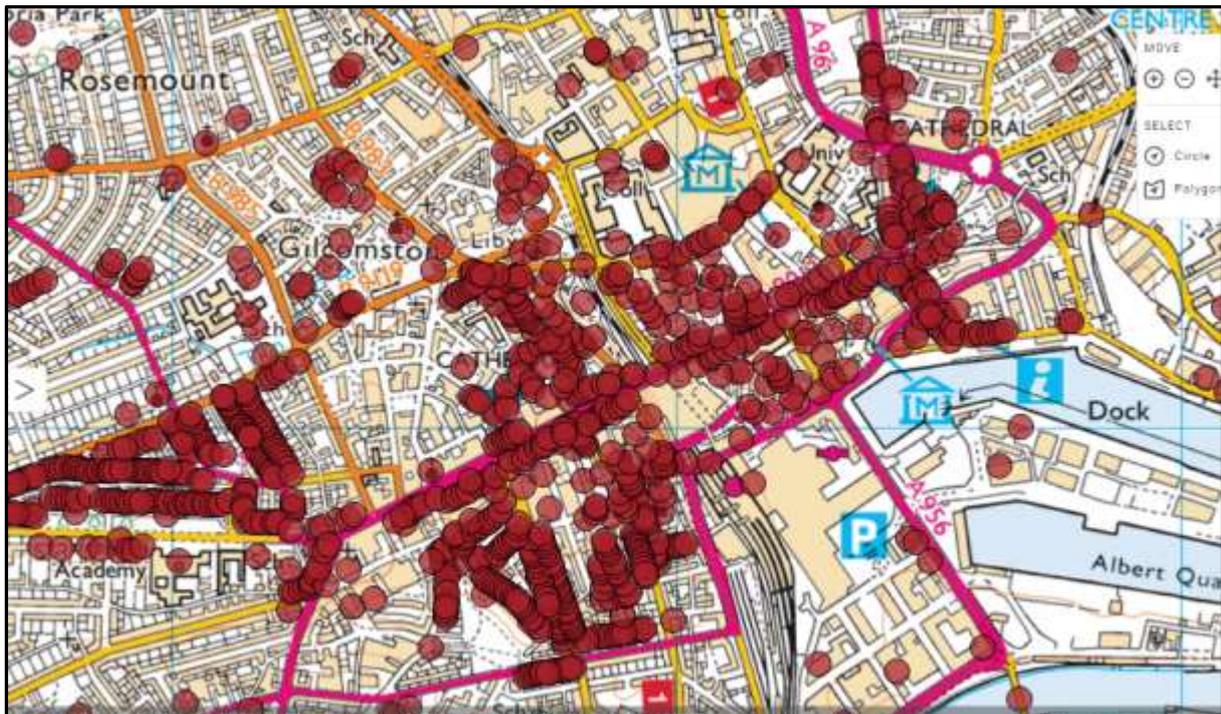
**Table 2.9: Additional Facilities and Services in Aberdeen City Centre**

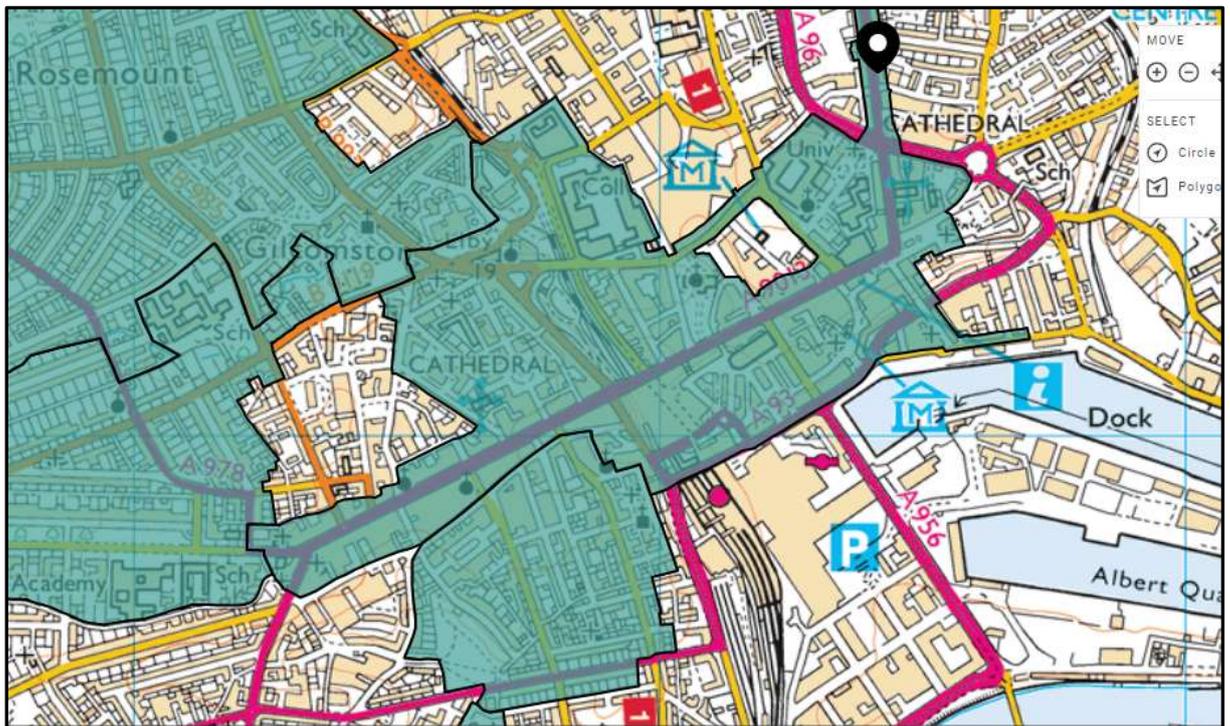
| <b>Service/Facility</b>          | <b>No.</b> | <b>Notable Examples</b>   |
|----------------------------------|------------|---|
| Aberdeen Science Centre          | 1          |   |
| Art Gallery                      | 1          |   |
| Bingo Hall                       | 1          | Buzz Bingo  |
| Bus Station                      | 1          |   |
| Casinos                          | 3          |   |
| Churches/Places of Worship       | 21         |   |
| Cinema                           | 3          |   |
| Clinics                          | 8          |   |
| Clubs                            | 13         | Comedy Club   |
| Council HQ                       | 1          |   |
| Concert Hall                     | 1          | Aberdeen Music Hall   |
| Courts                           | 1          |   |
| Dance Studio                     | 1          |   |
| Dentist                          | 11         |   |
| Employment agencies              | 5          |   |
| Family History Society           | 1          |   |
| Funeral Director                 | 2          |   |
| Gym                              | 3          |   |
| Hotels                           | 21         |   |
| Job Centres                      | 2          | Job Centre Plus; Skills Development Scotland                        |
| Library                          | 1          |   |
| Museums/Art centres              | 4          | Maritime Museum; Arts Centre & Theatre; Lemon Tree; Tolbooth Museum |
| MSP Office                       | 1          |   |
| Music School                     | 1          |   |
| Newspaper Office                 | 1          |   |
| NHS Health Care Village          | 1          |   |
| NE Scotland College              | 1          |   |
| Other Community etc              | 3          | Assessment Centre; Cyreneans; Credit Union                          |
| Pubs/Bars                        | 75         |   |
| Railway Station                  | 1          |   |
| Robert Gordon College/University | 1          |   |
| Solicitor                        | 1          |   |
| Theatre                          | 2          | Tivoli Theatre; His Majesty's Theatre                               |
| Tourist Information Centre       | 1          |   |
| Voluntary Service agencies       | 4          | Voluntary Services; Dementia Resources Centre; NE Sensory services  |

### Environmental Quality/Amenity

- 2.65 The physical structure of the City Centre is described in the ACC 2014 City Centre Health Check and has not materially changed between 2014 and 2018.
- 2.66 Large parts of the City Centre are of conservation importance with large numbers of listed buildings (see Figure 2.10) present and two conservation areas (Union Street and Bon Accord) cover the majority of the City Centre (see Figure 2.11).

**Figure 2.10: Listed Buildings in Aberdeen City Centre (source: PastMap)**



**Figure 2.11: Conservation Area coverage in Aberdeen City Centre (source: PastMap)**

2.67 There are limited areas of public open space within the City Centre including St Nicholas churchyard, Union Terrace Gardens, Union Square and Castlegate. However, the covered shopping malls, notably Union Square and Bon Accord, provide attractive indoor environments for shoppers and other visitors/users of the centre.

2.68 The key environmental issue for the City Centre is the impact of traffic along Union Street and, to a lesser extent, Guild Street/Market Street acting as both a barrier to pedestrian movement and adversely affecting amenity. The City Centre Masterplan identifies a number of proposals for improving the pedestrian environment including restricting Union Street to buses, taxis and local access only.

### Accessibility

2.69 The City Centre is served by a wide range of transport modes with excellent public transport accessibility including both bus and rail providing links to all parts of the City. Bus routes have direct access into the key parts of the centre including along Union Street and the bus station is immediately adjacent to Union Square (as is the railway station). The 2013 Report noted that there were over 4700 managed off-street parking spaces and in the region of 9000 on-street parking spaces in the City Centre.

2.70 The City Centre Masterplan identifies a number of proposals for car parking within the City Centre:

- Park and Ride: Maximise the potential offered by existing and proposed park and ride sites in order to reduce the overall number of vehicles entering the City Centre.
- Off-street parking - Maximise the potential offered by existing car park capacity by promoting a ring of car parks around the Urban Relief Route.

- New development parking: Apply stricter parking standards within the City Centre boundary to enforce 'zero parking' for new development.
- Aberdeen Car Club: The number of conventional as well as electric City Centre car club locations would be increased in order to allow for incidental car use for residents and businesses without the need for car ownership.

### Pedestrian Flows

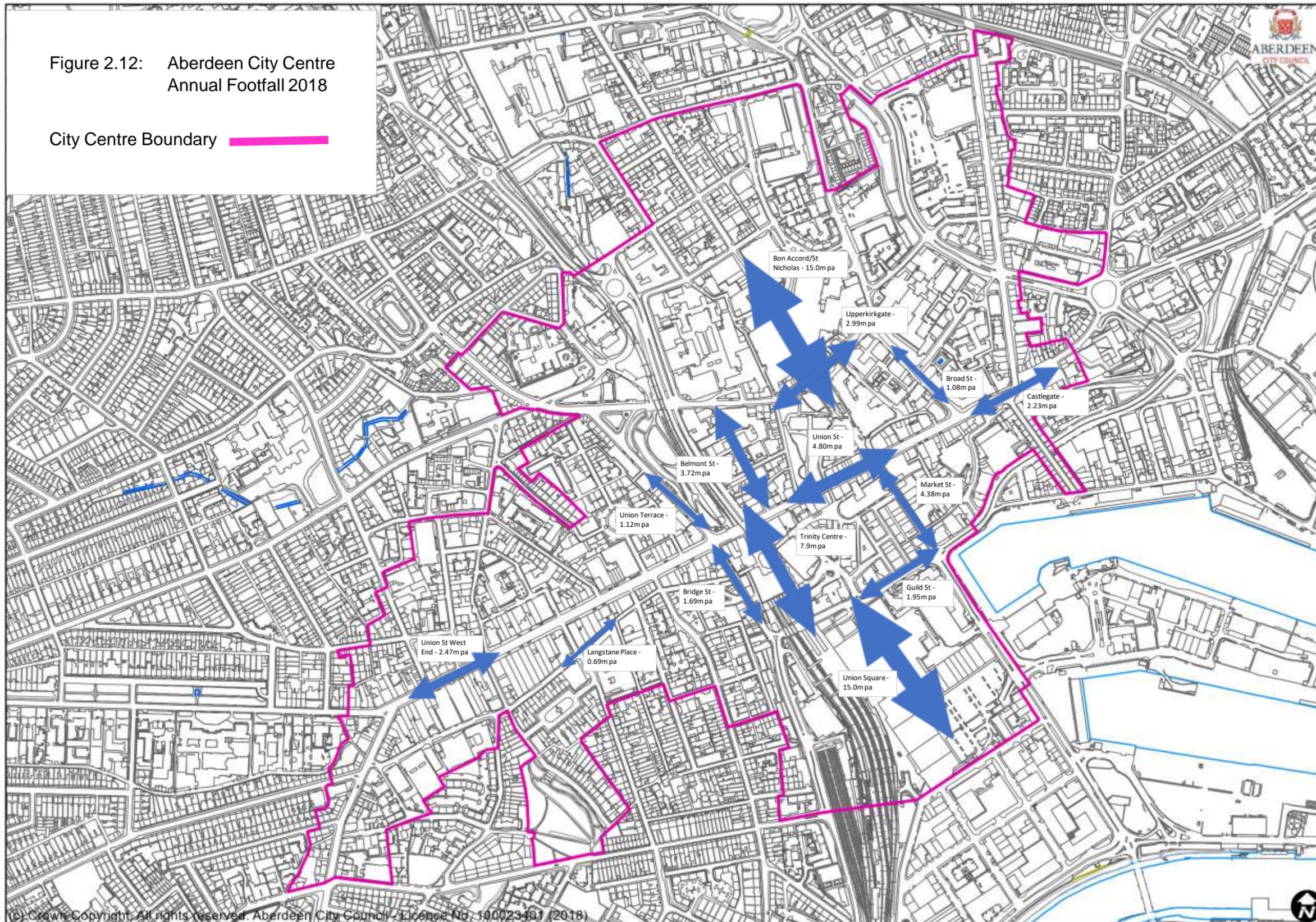
2.71 Figure 2.12 identifies footfall recorded for 2016 to 2018 (up to 18/12/2018 for locations other than Bon Accord and Union Square). The figures for the two major shopping centres are estimates published by the owners of the centres used for marketing purposes whereas all others are recorded automatically by Springboard on behalf the city council.

**Table 2.12: Aberdeen City Centre – Footfall since 2012**

| Total Annual Pedestrian Flows | 2016              | 2017              | 2018              | Change 2016-2018        |
|-------------------------------|-------------------|-------------------|-------------------|-------------------------|
| Belmont St                    | 4,088,755         | 4,036,123         | 3,717,205         | -9%                     |
| Bridge St                     | 1,709,240         | 1,653,661         | 1,690,957         | -1%                     |
| Broad St                      | 1,253,384         | 1,307,594         | 1,077,172         | -14%                    |
| Castlegate                    | 2,119,710         | 2,158,814         | 2,232,444         | 5%                      |
| Guild St                      | 2,134,893         | 2,071,202         | 1,949,494         | -9%                     |
| Langstane Place               | 795,908           | 710,151           | 694,380           | -13%                    |
| Market Street                 | 5,190,025         | 4,711,007         | 4,377,228         | -16%                    |
| Union Street                  | 5,648,791         | 5,291,267         | 4,802,951         | -15%                    |
| Union Street West End         | 2,586,460         | 2,520,087         | 2,472,395         | -4%                     |
| Union Terrace                 | 1,374,076         | 1,187,895         | 1,117,924         | -19%                    |
| Upperkirkgate                 | 4,291,034         | 4,103,854         | 2,992,794         | -30%                    |
| <b>Total</b>                  | <b>31,192,276</b> | <b>29,751,655</b> | <b>27,124,944</b> | <b>-13%</b>             |
|                               | <b>2012</b>       |                   | <b>2018</b>       | <b>Change 2012-2018</b> |
| Trinity Centre                |                   |                   | 7,900,000         |                         |
| Bon Accord/St Nicholas        | 17,500,000        |                   | 15,000,000        | -14%                    |
| Union Square                  | 19,000,000        |                   | 15,000,000        | -21%                    |

2.72 The Table shows that all locations, with the exception of Castlegate, have recorded declines in footfall. By way of comparison average changes in footfall across the UK recorded by Springboard for 2016-2018 are approximately -3% which would suggest that, for most locations in the City Centre and for the City Centre as a whole, footfall has declined at a significantly faster rate than in the UK.

Figure 2.12: Aberdeen City Centre – Annual Footfall 2018



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## Public Perceptions of the City Centre

2.74 No new surveys of public perceptions have been undertaken for this update. Surveys undertaken in 2013 are set out in the 2013 Report.

## Key Findings

2.75 The review of the City Centre identifies a number of key issues and changes that have occurred since 2013 which are relevant to the review of the strategy for the City Centre in the LDP Update:

- The City Centre continues to provide a very extensive range of retail, leisure, community and other services and facilities. It clearly remains the primary retail location serving the whole of Aberdeen City and Aberdeenshire as well as also serving communities in other authorities in NE Scotland.
- There has been a steady reduction in the number of shop units retailing goods. This continues a trend initially identified in 2004. Conversely, there has been a significant increase in the retail service units (i.e. including food/drink, health and beauty, personal financial services etc).
- There has been a significant increase in the numbers of vacant units within the City Centre – this has occurred when the average levels of vacancies across the UK has reduced slightly.
- There continues to be a gradual consolidation of the retail goods shops within the retail core as identified in the current LDP. Within this area the total number of multiple retailers has increased whereas the they have declined outwith the core.
- Footfall has reduced significantly across the City Centre, including in the prime retail frontages, since 2012. This decline has been significantly greater than identified for the UK as a whole.
- Major planning applications for extensions/new development linked to both Bon Accord and Union Square, together with agents identifying continuing demand for major brands seeking space within Aberdeen, would suggest continued market confidence in the future of the City Centre as a major retail location. However, further action needs to be taken to implement these proposals. Similarly, proposals have been submitted for the redevelopment/refurbishment of the Aberdeen Market. With the exception of the latest Aberdeen Market proposals, these proposals would, if implemented, provide a significant enhancement of the retail/leisure offer within the City Centre retail core.
- Services and entertainment activities are a critical component of the City Centre economy. These uses are prevalent throughout the City Centre and it is evident that demand for these will continue in the long term.

2.76 In the short term there remain uncertainties that reflect both local and national/international economic and political issues. The international oil-price has a direct impact on the fortunes of Aberdeen and, inevitably, it will affect demand for new retail and leisure floorspace in the City Centre. Although the oil-price has recovered from its recent low it is still well-below its peak in 2013. At the present time there are indications of possible economic slowdown in many parts of the world and, if this leads to a new recession, this will limit any further recovery in

the price of oil. Other short-term uncertainties include the effect of Brexit and the impact that this will have on the UK economy.

2.77 The review of market trends identifies that there is expected to be a reduction in the number of units operated by national and regional multiple operators. However, the size and dominance of Aberdeen City Centre as the regional centre serving the north east, would suggest that major retailers are likely to retain their presence within the City Centre. This will benefit the core retail area identified in the LDP but not benefit the peripheral areas including the west end of Union Street and north end of George Street. However, continued growth in leisure and other retail services will support continued demand for space in these areas together with specialty retail in areas where a high-quality environment can be created.

2.78 Consideration should also be given to the role and function of retail and retail service units along Union Street within the identified retail core. It is evident that there has been replacement of retail goods shops with services not only in the western parts of Union Street but also within that part of Union Street located within the Retail Core of the City Centre. This appears to reflect a combination of having older properties which are less suited to multiple retailer requirements than either Bon Accord or Union Square, less direct access to car parking and a comparatively poor pedestrian environment. Efforts need to be maximised to enhance the quality of the shopper/visitor experience in this part of the retail core:

- Environmental improvements and traffic management based on the proposals of the City Centre Masterplan are very important to ensure continued active frontages along this part of Union Street.
- Opportunities to increase pavement width in this area will support a diverse mix of uses including food and drink.
- However, short of redevelopment, which will be difficult to justify commercially, major national retailers are more likely to consider units in both Union Square and Bon Accord to be significantly more attractive as locations for their operations than premises along Union Street.

2.79 It follows that this part of Union Street, although clearly identified as a prime retail frontage should be expected to include a mix of activities and it is unrealistic to expect this area to return to being dominated by conventional retail shops. Rather, activities that support footfall and active street frontages, including combining both food and drink and retail, should be encouraged in this area both on upper/lower floors and also at street level. Indeed, this approach is consistent with that which the owners of the principal shopping centres have adopted in promoting food/drink/entertainment uses to complement retail floorspace as part of the overall offer to shoppers/visitors.

## Review of City Centre Retail Strategy

2.80 The review of the retail strategy set out in Volume 1 of this report identifies a number of elements that will support the protection and enhancement of the retail and related service functions (including entertainment, leisure and tourism roles) of the City Centre. This both reaffirms a number of the elements of the strategy identified in the 2013 Report and the 2017 LDP but also proposes a limited number of changes to this earlier strategy. Furthermore, proposals have also been identified in the City Centre Masterplan and the relationship of these proposals to the current Retail Strategy are also examined in this section.

2.81 The key elements of this retail strategy review for the City Centre are:

- Role of Aberdeen City Centre within the network of centres (“retail hierarchy” in the LDP).
- Defining the boundaries of the City Centre, including the Retail Core and remaining parts of the City Centre.
- Policies for development proposals within the City Centre including, where appropriate, differentiation between the retail core, prime retail frontages and other parts of the City Centre.
- Identification of potential development sites to support both (i) potential requirements to meet forecast additional retail requirements and (ii) sites/properties suitable for supporting other types of development to support other sectors within the City Centre (such as entertainment, leisure and tourism) and to encourage diversity and mix of uses within the City Centre.
- Support for additional interventions identified in the City Centre Masterplan that support and/or complement the promotion of retail, leisure and entertainment uses within the City Centre.

### Aberdeen City Centre – the Regional Centre

2.82 This Update of the retail study has confirmed that the City Centre continues to be the primary location for retail and related activity within the north east and acts as the regional centre for this part of the country. In terms of the network of centres the City Centre should continue as the defined Regional Centre. As such, through the application of the sequential approach, it should be the first location to be considered for all major retail and other town centre uses which generate significant footfall including leisure, entertainment, tourism, food and drink (as described in para 68 of Scottish Planning Policy 2014) and which serve a regional or sub-regional market area. This, therefore, supports a continuation of the policy approach described in full in the current Supplementary Guidance: Hierarchy of Centres prepared for the 2017 LDP.

2.83 This approach reflects each of the following:

- 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 importance of the City Centre in providing a wide choice of retail, leisure, entertainment, public services for the whole of Aberdeen City and Aberdeenshire and is also an important retail destination for expenditure from neighbouring local authority areas.

2.84 In terms of the application of the sequential approach this Update recommends a continuation of the approach identified in the 2013 Report:

- 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. This approach should apply to all development that generates significant footfall (as identified in para 68 of Scottish Planning Policy 2014) serving city- or region-wide markets.
- Within the City Centre there should be continued identification of a City Centre Retail Core which, for the application of the sequential approach for new city-wide or region-wide market retail floorspace, should be used to define the boundary of the City Centre retail area. This Retail Core should continue as the same as that identified in the 2017 LDP and similar to that recommended in the 2013 Report.
- Other important retail areas within the City Centre (including the west end of Union Street etc). In terms of the sequential approach these areas (along with the Retail Core) 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).
- Support for leisure, entertainment, cultural, tourism and related uses that generate a high footfall across the whole of the defined City Centre. These uses are of critical importance in supporting the vitality and viability of the City Centre as a whole and can complement primarily day-time activities (including shopping and office employment) through extending activities and footfall into the evening. In addition, these uses can complement retail through occupying space which is now less suited to modern retail requirements for example including the use of ground, upper and lower floors along Union street as well as the West End and other parts of the City Centre.

### **Boundaries of the City Centre**

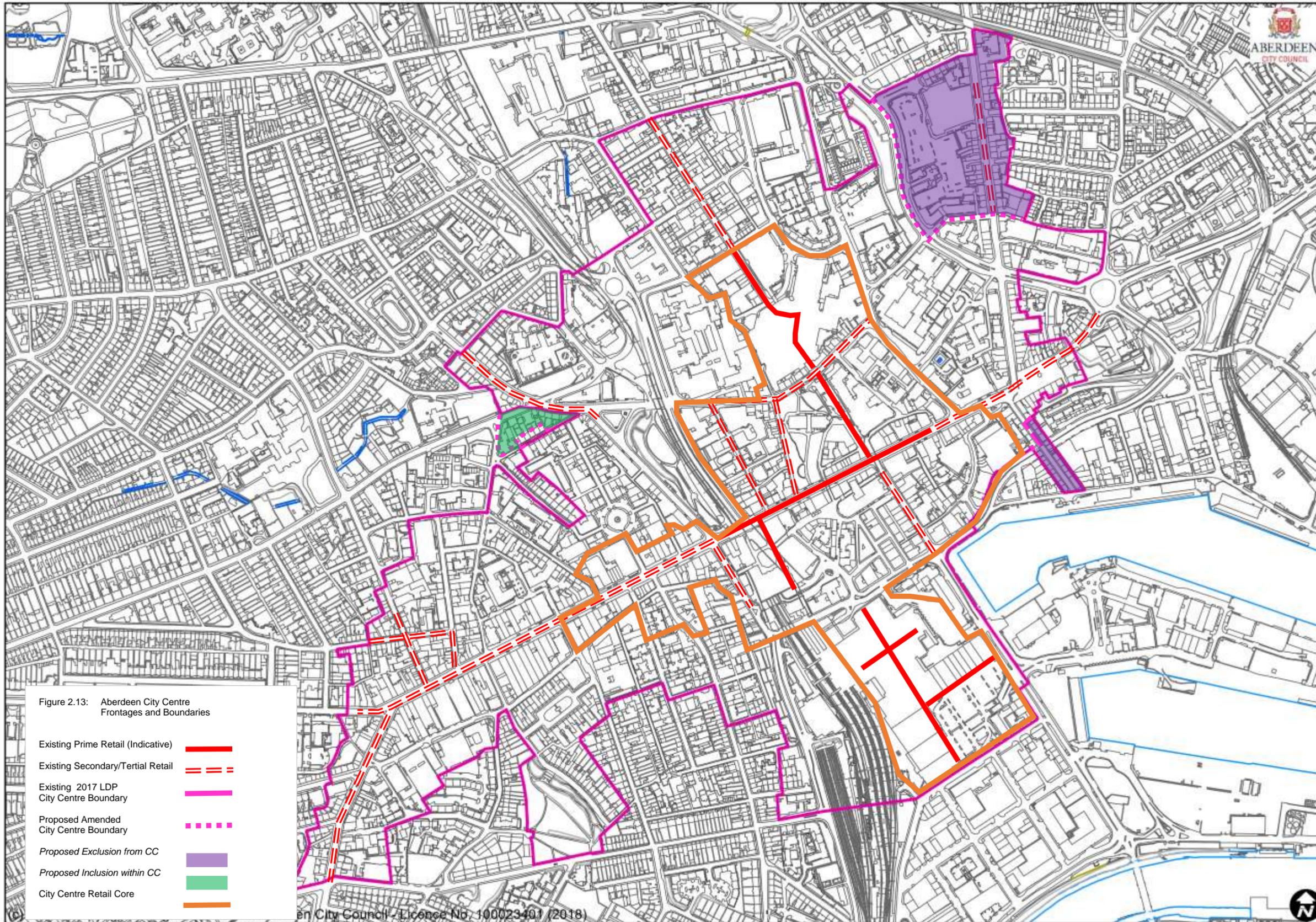
2.85 There are two key boundaries for the City Centre – the City Centre Retail Core and the boundary of the City Centre as a whole. As noted above it is recommended that the City Centre Retail Core should continue to be the same as that identified in the 2017 LDP. However, the analysis of retail and related service functions within the City Centre (see, for example Figure 2.2 on page 4 above) indicated that there are two areas that do not function in retail and related activities as part of the City Centre:

- The King Street area north of the Hotel/Bingo Club.
- The Marischal Street area.

- 2.86 In addition, a small area located on the south side of Rosemount Viaduct & Skene Street includes a terrace of retail, service and other facilities that are appropriate for inclusion within the City Centre consistent with the inclusion of other parts of Rosemount Viaduct within the City Centre boundary.
- 2.87 It is therefore recommended that, based on the analysis of retail and related functions set out in this report, the boundary of the City Centre should be amended as set out in Figure 2.13. It is emphasised that this recommendation is based only on an analysis of retail and related activities and Aberdeen City Council, when considering other relevant factors, may consider that the current boundary of the City Centre is appropriate.

### **King Street**

- 2.88 If it is accepted that the King Street area north of Buzz Bingo is to be excluded from the boundary of the City Centre then it is recommended that the Morrisons superstore, together with King Street to the north and south of the Morrisons store, should be identified as a neighbourhood centre in terms of the network of centres/retail hierarchy. This is in recognition of the fact that these shops, together with the Morrisons store, provide an important local shopping/services functions to the local residential area. The last household survey undertaken in 2013 indicated that the Morrisons store had trade draw from across a relatively wide part of the City and that it did not have a strong link to any particular local or district community suggesting that it would not be appropriate to identify this area as a District Centre at this stage. Nonetheless, if future household surveys identify that Morrisons develops a close relationship to that part of Aberdeen located to the north of the City Centre it would be appropriate to redefine this as a District Centre within the network of centres.



## Union Street

### *Diversity of Uses*

- 2.89 This Update has identified that, although located at the heart of the City Centre and midway between the major shopping malls, much of the space along Union Street is less well suited to modern retailer requirements than is found in either the Bon Accord, Union Square, or Trinity Centres. This is particularly the case for major national and international multiple retailers. Given the pressure that retailers are facing as a result both of slower rates of retail expenditure growth combined with increased competition from on-line retailers this will, in time, make it more difficult for property, even at (Union Street) ground floor level, to attract new retailers.
- 2.90 Union Street, is, nonetheless, at the heart of the City Centre. In the same way that prime retail in the City Centre has a strong north-south axis (from Bon Accord to Union Square) there is also a strong east-west access through the City Centre along Union Street, for a wide range of entertainment, leisure, tourism, cultural, public and related activities. These axes cross at the central part of Union Street (i.e. generally between Market Street and Bridge Street) which is, as a result, the heart of the City Centre. These uses can strongly complement retail and, as noted in Volume 1 of this report, the long-term growth prospects for these sectors is strong. The uses can also complement retail in that they, reflecting their wide diversity, are able to occupy a wide range of types of space including upper and lower floors as well as older ground-floor frontage properties. It is therefore considered important that, in addition to supporting retail in the city centre retail core, this should not prevent these additional leisure, entertainment and tourism uses also occupying space along Union Street, including in the area between Market and Bridge Streets. This approach to the central part of Union Street, will require both an evolution of existing policies supporting uses along Union Street together with strong interventions and investment that will support *both* retail and leisure/entertainment uses.

### *Union Street Frontages*

- 2.91 In terms of the 2017 LDP, Policy NC2 and Supplementary Guidance: Union Street Frontages seek to protect changes of use away from retail to other uses based on a series of principles and allowances that are set out in detail in the Supplementary Guidance. Given that the configuration of many units along Union Street is poorly suited to modern retailer requirements and that supporting leisure/entertainment (etc) is important to the vitality and viability of the City Centre, it is recommended that this policy and the SPG is reviewed to assess the extent to which a restrictive approach to non-retail development contributes to high vacancies in this area and limits the development of complementary leisure uses. At present the SG sets a minimum street frontage in this area to be 80% retail (south side) and 70% (north side). It is recommended that, should the proportion of vacant units increase in this area or there is demand for leisure and related uses within this area then lower minimum proportions should be considered. However, even if this minimum proportion is reduced, the other requirements set out in Policy NC2 should remain in place because it is very important that uses in this location contribute to the vitality of this area. A critical factor is maintaining a high proportion of space in “active” use – this could include cafes and restaurants, shops or other activities/uses which encourage direct interaction with pedestrians. Conversely proposals that do not encourage active frontages (for example major office frontage – although ground level entrances to upper/lower floor offices would be acceptable, or even major retail units that do not have window displays or similar) should be discouraged.
- 2.92 In general, support should be given to a diverse range of uses at street level as well as at upper and low levels throughout the length of Union Street to maximise the activity taking place along this key route. This Update

has identified significant potential for new leisure, entertainment and tourism-related uses that are especially well suited to a City Centre location and to conversions of older property including former retail units. It is recommended that these uses should be encouraged throughout the whole of the City Centre. Furthermore, at upper levels, additional residential development/conversions can support the mix of activities within the City Centre.

#### *City Centre Interventions*

2.93 For the City Centre, and Union Street in particular, to be able to continue attracting complementary leisure and entertainment uses, a high-quality environment needs to be provided that is attractive to pedestrians. At present Union Street remains dominated by vehicles and pavements are relatively narrow. To encourage diversity of use so that leisure and entertainment uses would be attracted to the core section of Union Street, support needs to be given to reducing traffic along this section of the road, increasing the width of pavements and other measures that will “calm” vehicles and reduce their impacts. A range of measures (“interventions”) have been proposed through the CCMP and this report recommends strongly that measures identified in the CCMP that support environmental improvements and traffic calming in the central part of Union Street are accorded the highest priority. If implemented these will significantly improve the attractiveness of Union Street for leisure and entertainment and related uses, improve the quality of open space in this area and will improve the commercial attractiveness of this part of Union street as a location for new investment. It will encourage cafes and related activities which would be able to occupy premises, both at ground and upper/lower floors, that are no longer attractive to retailers.

#### **Development Sites**

2.94 In the 2013 Report significant attention was given to identifying potential new retail development sites. These were identified in response to the forecast of rapid growth of retail expenditure. In this Update report it is evident that the scale of forecast growth in expenditure, although remaining significant, is notably less than was identified previously. This reflects a combination of factors including increased competition from internet-based retail, structural changes in the retail industry, and economic uncertainty including that associated with Brexit.

2.95 As a result, it is considered that there is a reduced requirement to identify new development sites but that those sites that have been promoted, particularly where planning applications have been submitted and approved, should be given full encouragement and protection from competing developments outwith the City Centre. Table 2.11 sets out a review of the sites identified in the 2013 Report, identifying the changes that have occurred since 2013, their current allocation in both the 2017 LDP and City Centre Masterplan and recommendations for their continued allocation in the emerging LDP.

2.96 The Table identifies four key sites in terms of potential retail and related development:

- Site D. George St/Crooked Lane – retain allocation as a major retail and related uses development site.
- Site F. 73-149 Union Street – Recommend monitoring of application of policy NC2 and SG Union Street Frontages to assess whether impact on vacancies and relax minimum frontage requirements if necessary (as described at para 2.91 above)

- 
- Site G: Aberdeen Market – retain identification of site as City Centre retail redevelopment opportunity as set out in OP67. It is recognised that a proposal for major new office floorspace at this location would support new spend and activity in this area but, given the significance of the location of the site and its potential for providing a direct link to Aberdeen Green and as part of the linkage between Union Street and Union Square it is considered that the current proposals for the site represent a lost opportunity to enhance retail and related activities within the City Centre.
  - Site J: Union Square – identify as a major retail and related uses site.

2.97 Planning applications that have been submitted for sites D and J indicate a maximum potential floorspace of approximately 50,000 sq m GFA (all uses).

2.98 Table 2.12 sets out a review of, and response to, other development proposals, or related initiatives relevant to retail and related uses in the City Centre, set out in the City Centre Masterplan.

**Table 2.11: Review of Potential City Centre Retail Development Sites**

| 2013 Report Site        | Changes/Developments since 2013   | 2017 LDP Allocation/<br>City Centre Masterplan<br>Recommendation                                  | Update: Conclusion and<br>Recommendation  |
|-------------------------|---|---|---|
| A. Denburn/Woolmanhill  | <p>Identified as a potential retail site if RGU/RGC Schoolhill site not forthcoming.</p> <p>Planning permission has been granted for mixed serviced accommodation/apartments/hotel developments (appn refs: 160112; 160801; 190124).</p> <p>Hotel development would support diversification of City Centre economy.</p> | <p>LDP Allocation OP81 identified for Mixed Use</p> <p>CCMP – CM05 – residential development.</p> | <p>Support allocation in LDP especially for hotel related development to support growth of tourism sector and diversity of uses in City Centre.</p>   |
| B. RGU – St Andrew St   | <p>Developed for Sandman Signature hotel.</p>   |   | <p>Site is now fully developed for a use that supports tourism and diversity in the City Centre. Continue support for any proposals to enhance this tourism use.</p>  |
| C. RGU/RGC - Schoolhill | <p>No significant changes since 2013 with RGC continuing to use site for school</p>   | <p>CCMP – EC07 Art Gallery – notes works to improve art gallery and Cowdray Hall</p>              | <p>Although site is very well located close to retail core (adjacent to Bon Accord and Academy Centres) there is no indication that the site would become available in the short-medium term.</p> <p>There remains a small possibility that the site could become available in the longer term in which case, with sensitive design, it could provide an opportunity for mixed use including retail that would support the City Centre.</p> |

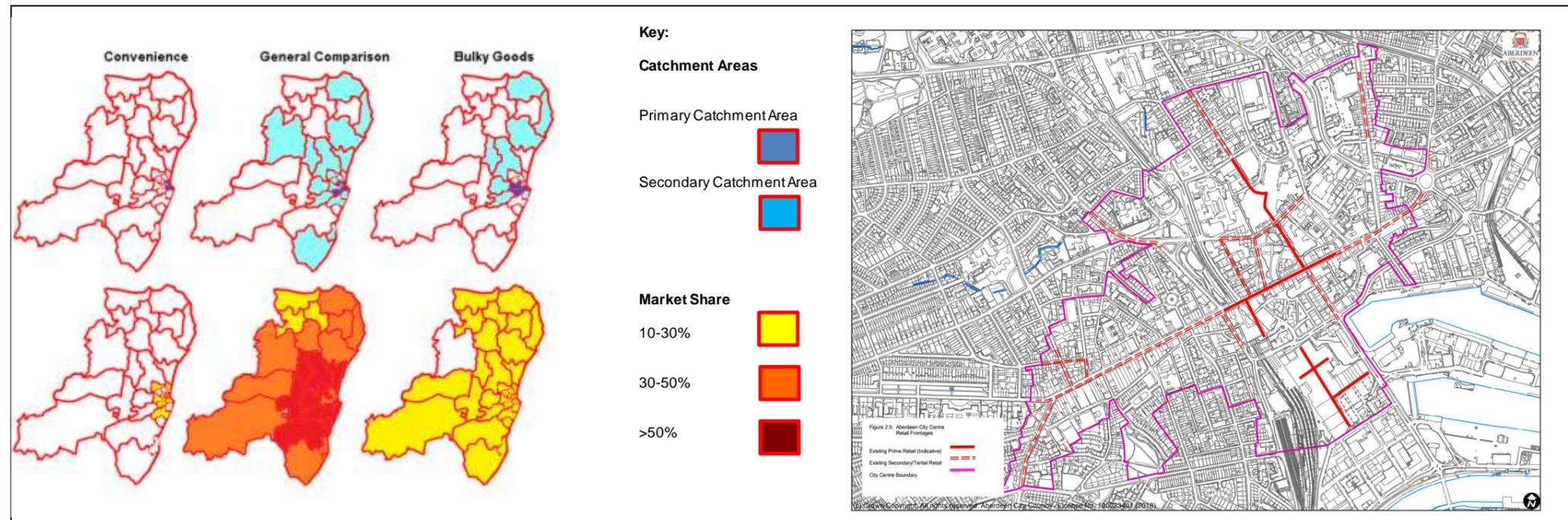
| Site                                    | Summary Appraisal  | 2017 LDP Allocation/<br>City Centre Masterplan<br>Recommendation              | Recommendation   |
|---|--|---|--|
| D. George St/Crooked Lane               | <p>Planning permission granted in principle for mixed retail and other commercial development. Site in same ownership at Bon Accord/St Nicholas Centres.</p> <p>Principal consents: 70353/PPP: Mixed use development comprising Class 1 (Shops), Class 2 (Professional services), Class 3 (Food and drink), Class 4 (Business), Class 7 (Hotels), flats, serviced apartments, access, services and all ancillary development and associated demolitions; 180985/DPP: Change of use from class 1 (shops) to class 10 (non-residential institutions) and alterations to shop front.</p> <p>Implementation of this consent would support retail core of City Centre. Development should therefore be protected from competing developments outwith the City Centre.</p> | LDP Allocation OP102 for retail development.                                  | <b>Recommend: Continue to identify as major retail development site.</b>   |
| E. St Nicholas House (Marischal Square) | Site redevelopment has been completed (consent 140698) – for mixed commercial (offices/hotel) but Class 3 uses at ground floor.  | LDP allocation OP91 for mixed use.<br><br>CCMP: Project EC01 Marischal square | No longer identify as development site   |
| F. 73-149 Union Street                  | No significant applications for these properties except insofar as affected by current applications for redevelopment of the Aberdeen Market (with two access links to Union Street through this site).  | LDP OP96 identified for retail use.   | <p>No proposals for redevelopment and site affected by complex ownership as well as proposals for adjacent Aberdeen market.</p> <p>To suit modern retail requirements much of this block would require redevelopment/reconfiguration but properties as suited to conversion to a range of commercial leisure/entertainment and related uses if retail not viable.</p> <p><b>Recommend monitoring/review of application of policy NC2 and SG Union Street Frontages to assess whether impact on vacancies and relax minimum frontage requirements if necessary.</b></p> |

| Site                           | Summary Appraisal   | 2017 LDP Allocation/<br>City Centre Masterplan<br>Recommendation   | Recommendation  |
|--------------------------------|---|--|---|
| G. Aberdeen Market             | <p>New planning application submitted for full redevelopment of Aberdeen Market (including vacant BhS space) for office led scheme with limited retail and other Class 3 and related uses. Proposal includes some improvements to public open space at Aberdeen Green.</p> <p>Although major office use of the scale proposed is consistent with SPP para 68 redevelopment of this site would represent significant loss of retail space within the city and loss of market stalls which contribute to the variety of retail offer within the City Centre. Proposals as submitted would not support retail function and not realise an opportunity to enhance the linkages between Union Street and Union Square/Guild Street and represent, therefore, a missed opportunity in terms of City Centre retail and related functions.</p> <p>P App ref: 190312/DPP Major development consisting of demolition and redevelopment of the existing site to form a mixed use office-led development (Class 4) (circa 18,000 sqm), with retail (Class 1), financial and professional (Class 2), food and drink (Class 3), public house (Sui Generis) and assembly and leisure (Class 11) uses (circa 750sqm), landscaping, public realm, car parking and associated works</p> | <p>LDP site OP67 for qualitative retail/mixed use with improved pedestrian access.</p> <p>CCMP Project CM06. Recommends that the site creates opportunity for a mix of uses including retail enhancing overall vibrancy.</p> | <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><b>Recommend: retain identification of site identify as City Centre retail redevelopment opportunity as set out in OP67.</b></p> |
| H. Virginia Street/Regent Quay | <p>No significant planning applications for this area.</p> <p>Site is poorly related to remainder of City Centre although has the potential for some leisure/entertainment activities. If City Centre boundary is amended (as recommended) site would be located outwith defined City Centre.</p>   | <p>CCMP Project CM04. Proposes a "more urban mix of uses" including residential.</p>   | <p>Not identify as a significant retail/related development site.</p>   |
| I. Union Square South          | <p>Planning application for 210 bed hotel development on part of site (app ref 150645) granted end of 2018. No other major developments.</p> <p>Area has significant constraints and multiple ownership. Union Square has identified potential for extension over existing car park to the north of this site.</p>  | <p>LDP identifies area as a specialist Employment Area (policy B2).</p> <p>CCMP projects EC02 (North Dee Business Quarter) and EC04 (Global Energy Hub)</p>  | <p>Not identify as a significant retail/related development site.</p>   |

| Site             | Summary Appraisal  | 2017 LDP Allocation/<br>City Centre Masterplan<br>Recommendation | Recommendation  |
|------------------|--|--|---|
| <b>NEW SITES</b> |  |  |   |
| J. Union Square  | <p>Planning permission granted for major extension of Union Square including development of the surface level car park: app refs 151362, 151363, 151439, 152005:</p> <p><i>Extension to Union Square shopping centre to provide additional mixed use floorspace - to potentially include retail (class 1), food and drink (class 3), hotel (class 7), assembly and leisure (class 11); car parking and associated infrastructure.</i></p> <p>No indications when the conditions would be discharged nor implementation of the consent. However, proposal would, similar to the extension proposed for Bon Accord at George Street/Crooked Lane and provide a significant opportunity to enhance the retail and related functions of the City Centre which should be supported and protected from inappropriate competing developments outwith the City Centre.</p> | LDP – Located in City Centre Retail Core                         | <b>Recommend – identification of site as major retail and related development opportunity within the City Centre Retail Core.</b> |

**Table 2.12: Review of City Centre Masterplan Projects Relevant to Retail**

| CCMP Project                                       | Description of Project   | Comment/Response   |
|--|--|--|
| EC08 New Hotel Development                         | General support for increased leisure-based hotels in Aberdeen   | Agree that additional hotels will increase diversity and vitality within the City Centre and increase expenditure on retail and leisure/entertainment activities. Hotels can be flexible in terms of size and ability to be accommodated in existing buildings.  |
| CM02 Queen Street                                  | Potential for residential-led redevelopment if/when relocation of public sector uses   | Queen Street would not be suitable for retail and related uses (apart from limited entertainment) therefore project does not conflict with retail strategy in this report.   |
| CM04 Regent Quay                                   | Proposes increased residential development or mixed use.   | Regent Quay is less suitable for retail and related uses (apart from limited entertainment) therefore project does not conflict with retail strategy in this report.   |
| CM06 Aberdeen Market                               | Supports redevelopment for mix of uses and to improve setting of The Green.  | Redevelopment for a genuine mix of uses can be acceptable provided that retail is a significant component otherwise redevelopment would be lost opportunity. The Market also forms a key location between Union Street and Union Square/Guild Street and retail/leisure etc would support and strengthen this linkage. Current planning application fails to realise this opportunity. |
| CM07 Bon Accord                                    | Notes proposals for increased leisure uses.  | This retail strategy supports proposals for the extension of Bon Accord.   |
| CM09 St Nicholas                                   | Identifies potential for increasing access through St Nicholas outwith shopping hours and creation of arcade plus Winter Garden  | Support proposal in principle but this should not compromise St Nicholas as a prime location for major retail within the City Centre.  |
| CM10 Trinity Centre                                | Identifies short term opportunities linked to redevelopment of Atholl House and long-term potential for comprehensive enhancement.   | Support for short term aspirations for improving access and for Trinity Centre to provide an attractive link between Guild Street and Union Street.  |
| CM12 Union Square                                  | Considers that current proposals for extending shopping space should not compromise permeability of the City Centre with a strong north-south pedestrian linkage through the site. | As with Bon Accord, Union Square is a key component of City Centre retail which should be recognised. Support the principle of increasing permeability.  |
| EN02 Guild Street                                  | Removal of car traffic from Guild Street and one way for buses.  | Support proposals which would enhance pedestrian linkages towards Union Street   |
| EN05 Union Street                                  | Removal of private vehicles from Union Street between Bridge St and Castlegate   | Support proposals which would significantly enhance pedestrian environment encouraging mix of uses and activities at street level.   |
| EN06 Upperkirkgate/Schoolhill                      | Removal of all traffic from central area of Upperkirkgate  | Support proposals in principle for improving environment but need to protect ability of businesses to service/access as necessary.   |
| EN07 Castlegate                                    | Provision of "central civic space"   | Support proposals which would increase attractiveness of Castlegate for leisure, entertainment and specialist retail.  |
| EN04 Rose Street etc                               | High quality streetscape scheme.   | Support proposals which would enhance specialist retail/leisure function of this area.   |
| IN01 Walkable Aberdeen                             | Rerouting non-essential traffic from central Aberdeen – enhancing attractiveness of City Centre for pedestrians  | Support proposals for improving environment for pedestrians along Union Street and removing non-essential vehicles from Union Street   |
| IN06 Bus Priority Infrastructure -Bus only streets | Bus Priority Infrastructure – Bus only streets and corridors   |  |



**Floorspace and Turnover 2018**

|                    | No.        | Convenience  |              |                 | General Comparison |              |                 |               | Bulky Goods   |                |               | All Goods     |                 |          |        |             |
|--------------------|------------|--------------|--------------|-----------------|--------------------|--------------|-----------------|---------------|---------------|----------------|---------------|---------------|-----------------|----------|--------|-------------|
|                    |            | GFA Sq M     | NFA Sq M     | Turnover £/Sq 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 | 393        | 33056        | 20940        | 95.3            | 154005             | 99949        | 710.3           | 14966         | 9767          | 55.2           | 202027        | 130656        | 860.8           |          |        |             |
| Retail Services    | 436        |              |              |                 |                    |              |                 |               |               |                |               |               |                 |          |        |             |
| Vacant             | 83         |              |              |                 |                    |              |                 |               |               |                |               |               |                 |          |        |             |
| <b>Total</b>       | <b>912</b> | <b>33056</b> | <b>20940</b> | <b>£95.32m</b>  | <b>154005</b>      | <b>99949</b> | <b>£710.27m</b> | <b>254760</b> | <b>509425</b> | <b>£55.21m</b> | <b>330028</b> | <b>130656</b> | <b>£860.80m</b> |          |        |             |

| 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><b>Strengths:</b> 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; proposals for</p> <p><b>Weaknesses</b></p> <p>Weaknesses: Limited food retail offer, adverse impacts of traffic on amenity; pedestrian congestion recent increase in vacancies; limited actual investment in recent years</p> <p><b>Others</b></p> <p>2013 surveys of perception of centre indicate: <b>Good</b> for choice of shops for clothing and footwear; and as a good place to combine trips for a range of purposes. <b>Adequate-good</b> 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. <b>Poor</b> for easy and cheap to park.</p> <p>Vacancies are marginally above national average (13.2% by number of units in 2018 and 8.3% by floor area).</p> <p>2012 surveys identified 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><b>Summary:</b> generally strong indicators of vitality and viability but key indicators have <i>declined</i> since 2012.</p> |  | Planning Policy Approach | Protection and promotion of significant new retail floorspace |  |
| 2013           | 75   | 385  | 365                       | 66     | 891   | £841.90m |                          |  | Proposed Retail Floorspace   |                          |   |  |
| 2018           | 68   | 325  | 436                       | 83     | 912   | £860.80m |                          |  | <p><b>Commitments</b></p> <p>Major proposals for expansion of Bon Accord and Union Square and conversion of Bon Accord upper floor retail to Class 1 use</p> <p><b>Proposals</b></p> |                          |   |  |
|                |      |      |                           |        |       |          | change 2013-18           | +2%  |  |                          |   |  |
|                |      |      |                           |        |       |          | change 2004-18           | +38%   |  |                          |   |  |

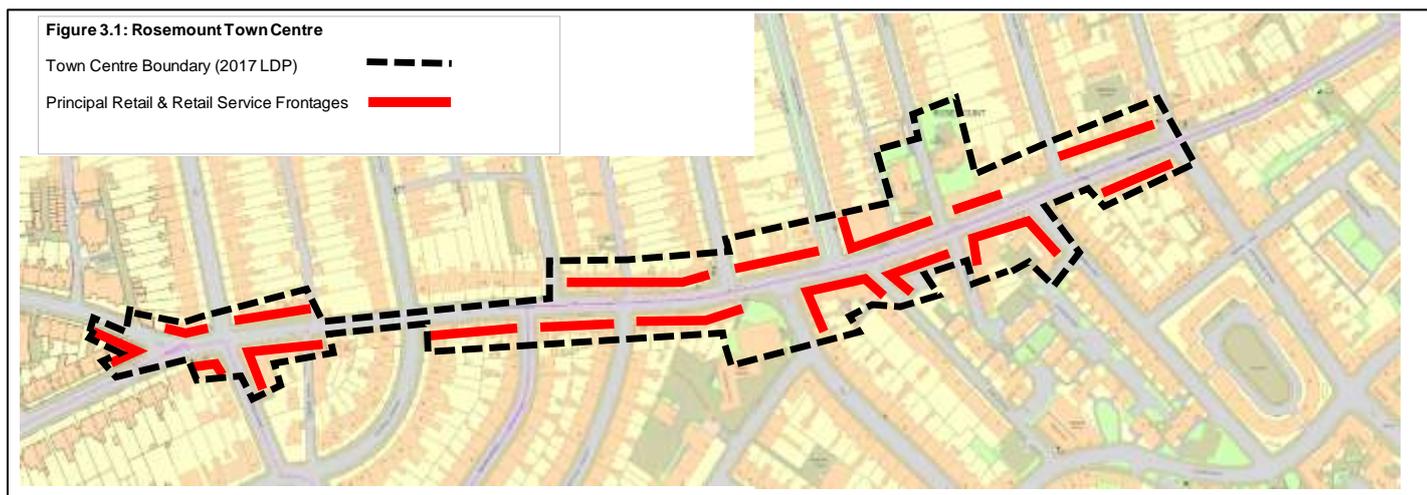
### 3 Aberdeen – Town Centres

#### Rosemount Town Centre

##### Description and Health Check

- 3.1 Rosemount comprises a discontinuous shopping area running along both sides of Rosemount Place to the north west of the City Centre. It is identified as a town centre in the current LDP.

**Figure 3.1: Rosemount Town Centre**



##### Catchment Area

- 3.3 The primary catchment area is identified to comprise a combination of Zone 27 for convenience and general comparison goods shops although Zone 30 was also identified as part of the primary catchment area for bulky goods. The secondary catchment area for retail goods was identified to comprise parts of Aberdeen including Zones 29N and 30 for convenience goods but slightly wider for bulky comparison goods (including Zones 25, 28 and 29S for bulky goods). Market penetration rates within the catchment areas were, however, low. For convenience goods market share was only 8% in the primary catchment area and was lower for other goods categories and in the secondary catchment areas.

##### Range Retail Offer and Operators

- 3.4 Table 3.1 sets out the results of the various surveys of retail and retail services units undertaken for Rosemount since 2004.

**Table 3.1: Rosemount – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2004 | 19           | 38   | 21           | 2      | 80    | £15.45m      |
| 2012 | 10           | 33   | 41           | 4      | 88    | £12.34m      |
| 2018 | 9            | 28   | 40           | 10     | 87    | £13.56m      |

3.5 The Table shows that the reduction in the number of retail goods shops that was identified between 2004 and 2012 has continued to 2018. The number of retail service units has remained at a similar level to that identified in 2012 but there has been a significant increase in the number of vacancies. Retail goods turnover of the centre is similar (slightly higher) than identified in 2012 but still below that identified 2004.

3.6 Three retail goods operators are national multiples (this represents only 8% of all retail goods shops) and all of which are convenience retailers. This is a low proportion and confirms that Rosemount continues to comprise principally independent retail operators. Figure 3.1 shows the location of the principal frontages in Rosemount.

#### *Additional Services and Facilities*

3.7 Rosemount provides a reasonable range of additional facilities and services to the public:

- Dentists (2)
- MSP/MP Office (2)
- Clinic
- Employment agency
- Accountant
- Community Centre
- Music school
- Other community organisations (2)
- Police

#### *Occupier Demand and Activity*

3.8 Since 2013 there have been a small number of applications for change of use or conversion of retail units to other non-retail uses.

#### *Rents and Yields*

3.9 Properties currently being marketed indicate an average rental level of approximately £250-300 psm for retail and close to £200 psm for Class 3 use.

#### *Shopper/Household Survey Information*

3.10 The 2013 Report identified that there were above average levels of satisfaction for food shopping but below average satisfaction for non-food shopping. There were generally average levels of satisfaction for ease of

access to the centre except for car parking. There was slightly above average level of satisfaction with Rosemount as a place to shop.

#### *Vacancy Rates*

- 3.11 The vacancy rate in 2018 is 11% by number of units and 12% by floorspace. Although this is about average for Scotland at the current time this is significantly higher than identified for both 2012 (4.5%) and 2004 (2.5%).

#### *Accessibility*

- 3.12 One bus route (First service 3) passes along Rosemount Place linking to the City Centre and Mastrick. Generally, there is good on-street parking.

#### *Environment*

- 3.13 The centre presents a generally attractive environment but, in places, is affected by narrow pavements. Within the centre there are a small number (4) listed buildings and the whole of the centre is located within the Rosemount and Westburn Conservation Area.

#### *Summary*

- 3.14 In overall terms the centre provides a reasonably wide retail offer and a good range of retail service but limited non-retail functions. In overall terms it is considered to have reasonably average-strong indicators of vitality and viability but a key change is the significant increase in vacancies since 2012.
- 3.15 Although very different in character from the other District Centres identified in Aberdeen it could be considered that Rosemount is more accurately described as a District Centre rather than a Town Centre reflecting the limited range of retail and non-retail facilities within the centre. However, in the context of centres within Aberdeen, Rosemount (along with Torry) is unique comprising a relatively large number of retail and retail service units together with a range of non-retail facilities. It is, therefore, considered that, along with Torry, Rosemount should continue to be identified as a Town Centre in the network of centres.

#### **Prospects and Key Issues**

- 3.16 The prospects for Rosemount remain similar to those identified in the 2013 report. 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 also 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. Given that the retail stock comprises older premises, often poorly suited to modern retail requirements, it is unlikely that Rosemount will attract significant new retail floorspace but its location, character and relative proximity to the City Centre could support small numbers of specialist/niche retailers. Rosemount is expected to be attractive to retail service providers and other facilities and services, including leisure, serving this part of Aberdeen.

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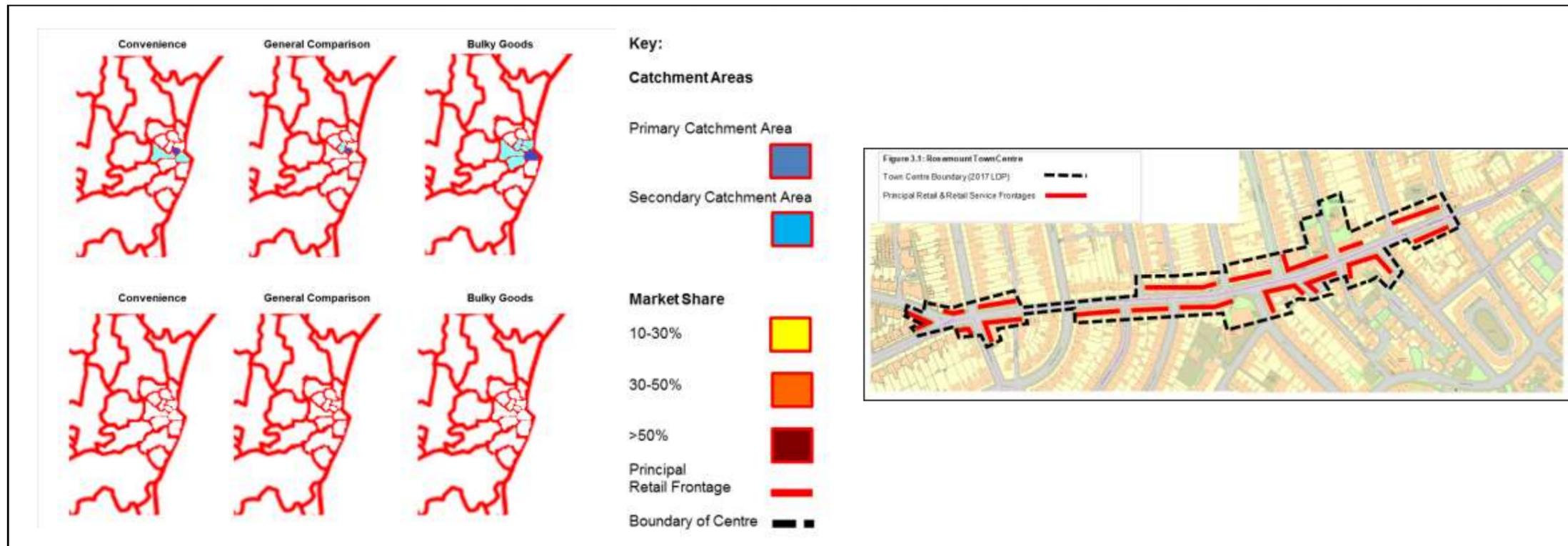
## Review of Retail Strategy

3.17 Based on the above review it is recommended that:

- Continued identification of Rosemount centre as a **town centre** in the retail network.
- Policies should protect Rosemount town centre from adverse impact from retail proposals.
- No identification of significant additional retail floorspace for the centre.
- Encouragement of diverse town centre uses within the centre including leisure, entertainment, food and drink uses.

3.18 Rosemount remains a small town centre with a 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 range 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. It is effective in meeting day-to-day shopping needs of the local area together with a relatively 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. The centre's unique character is well suited to supporting non-retail town centre uses.

3.19 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.



**Floorspace and Turnover 2013**

| Floorspace and Turnover 2018 |           | Convenience |             |                    |               | General Comparison |             |                    |               | Bulky Goods |             |                    |               | All Goods   |             |                    |                |
|------------------------------|-----------|-------------|-------------|--------------------|---------------|--------------------|-------------|--------------------|---------------|-------------|-------------|--------------------|---------------|-------------|-------------|--------------------|----------------|
|                              | No.       | GFA<br>Sq M | NFA<br>Sq M | Turnover<br>£/Sq M | £m            | GFA<br>Sq M        | NFA<br>Sq M | Turnover<br>£/Sq M | £m            | GFA<br>Sq M | NFA<br>Sq M | Turnover<br>£/Sq M | £m            | GFA<br>Sq M | NFA<br>Sq M | Turnover<br>£/Sq M | £m             |
| Retail Goods Shops           | 37        | 2116        | 1375        |                    | 5.56          | 1801               | 1171        |                    | 6.53          | 837         | 544         |                    | 1.47          | 4754        | 3090        |                    | 13.56          |
| Retail Services              | 40        |             |             |                    |               |                    |             |                    |               |             |             |                    |               | 2622        |             |                    |                |
| Vacant                       | 10        |             |             |                    |               |                    |             |                    |               |             |             |                    |               | 1003        |             |                    |                |
| <b>Total</b>                 | <b>87</b> | <b>2116</b> | <b>1375</b> |                    | <b>£5.56m</b> | <b>1801</b>        | <b>1171</b> |                    | <b>£6.53m</b> | <b>837</b>  | <b>544</b>  |                    | <b>£1.47m</b> | <b>8378</b> | <b>3090</b> |                    | <b>£13.56m</b> |

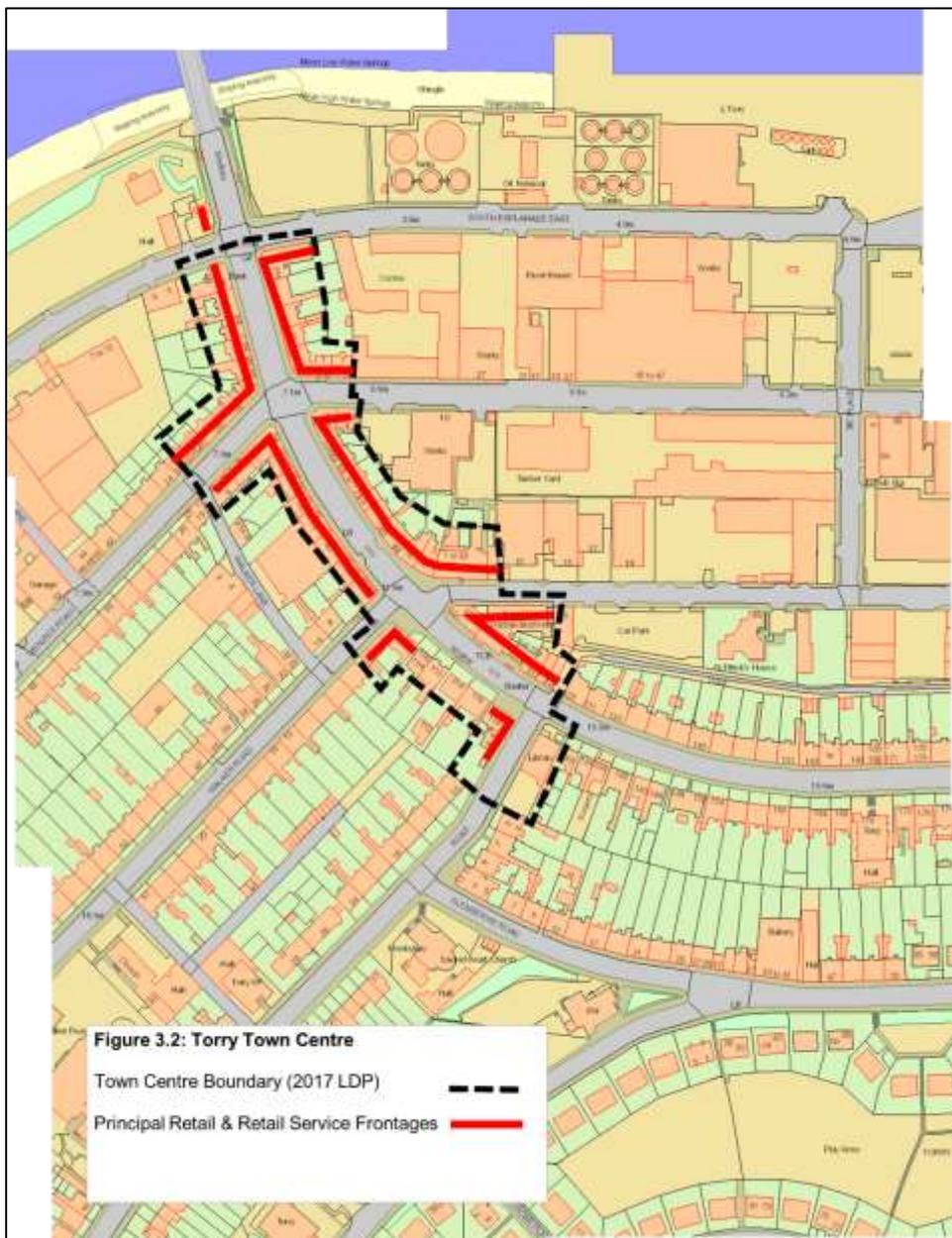
| Recent Changes |      |      |              |        |       |             | Retail Goods  |                                   | Vitality and Viability Summary |             | Retail Strategy Summary |  |
|----------------|------|------|--------------|--------|-------|-------------|---|-----------------------------------|--------------------------------|-------------|-------------------------|--|
| Year           | Conv | Comp | No. of Units |        |       | Turnover £m |   |                                   |                                |             |                         |  |
|                |      |      | Ret Services | Vacant | Total |             |   |                                   |                                |             |                         |  |
| 2004           | 19   | 38   | 21           | 2      | 80    | £15.45m     | 2012 surveys identified 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.<br><br><b>Strengths:</b> Ease of movement within centre; environmental quality of centre; reasonable range of retail offer; strong independent sector; public transport accessibility.<br><br>Vacancies have increased significantly and are close to national average (11% by number of units and 12% by floorspace in 2018).<br><br><b>Weaknesses:</b> Limited food retail offer (no major main food shop); limited multiples; limited non-retail facilities; adverse impacts of traffic on amenity; lack of car parking.<br><br><b>Summary:</b> although the centre has a relatively limited retail offer it exhibits generally average-strong indicators of vitality and viability. Has significantly weakened since 2013. | <b>Centre Classification</b>      |                                | Town Centre |                         |  |
| 2013           | 4    | 0    | 40           | 10     | 54    | £12.34m     |   | <b>Planning Policy Approach</b>   |                                | Protection  |                         |  |
| 2018           | 8    | 28   | 40           | 10     | 87    | £13.56m     |   | <b>Proposed Retail Floorspace</b> |                                |             |                         |  |
|                |      |      |              |        |       |             |   | <b>Commitments</b>                |                                |             |                         |  |
|                |      |      |              |        |       |             | <b>Proposals</b>  |                                   |                                |             |                         |  |
|                |      |      |              |        |       |             |   |                                   |                                |             |                         |  |

## Torry

### Description and Health Check

3.20 Torry comprises shops and related facilities located on both sides of Victoria Road and along limited sections of adjoining streets. It is identified as a town centre in the current LDP.

Figure 3.2: Torry Town Centre



### Catchment Area

3.21 The primary catchment area was identified to comprise Zone 30 for all goods categories without any identifiable secondary catchment area. Previously a secondary catchment for convenience goods extended into Zone 32 but the relocation of the Lidl store at Wellington Road combined with the existing Tesco has limited the potential

market for Torry from Zone 32. Market penetration rates within the catchment areas were, however, low. For convenience goods market share was only 8% in the primary catchment area and was lower for other goods categories.

#### *Range Retail Offer and Operators*

3.22 Table 3.2 sets out the results of the various surveys of retail and retail services units undertaken for Torry since 2004.

**Table 3.2: Torry – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2004 | 13           | 17   | 18           | 7      | 55    | £9.96m       |
| 2012 | 8            | 12   | 21           | 7      | 48    | £5.92m       |
| 2018 | 8            | 10   | 25           | 4      | 47    | £8.89m       |

3.23 The Table shows that the significant rate of reduction in the number of retail goods shops that was identified between 2004 and 2012 has not continued to 2018 – the number of convenience shops has remained the same as 2012 and the reduction in comparison goods shops was -2. The number of retail service units has continued to increase and there has been a significant decrease in the number of vacancies. Retail goods turnover has, to an extent recovered to be higher than identified in 2012 although it is still 11% lower than in 2004.

3.24 Only one retail goods operator is a national multiple (this represents only 6% of all retail goods shops) which is a convenience retailer. This is a low proportion and confirms that Torry continues to comprise principally independent retail operators.

#### *Additional Services and Facilities*

3.25 Torry provides a limited range of additional facilities and services to the public:

- Library
- Church/Place of Worship
- Pubs/Bars (2)
- MSP/MP Office
- Public Halls (Victoria Halls)
- Other community organisations (2)
- Police

#### *Occupier Demand and Activity*

3.26 Since 2013 there have been minimal applications for development/redevelopment in Torry.

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*Rents and Yields*

- 3.27 Limited information is available for rents in Torry at the present time. Currently 52 Victoria Road is being marketed – the property comprises ground floor and basement accommodation and the average rent being sought is only £72 psm. This is probably significantly lower than average rents for ground floor properties in this location due to the extensive basement.

*Shopper/Household Survey Information*

- 3.28 The 2013 Report identified that there were average levels of satisfaction for food shopping but below average satisfaction for non-food shopping. There were generally above average levels of satisfaction for ease of access to the centre. There was slightly below average level of satisfaction with Torry as a place to shop.

*Vacancy Rates*

- 3.29 Table 12 identifies 4 vacant units which equates to a vacancy rate of 8.5% by number of units and 5% by floor area. This is the lowest vacancy rate identified since 2004 and is below the current average for Scotland.

*Accessibility*

- 3.30 Two bus routes (First service 12 and Stagecoach service 59) pass along Victoria Road linking Torry to the City Centre. Generally, there is reasonable on-street parking.

*Environment*

- 3.31 The centre has a mixed environmental quality – some buildings are attractive and well maintained but others less so. Victoria Road can be busy which can adversely affect pedestrian amenity and act as a barrier to movement for pedestrians. There are two listed buildings located at the junction of Sinclair Road and Victoria Road.

*Summary*

- 3.32 In overall terms the centre provides a limited retail offer and range of additional services and facilities. The reduction in vacancies since 2012 is a positive sign of improvement in the centre. Given the limited range of retail and other facilities available within the centre consideration should be given to categorising the centre as a District Centre rather than Town Centre. However, as noted for Rosemount, the unique character of the centre within Aberdeen indicates that it is appropriate for Torry to remain identified as a Town Centre within the network of centres.

**Prospects and Key Issues**

- 3.33 Notwithstanding the relative improvement of Torry compared to 2012 the centre faces similar challenges to those identified previously. The catchment area served by Torry is geographically limited and its potential is constrained by its proximity to the City Centre. Population growth within this area is expected to be modest with the result that available expenditure growth for convenience goods will be limited 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

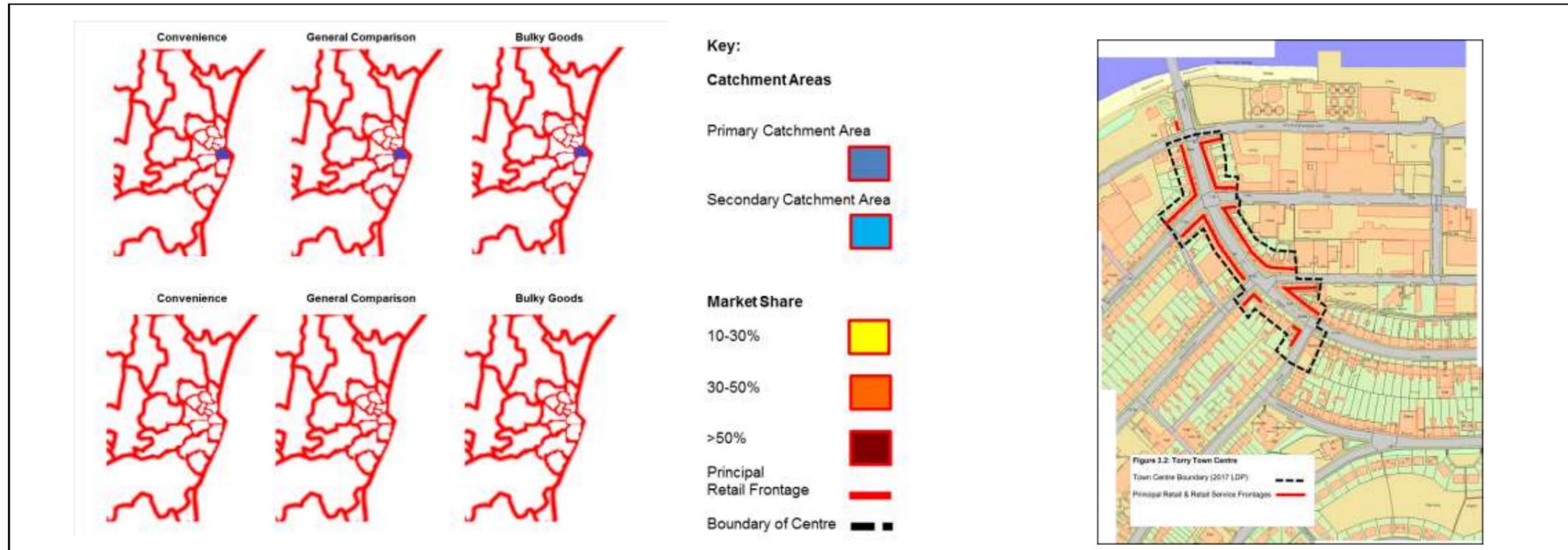
markets. As a result, the retail goods turnover of Torry is expected to remain flat or decline. As with Rosemount the types of property within Torry are less attractive to national multiples but could attract a small number of independent and specialist retail and would be attractive to retail services. These factors would support encouraging further diversification to other, non-retail, town centre uses within the centre.

### Review of Retail Strategy

3.34 Torry is a relatively small centre and does not comfortably fit with the definition of “town centre” as set out in SPP and related guidance. However, its unique character (along with Rosemount) means that it is distinctly different from other retail locations found in Aberdeen outwith the City Centre with a range 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 should continue to be identified as a Town Centre rather than District Centre in the retail network. It is effective in meeting day-to-day shopping needs of the local area together with a relatively 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. Torry is well suited to supporting non-retail town centre uses.

3.35 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. Based on the above review it is recommended that:

- Continued identification of Torry as a **town centre** in the retail network.
- Policies should protect Torry town centre from adverse impact from retail proposals.
- No identification of significant additional retail floorspace for the centre.
- Encouragement of diverse town centre uses within the centre including leisure, entertainment, food and drink uses.



**Floorspace and Turnover 2013**

| Floorspace and Turnover 2018 |           | Convenience |             |                    | General Comparison |             |             | Bulky Goods        |               |             | All Goods   |                    |               |
|------------------------------|-----------|-------------|-------------|--------------------|--------------------|-------------|-------------|--------------------|---------------|-------------|-------------|--------------------|---------------|
|                              | No.       | GFA<br>Sq M | NFA<br>Sq M | Turnover<br>£/Sq M | £m                 | GFA<br>Sq M | NFA<br>Sq M | Turnover<br>£/Sq M | £m            | GFA<br>Sq M | NFA<br>Sq M | Turnover<br>£/Sq M | £m            |
| Retail Goods Shops           | 18        | 1515        | 985         | 5.75               | 5.75               | 975         | 634         | 2.94               | 2.94          | 95          | 62          | 0.20               | 0.20          |
| Retail Services              | 25        |             |             |                    |                    |             |             |                    |               |             |             |                    |               |
| Vacant                       | 4         |             |             |                    |                    |             |             |                    |               |             |             |                    |               |
| <b>Total</b>                 | <b>47</b> | <b>1515</b> | <b>985</b>  |                    | <b>£5.75m</b>      | <b>975</b>  | <b>634</b>  |                    | <b>£2.94m</b> | <b>95</b>   | <b>62</b>   |                    | <b>£0.20m</b> |
|                              |           |             |             |                    |                    |             |             |                    |               |             |             |                    | <b>£8.89m</b> |

| Recent Changes |      |      |                              |                |       |                             | Vitality and Viability Summary   |  | Retail Strategy Summary      |  |
|----------------|------|------|------------------------------|----------------|-------|-----------------------------|--|--|------------------------------|--|
| Year           | Conv | Comp | No. of Units<br>Ret Services | Vacant         | Total | Retail Goods<br>Turnover £m | <p>The 2012 survey identified 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.</p> <p><b>Strengths:</b> Public transport accessibility some additional services and facilities; compact centre. Reduction in vacancies since 2012.</p> <p><b>Weaknesses:</b> Limited food retail offer (no major main food shop); limited multiples; adverse impacts of traffic on amenity; mixed environmental quality.</p> <p>Vacancies have reduced and are now below the national average (9% by number of units and 5% by floorspace in 2018).</p> <p><b>Summary:</b> in general it is considered that Torry has below average indicators of vitality and viability but has shown</p> |  | Centre Classification        |  |
| 2004           | 13   | 17   | 18                           | 7              | 55    | £9.96m                      |  |  | Town Centre                  |  |
| 2013           | 4    | 0    | 25                           | 4              | 33    | £5.92m                      |  |  | Protection and manage change |  |
| 2018           | 8    | 10   | 25                           | 4              | 47    | £8.89m                      |  |  | Proposed Retail Floorspace   |  |
|                |      |      |                              | change 2013-18 |       | +50%                        | <b>Commitments</b>   |  |                              |  |
|                |      |      |                              | change 2004-18 |       | -11%                        | <b>Proposals</b>   |  |                              |  |

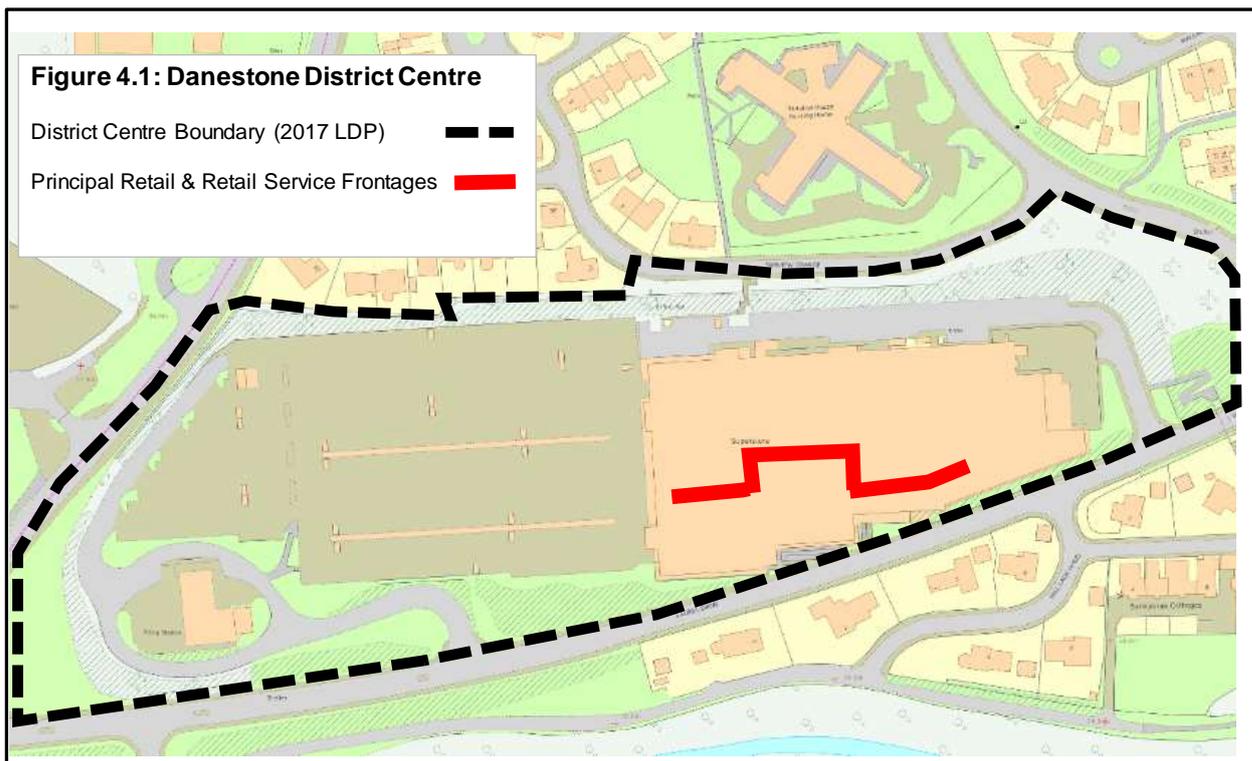
## 4 Aberdeen – District Centres

### Danestone

#### Description and Health Check

- 4.1 Danestone comprises the Tesco superstore with a small number of separate retail and retail service units included within the entrance area to the superstore and to the rear of the superstore tills.

Figure 4.1: Danestone District Centre



#### Catchment Area

- 4.2 The extent of Danestone’s catchment has changed slightly from that identified in the 2013 Study:
- 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 23, 28 and 14 – i.e. the trade draw from Aberdeenshire is limited only to those parts closest to north Aberdeen. Within the PCA market share was identified to be reasonably high – in the region of 30-40% and lower in the secondary catchment area. Compared to 2013 market share in both north Aberdeen and Aberdeenshire has declined reflecting increasing competition from new supermarkets in Stonywood and Denmore.
  - The catchment area for general comparison goods and bulky goods is more restricted being more restricted to Zones 25, 26 and 24S (i.e. north and north west Aberdeen). Market share within this area was relatively modest (the highest was 20% in Zone 25 for general comparison goods and 10% for bulky goods in the same Zone).

*Range Retail Offer and Operators*

- 4.3 Table 3.3 sets out the results of the various surveys of retail and retail services units undertaken for Danestone since 2004.

**Table 4.1: Danestone – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2004 | 1            | 1    | 3            | 0      | 5     | £75.40m      |
| 2012 | 2            | 1    | 5            | 0      | 8     | £76.93m      |
| 2018 | 2            | 3    | 4            | 0      | 9     | £68.83m      |

- 4.4 The Table shows that there has been an increase in total units within Danestone although, since there has not been increase in total floor area, this would result from either the subdivision of existing small units or loss of space from Tesco to form a new unit. The table shows that there has been increase in comparison goods shops and a reduction in retail services. There remain no vacancies within the centre. Retail goods turnover of the centre is slightly lower than identified in 2012 reflecting increased supermarket competition in north Aberdeen. It should be noted that the mezzanine level of Tesco has been subdivided to form a series of units for Arcadia brands (Dorothy Perkins etc).
- 4.5 Three operators are national multiples.

*Additional Services and Facilities*

- 4.6 Danestone does not provide any significant additional non-retail services or facilities.

*Occupier Demand and Activity*

- 4.7 Since 2013 there have been no applications for development/redevelopment in Danestone.

*Rents and Yields*

- 4.8 No information is available.

*Shopper/Household Survey Information*

- 4.9 The 2013 Report identified that there were above average levels of satisfaction for food shopping but slightly below average satisfaction for non-food shopping. There were high levels of satisfaction for ease of access to the centre. Overall there was average satisfaction with Danestone as a place to shop.

*Vacancy Rates*

- 4.10 There are no vacant units in Danestone and none have been recorded since 2004.

---

*Accessibility*

- 4.11 Three bus routes (First services 1, 8A and 18) pass along Laurel Drive adjacent to the Tesco superstore Road linking Danestone to most of north Aberdeen as well as to the City Centre. There is extensive off-street parking available at the centre.

*Environment*

- 4.12 The environment is dominated by car parking and vehicular access – there is also poor integration between the centre and surrounding residential areas. The building quality is typical of a retail superstore.

*Summary*

- 4.13 In overall terms the centre provides a limited retail offer and very limited additional services and facilities. The centre is dominated by a single superstore although there has been a modest increase in additional units within the superstore providing some choice for shoppers. The centre continues to provide an important local role although there has been some increase in alternative retail provision in north Aberdeen since 2012.

**Prospects and Key Issues**

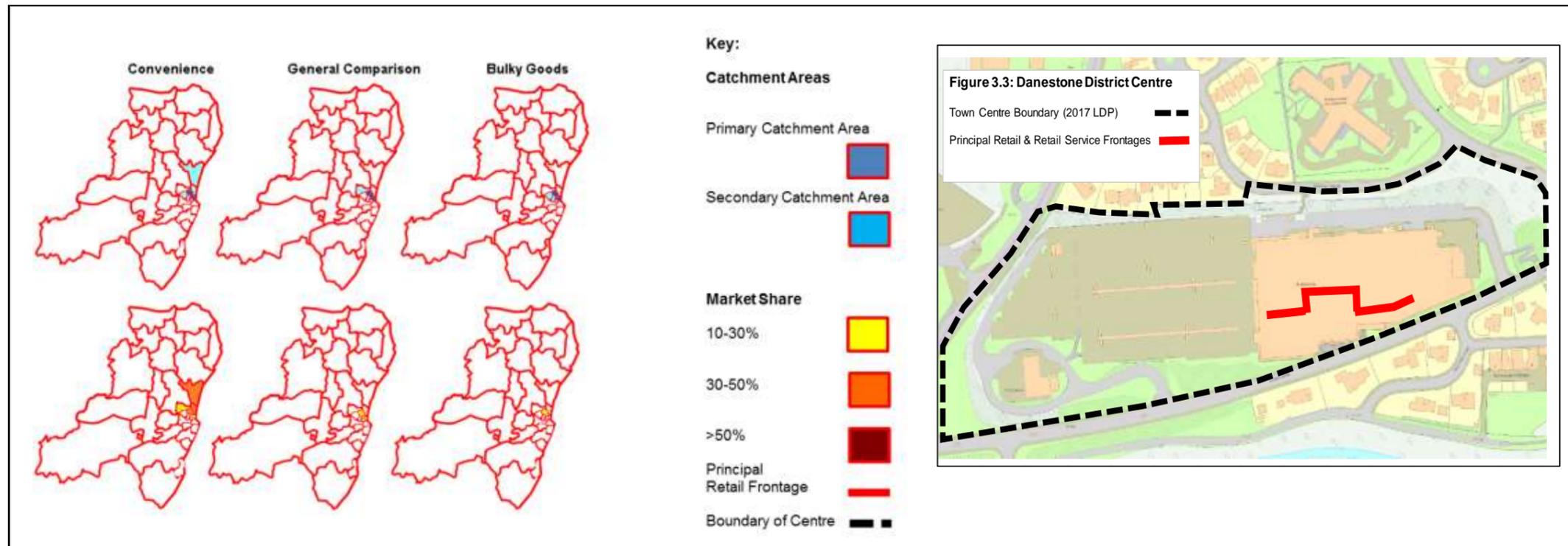
- 4.14 Although Danestone is located close to major new expansion areas including Grandholme, Stoneywood and Newhills/Bucksburn areas it will be adversely affected by new retail facilities developed to serve these new communities. The effect of this has already been seen with the M&S Foodhall and Co-op stores in Stoneywood as well as the expanded Lidl at Bucksburn. Superstores also appear to have been affected by a shift in shopping patterns for groceries away from major weekly shops to more frequent trips to smaller stores. Assuming this trend continues it is expected that the turnover of Danestone will continue to decline slowly to 2027. The significance of these impacts is difficult to assess because this will depend upon the precise proposals for Grandholme, Newhills and Denmore Road.
- 4.15 The principal issues for Danestone remain those identified in the 2013 Report:
- 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 – although the use of the mezzanine for non-Tesco operators is supporting some diversification here.

**Review of Retail Strategy**

- 4.16 Based on the above review it is recommended that the retail strategy for Danestone continues that identified in the 2013 Report:

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

4.17 Danestone is identified as a District Centre in the proposed retail strategy. Danestone does not conform to a conventional notion of a District Centre in that it is dominated by a single shop and has only a limited range of non-retail facilities and services. However, as noted above, there has been some diversification in recent years within Tesco and Danestone continues to 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.



**Floorspace and Turnover 2018**

|                    | 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 | 5        | 6771        | 4401        |                 | 43.48          | 5503               | 3577        |                 | 22.32          | 1331        | 865        |                 | 3.03          | 13605        | 8844        |                 | 68.83          |
| Retail Services    | 4        |             |             |                 |                |                    |             |                 |                |             |            |                 |               | 311          |             |                 |                |
| Vacant             | 0        |             |             |                 |                |                    |             |                 |                |             |            |                 |               | 0            |             |                 |                |
| <b>Total</b>       | <b>9</b> | <b>6771</b> | <b>4401</b> |                 | <b>£43.48m</b> | <b>5503</b>        | <b>3577</b> |                 | <b>£22.32m</b> | <b>1331</b> | <b>865</b> |                 | <b>£3.03m</b> | <b>13917</b> | <b>8844</b> |                 | <b>£68.83m</b> |

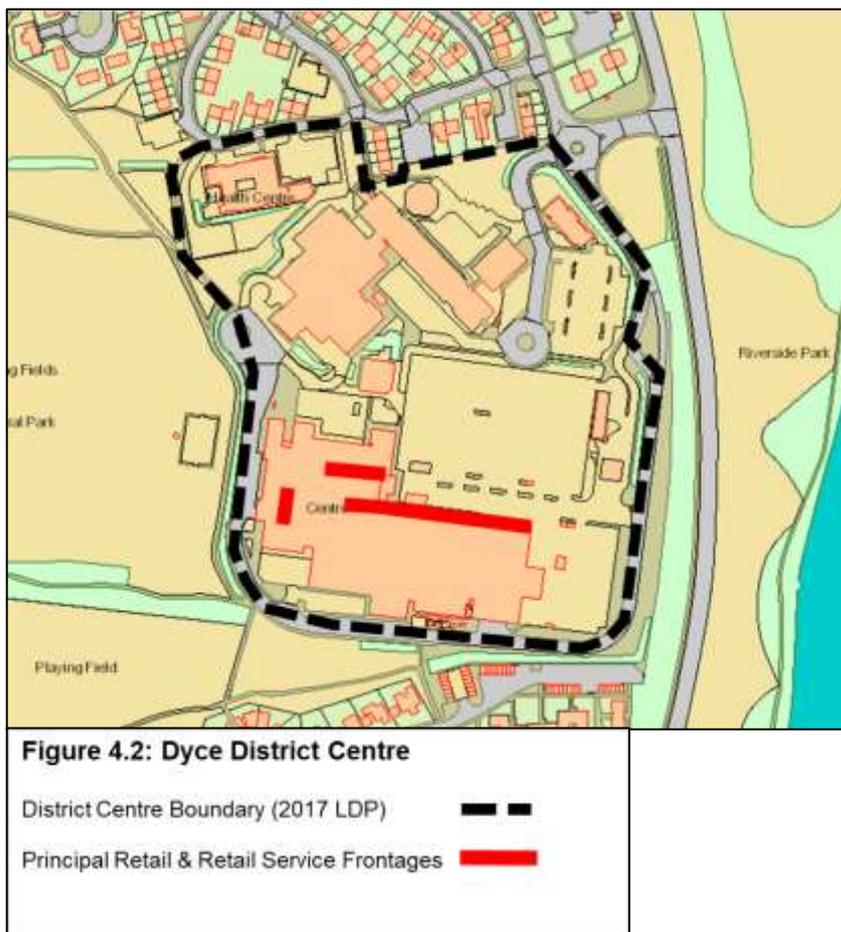
| Year | Recent Changes |      |              |                |       | Retail Goods Turnover £m | <p><b>Vitality and Viability Summary</b></p> <p>The nature of Danestone as a district centre, dominated by a major superstore with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:</p> <p>The 2012 household survey identified 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</p> <p><b>Strengths:</b> No vacancies; ease of access by private car. No vacancies identified in 2018.</p> <p><b>Weaknesses:</b> Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking.</p> <p><b>Summary:</b> 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. Slight reduction in turnover reflecting national changes and increased provision in north Aberdeen.</p> | Retail Strategy Summary |                 |
|------|----------------|------|--------------|----------------|-------|--------------------------|--|-------------------------|-----------------|
|      | Conv           | Comp | Ret Services | Vacant         | Total |                          |  | Centre Classification   | District Centre |
| 2004 | 1              | 1    | 3            | 0              | 5     | £75.40m                  | <p><b>Planning Policy Approach</b></p> <p>Protection</p>   |                         |                 |
| 2013 | 2              | 1    | 5            | 0              | 8     | £76.93m                  |  |                         |                 |
| 2018 | 2              | 3    | 4            | 0              | 9     | £68.83m                  |  |                         |                 |
|      |                |      |              | change 2013-18 |       | -11%                     | <p><b>Proposed Retail Floorspace</b></p> <p>Potentially affected by new District Centre proposals for north and west of Aberdeen.</p>  |                         |                 |
|      |                |      |              | change 2004-18 |       | -9%                      | <p><b>Commitments</b></p>  |                         |                 |
|      |                |      |              |                |       |                          | <p><b>Proposals</b></p>  |                         |                 |

## Dyce

### Description and Health Check

4.18 Dyce comprises the Asda superstore with a small number of separate retail service units and a nursery included within the shopping centre adjacent to the store. To the north of the store within the defined District Centre is Dyce Academy, a health centre, dentist and library.

**Figure 4.2: Dyce District Centre**



### Catchment Area

- 4.19 The analysis of trade draw to Dyce indicates slight changes to the catchment areas identified in the 2013:
- The primary catchment area now comprises Zone 15 which is outwith the City. This primarily reflects increased competition close to Dyce to the south east from new stores in Stoneywood and the improved retail offer in Bucksburn. For many living in Zone 15 Dyce remains the most convenient location for major food shopping purposes whereas those living in the north west of the city there is greater choice and Dyce has become, gradually, less attractive. The secondary catchment area was identified to be Zones 24N and 28.
  - For comparison goods the catchment areas are more widespread comprising a number of zones in both the City and Aberdeenshire. This reflects the generally broad non-food offer within the Asda superstore.

- Market share of the store within the primary catchment area was high for convenience goods – approximately 30-50% in Zones 24N and 15 but these rates are lower than were identified in 2013. This reduction in market share continues a trend identified for the period 2004-2013.
- Market share for comparison goods was much lower – in the region of 10% in the prime catchment area for general comparison and higher for bulky goods.

4.20 As well as the new convenience floorspace in Stoneyburn and Bucksburn, Dyce has also been affected by the improved retail offer at Bridge of Don.

4.21 The role of Dyce as a District Centre therefore appears more ambiguous than in previous years. It continues to provide an important local function within Dyce itself and for rural areas to the north and west but is less significant for other nearby areas of Aberdeen. Its role for providing comparison goods remains important as it serves a relative wide area for this function. Taking these factors together Dyce remains an important District Centre for the north west of the City.

#### *Range Retail Offer and Operators*

4.22 Table 4.2 sets out the results of the various surveys of retail and retail services units undertaken for Dyce since 2004.

**Table 4.2 Dyce – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2004 | 2            | 9    | 1            | 2      | 14    | £44.69m      |
| 2012 | 1            | 3    | 5            | 2      | 11    | £48.97m      |
| 2018 | 1            | 3    | 1            | 7      | 12    | £43.36m      |

4.23 The Table shows that the key change since 2012 has been an increase in vacant units within the centre and loss of retail services (part of which has been through conversion into a day nursery). Retail goods turnover of the centre has declined significantly from that identified in 2012 and is now lower than that identified in 2004. Three operators are national multiples.

#### *Additional Services and Facilities*

4.24 Dyce provides a limited range of additional facilities and services including:

- Library
- Dentist
- Nursery
- Health Centre
- High School/Academy

- 4.25 Notwithstanding the loss of retail services since 2012 the above additional facilities are important for the local community and it is considered that Dyce still performs important district centre functions.

#### *Occupier Demand and Activity*

- 4.26 Since 2012 the key change has been the conversion of four units from retail (in fact they were in retail service use) to a day nursery which was approved in 2015 and subsequently implemented).

#### *Rents and Yields*

- 4.27 JLL is marketing the vacant retail units within the centre (it should be noted that, for marketing purposes, three of the small units have been combined to form a medium sized unit). Average rents are approximately £200 psm for small units and £165 psm for the larger unit.

#### *Shopper/Household Survey Information*

- 4.28 The 2013 Report identified that there were above average levels of satisfaction for food shopping but below average satisfaction for non-food shopping. There were good to very good levels of satisfaction for ease of access to the centre and car parking. Overall there was average satisfaction with Dyce as a place to shop.

#### *Vacancy Rates*

- 4.29 In November 2018 7 units were identified as vacant (although these are being marketed as, in effect, 5 vacant units). This equates to a maximum of 58% vacancy by number of units although the vacancy rate by floor area is only 8% due to the size and dominance of the Asda superstore. Although this is a below average vacancy rate in terms of floor area these vacant units are prominent and have a significant adverse impact on the appearance of the centre.

#### *Accessibility*

- 4.30 A number of bus routes serve Dyce centre (First services 17, 17A, 18, 18A and Stagecoach 235) linking the centre to the remainder of Dyce, Bucksburn, Newhills, Danestone and the City Centre. The Stagecoach service links the centre to rural areas to the north including Newmachar and Oldmeldrum. There is extensive off-street parking. Pedestrian access from local residential areas is not straightforward.

#### *Environment*

- 4.31 The environment is dominated by car parking and vehicular access – there are reasonable pedestrian links but the shopping centre is some distance from the nearest residential areas. The building quality is typical of its age but does not present a particularly attractive external appearance. The covered shopping mall provides protection for shoppers in inclement weather.

#### *Summary*

- 4.32 In overall terms the centre provides a limited retail offer but provides some important social and community services and facilities. The centre is dominated by a single superstore although attempts to provide additional

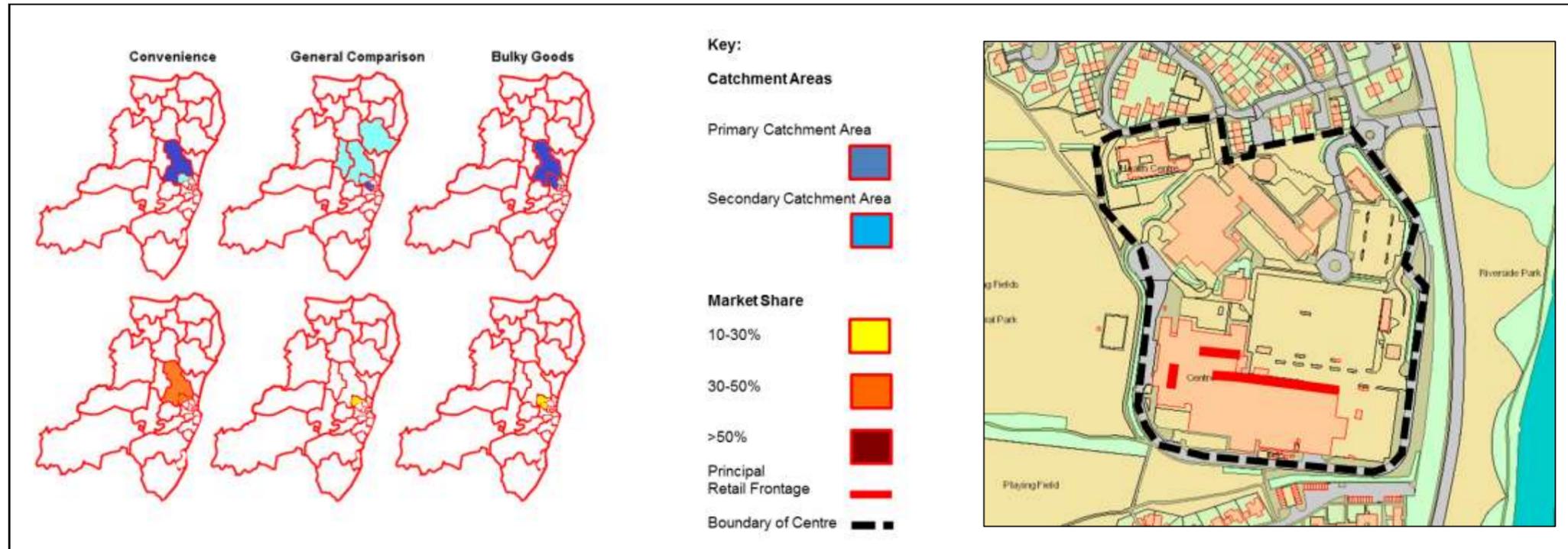
retail services and shops on a sustained basis have been unsuccessful. The centre continues to provide an important local role although there has been some increase in alternative retail provision in north Aberdeen since 2012.

### Prospects and Key Issues

- 4.33 Although Dyce is located close to the Newhills, Stoneywood 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 expansion areas. This has already been seen with the impact of the new stores in Stoneywood. Superstores also appear to have been affected by a shift in shopping patterns for groceries away from major weekly shops to more frequent trips to smaller stores. Assuming this trend continues it is expected that the turnover of Dyce is expected to continue to decline slowly to 2027. It is also evident that the centre is in need of new investment to refresh the appearance and environment of the centre. The significance of these impacts is difficult to assess because this will depend upon the precise proposals for Grandholme and Newhills.
- 4.34 The principal issues for Dyce remain those identified in the 2013 Report i.e.:
- Significant market growth but also major new floorspace proposals in north and west Aberdeen increasing competition. Increased competition from modern, smaller stores in Stoneywood and Bucksburn.
  - Need for improvement/investment in the centre to refresh/improve the shopping environment.
  - Highly visible vacancies affecting the appearance and environment of the centre.
  - The limited retail offer and range of non-retail services 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.

### Review of Retail Strategy

- 4.35 Based on the above review it is recommended that the retail strategy for Dyce continues that identified in the 2013 Report:
- Identification of Dyce as a **District Centre** in the retail network.
  - Policies to protect Dyce District Centre from adverse impact from retail proposals.
- 4.36 Dyce does not conform to a conventional notion of a District Centre in that it is dominated by a single shop and has only a limited range of non-retail facilities and services. However, despite the difficulties identified above Dyce continues to have an important local role and this is seen in relatively high levels of market share within its primary catchment area and this, together with limited alternative provision within this part of Aberdeen, have been important factors in recommending the continued identification of the Dyce as a District Centre.



**Floorspace and Turnover 2018**

|                    | No.       | Convenience |             |                 | General Comparison |             |                 | Bulky Goods |            |                 | All Goods    |             |                 |
|--------------------|-----------|-------------|-------------|-----------------|--------------------|-------------|-----------------|-------------|------------|-----------------|--------------|-------------|-----------------|
|                    |           | GFA Sq M    | NFA Sq M    | Turnover £/Sq M | GFA Sq M           | NFA Sq M    | Turnover £/Sq M | GFA Sq M    | NFA Sq M   | Turnover £/Sq M | GFA Sq M     | NFA Sq M    | Turnover £/Sq M |
| Retail Goods Shops | 4         | 4791        | 2635        | 25.92           | 3571               | 2016        | 15.06           | 871         | 479        | 2.38            | 9233         | 5130        | 43.36           |
| Retail Services    | 1         |             |             |                 |                    |             |                 |             |            |                 | 92           | 8%          |                 |
| Vacant             | 7         |             |             |                 |                    |             |                 |             |            |                 | 769          |             |                 |
| <b>Total</b>       | <b>12</b> | <b>4791</b> | <b>2635</b> | <b>£25.92m</b>  | <b>3571</b>        | <b>2016</b> | <b>£15.06m</b>  | <b>871</b>  | <b>479</b> | <b>£2.38m</b>   | <b>10093</b> | <b>5130</b> | <b>£43.36m</b>  |

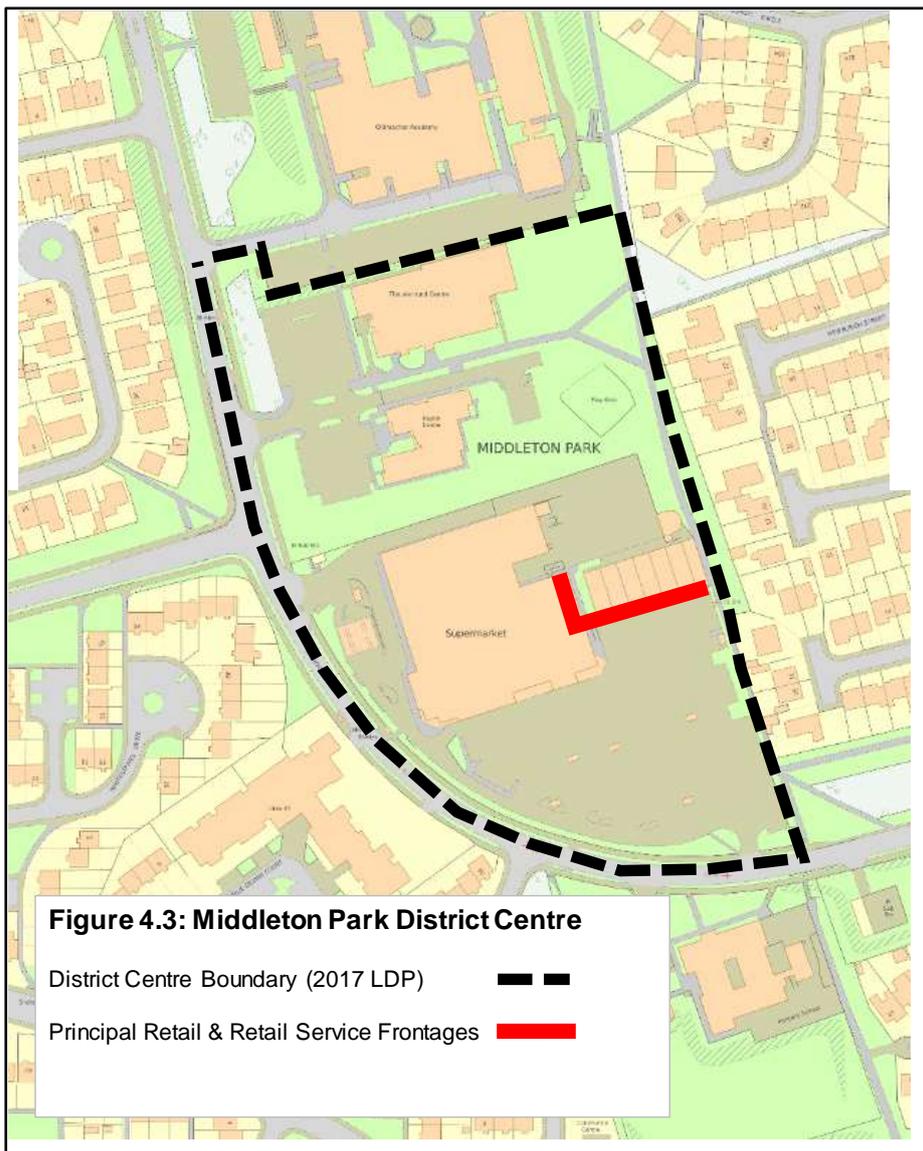
| Recent Changes |      |      |                           |        |       |             | Retail Goods   |                 | Vitality and Viability Summary |   | Retail Strategy Summary  |  |
|----------------|------|------|---------------------------|--------|-------|-------------|--|-----------------|--------------------------------|---|--------------------------|--|
| Year           | Conv | Comp | No. of Units Ret Services | Vacant | Total | Turnover £m |  |                 | Centre Classification          |   | Planning Policy Approach |  |
| 2004           | 2    | 9    | 1                         | 2      | 14    | £44.69m     | 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.<br>The 2012 survey identified 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<br><b>Strengths:</b> Ease of access by private car. Centre includes some important community facilities.<br><b>Weaknesses:</b> Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking; high level of vacancies, particularly since 2012.<br><b>Summary:</b> limited applicability of indicators to this centre. Indicators of viability appear average - major superstore remains strong but increase in vacancies in small units. Turnover has reduced reflecting national changes and competition from stores in north Aberdeen. Few occupied units and limited range of additional facilities, services and | District Centre | Protection                     | <b>Proposed Retail Floorspace</b><br><b>Commitments</b><br><b>Proposals</b> Potentially affected by new District Centre proposals for north and west of Aberdeen. |                          |  |
| 2013           | 1    | 3    | 5                         | 2      | 11    | £48.97m     |  |                 |                                |   |                          |  |
| 2018           | 1    | 3    | 1                         | 7      | 12    | £43.36m     |  |                 |                                |   |                          |  |
|                |      |      |                           |        |       |             | change 2013-18   | -11%            |                                |   |                          |  |
|                |      |      |                           |        |       |             | change 2004-18   | -3%             |                                |   |                          |  |

## Middleton Park

### Description and Health Check

4.37 Middleton Park comprises the Asda superstore with a small number of separate retail and retail service units provided adjacent to the store. To the north of the store within the defined District Centre is a health centre, dentist and sports/health centre.

**Figure 4.3: Middleton Park District Centre**



### Catchment Area

4.38 The catchment areas for Middleton Park are as follows:

- For all sectors the primary catchment area was 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, 26 and 28 has been identified. Previously the SCA included Zone 14 in Aberdeenshire but this is no longer the

case – reflecting the impact that the food retail floorspace at Bridge of Don RP has on reducing expenditure flows to Middleton Park. SCAs for comparison goods are limited to Zone 26.

- Within the primary catchment area (Zone 25) market share for convenience goods remains significant – identified to be approximately 30% (which is lower than identified in 2013) and 25% in Zone 23. Although this was lower than a number of other superstores it was 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 was expected to be significantly higher. Market shares for comparison goods are low, even in the PCA.

4.39 The high level of market share within the Middleton Park area, particularly for convenience goods, confirmed the role of location serving a District Centre function for this part of north Aberdeen. This was reinforced by the presence of important local community facilities located adjacent to the retail units. These factors support the continued identification of Middleton Park as a District Centre.

4.40 Since 2013 there has been limited additional food retail in areas close to Middleton Park (notably the M&S Foodhall in Denmore) and market penetration rates have, therefore declined. In addition, the new comparison retail floorspace developed in Denmore would affect the, already low, market penetration rates within the catchment area for these goods. Nonetheless it is not considered that this new floorspace would have affected the overall function of this locality as a District Centre.

#### *Range Retail Offer and Operators*

4.41 Table 4.3 sets out the results of the various surveys of retail and retail services units undertaken for Middleton Park since 2004.

**Table 4.3: Middleton Park – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2004 | 1            | 1    | 5            | 0      | 7     | £25.96m      |
| 2012 | 1            | 0    | 6            | 0      | 7     | £28.36m      |
| 2018 | 1            | 1    | 5            | 0      | 7     | £25.88m      |

4.42 The Table shows that the only change since 2012 has been one retail service unit changing to comparison goods retail (a charity shop). Retail goods turnover is slightly lower than identified in 2012 but is very similar to that identified in 2004.

4.43 There are only two retail goods shops one of which is Asda (i.e. a national multiple).

#### *Additional Services and Facilities*

4.44 Middleton Park provides a limited range of additional facilities and services including:

- Dentist
- Health Centre

- Leisure/Sport Centre and Gym

4.45 In overall terms the combination of retail, retail services and other services/facilities are important for the local community and it is considered that Middleton Park continues to perform important district centre functions.

#### *Occupier Demand and Activity*

4.46 Since 2013 the only change has been the conversion of one retail service unit (hot food carry-out) to a charity shop. Lack of vacant units since 2004 would indicate that there is sustained demand for units at Middleton Park.

#### *Rents and Yields – information not available*

#### *Shopper/Household Survey Information*

4.47 The 2013 Report identified that there were above average levels of satisfaction for food shopping but below average satisfaction for non-food shopping. There were high levels of satisfaction for ease of access to the centre (for both private and public transport). Overall there was average satisfaction with Middleton Park as a place to shop.

#### *Vacancy Rates*

4.48 In November 2018 no units were identified as vacant.

#### *Accessibility*

4.49 First bus services 2, 8 and 8A serve Middleton Park centre linking it to the remainder of Middleton Park, Shielhill, Danestone and the City Centre.

#### *Environment*

4.50 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.

#### *Summary*

4.51 In overall terms the centre provides a limited retail offer and provides some important social and community services and facilities. The centre is dominated by a single superstore with a limited range of additional retail services. The centre continues to provide an important local role although there has been some increase in alternative retail provision in north Aberdeen since 2013.

### **Prospects and Key Issues**

4.52 Issues affecting Middleton Park centre are similar to those identified for both Danestone and Dyce. Although 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. It has also been affected by additional convenience and comparison floorspace developed at Bridge of Don RP.

Therefore, despite growth in available expenditure in the wider area the turnover of Middleton Park is expected to decline through to 2027 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.

4.53 The principal issues for Middleton Park therefore are similar to those identified in the 2013 report:

- Significant market growth but also major new floorspace proposals in north Aberdeen increasing competition.
- The limited retail offer within Middleton Park.

4.54 Some additional services and facilities are provided within the centre including both retail services and other community services.

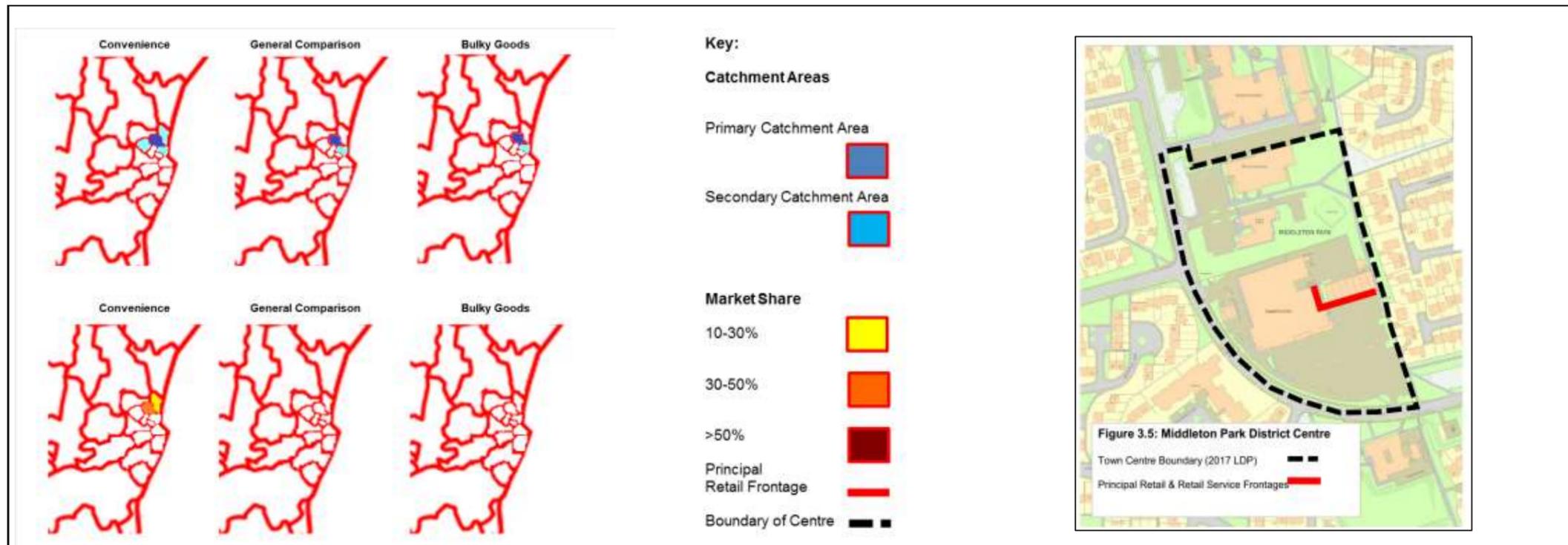
#### **Review of Retail Strategy**

4.55 Based on the above review it is recommended that the retail strategy for Middleton Park continues that identified in the 2013 Report:

- 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.

4.56 As with Danestone and Dyce, which are also centres dominated by a single superstore, 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 Middleton Park does also provide a range of community health and related facilities. However, Middleton Park continues to have an important local role and this is seen in relative 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 in the continued identification of the Middleton Park as a District Centre.

4.57 The recommended Retail Strategy therefore continues to identify Middleton Park as a District Centre within the retail network.



**Floorspace and Turnover 2013**

| Floorspace and Turnover 2018 |          | Convenience |             |                    |                | General Comparison |             |                    |               | Bulky Goods |             |                    |               | All Goods   |             |                    |                |
|------------------------------|----------|-------------|-------------|--------------------|----------------|--------------------|-------------|--------------------|---------------|-------------|-------------|--------------------|---------------|-------------|-------------|--------------------|----------------|
|                              | No.      | GFA<br>Sq M | NFA<br>Sq M | Turnover<br>£/Sq M | £m             | GFA<br>Sq M        | NFA<br>Sq M | Turnover<br>£/Sq M | £m            | GFA<br>Sq M | NFA<br>Sq M | Turnover<br>£/Sq M | £m            | GFA<br>Sq M | NFA<br>Sq M | Turnover<br>£/Sq M | £m             |
| Retail Goods Shops           | 2        | 3617        | 1989        |                    | 19.70          | 1407               | 785         |                    | 5.56          | 258         | 142         |                    | 0.62          | 5282        | 2916        |                    | 25.88          |
| Retail Services              | 5        |             |             |                    |                |                    |             |                    |               |             |             |                    |               | 533         |             |                    |                |
| Vacant                       | 0        |             |             |                    |                |                    |             |                    |               |             |             |                    |               | 0           |             |                    |                |
| <b>Total</b>                 | <b>7</b> | <b>3617</b> | <b>1989</b> |                    | <b>£19.70m</b> | <b>1407</b>        | <b>785</b>  |                    | <b>£5.56m</b> | <b>258</b>  | <b>142</b>  |                    | <b>£0.62m</b> | <b>5814</b> | <b>2916</b> |                    | <b>£25.88m</b> |

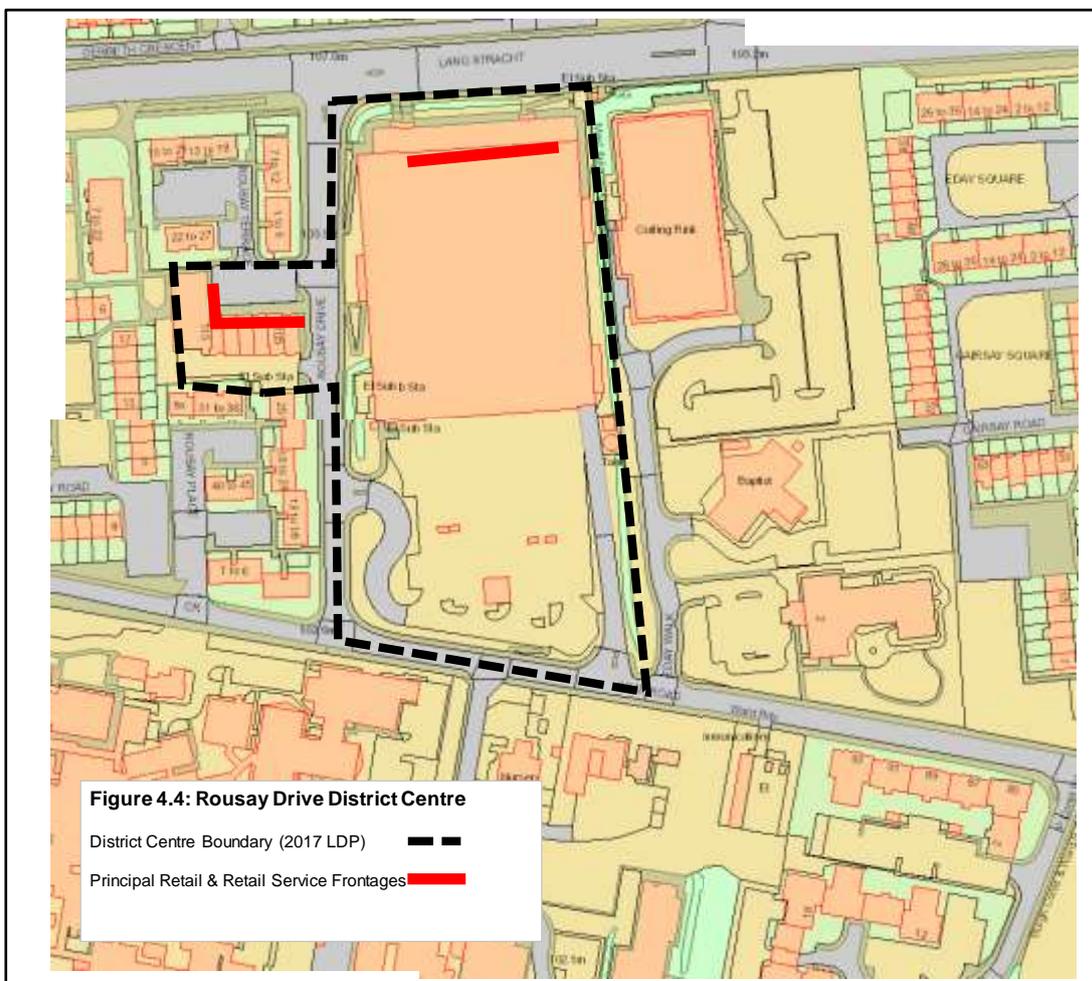
| Recent Changes |      |      |                              |        |       |         | Retail Goods Turnover £m  | Vitality and Viability Summary | Retail Strategy Summary   |  |
|----------------|------|------|------------------------------|--------|-------|---------|---|--------------------------------|---|--|
| Year           | Conv | Comp | No. of Units<br>Ret Services | Vacant | Total |         |   | Centre Classification          |   |  |
| 2004           | 1    | 1    | 5                            | 0      | 7     | £25.96m | <p>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</p> <p>The 2012 survey identified 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.</p> <p><b>Strengths:</b> No vacant units; ease of access by private car; provides some important local facilities and services. Slight decline in turnover reflecting increased competition in north Aberdeen.</p> <p><b>Weaknesses:</b> Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking.</p> <p><b>Summary:</b> 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> | Centre Classification          | District Centre   |  |
| 2013           | 4    | 0    | 5                            | 0      | 9     | £28.36m |   | Planning Policy Approach       | Protection  |  |
| 2018           | 1    | 1    | 5                            | 0      | 7     | £25.88m |   | Proposed Retail Floorspace     |   |  |
|                |      |      |                              |        |       |         |   | Commitments                    |   |  |
|                |      |      |                              |        |       |         |   | Proposals                      | Potentially affected by new District Centre proposals for north and west of Aberdeen. |  |

## Rousay Drive

### Description and Health Check

4.58 Rousay Drive comprises the Tesco superstore with a small number of separate retail service units provided adjacent to the store on Rousay Drive.

Figure 4.4: Rousay Drive District Centre



### Catchment Area

4.59 The catchment areas for Rousay Drive are identified as follows:

- The catchment area for Rousay Drive is primarily determined by shopping patterns to the Tesco superstore. The unit shops at Rousay Drive appeared 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 comprised Zones 28 and 29N (i.e. the areas to the north and south of the superstore) and the secondary catchment was considered to include 29S and parts of 30. The catchment areas for general and bulky comparison goods reflected those for convenience goods.
- Within the primary catchment area (Zones 28 and 29N) market share for convenience goods was significant – identified to be approximately 15-25%. Although lower than a number of other superstores

it was noted that this area has easy access to a range of superstores including those at Danestone, Berryden and Garthdee, Trade draw was 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.

4.60 The Tesco at Rousay Drive is an important location for the regular purchase of convenience goods for this part of west Aberdeen. The levels of market shares are comparable to the centres at Middleton Park, Danestone and Berryden and it would be consistent to include on a similar basis Rousay Drive as a District Centre. This was identified in the 2013 report and included as a District Centre in the 2017 Local Plan.

4.61 Since 2013 there has been very limited additional retail development in the catchment areas of Rousay Drive and, as a result, market penetration rates have remained broadly similar to those identified in 2013.

#### *Range Retail Offer and Operators*

4.62 Table 4.4 sets out the results of the various surveys of retail and retail services units undertaken for Rousay Drive since 2012.

**Table 4.4: Rousay Drive – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2012 | 4            | 0    | 4            | 0      | 8     | £41.51m      |
| 2018 | 2            | 0    | 5            | 1      | 8     | £39.68m      |

4.63 The Table shows that there has been the loss of two small convenience goods shops (a baker and CTN) and increase in one retail service unit and one vacant unit. Turnover identified in the table is for Tesco alone and it identifies a slight reduction in turnover (-4%) since 2013. This reduction reflects some increases in competition to the north of the catchment area (Bucksburn/Stoneywood) and a slight reduction in overall spend in major superstores compared to other retail formats.

4.64 There are only two retail goods shops one of which is Tesco (i.e. a national multiple).

4.65 Immediately to the east of the Tesco store is a curling rink, Baptist Church and rehabilitation centre. Whereas the Church is a significant local facility the curling rink and rehabilitation centre provide services/facilities on a city-wide basis and it is considered that the current boundary in the LDP is reasonable for defining the District Centre.

#### *Additional Services and Facilities*

4.66 Rousay Drive does not provide any additional facilities and services for the community (although the Baptist Church immediately to the east of Tesco has been noted).

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*Occupier Demand and Activity*

- 4.67 Since 2013 there have been limited changes to units in Rousay Drive. Consent was granted in 2015 for change of use from Class 1 to a hot food takeaway at 103 Rousay Drive and consents were also granted in 2015 for a car wash and car rental facility within the Tesco car park.

*Rents and Yields – information not available**Shopper/Household Survey Information – not available**Vacancy Rates*

- 4.68 One vacant unit represents a vacancy rate of 12.5% by number of units but only 1% by floor area.

*Accessibility*

- 4.69 One First bus service (no. 23) passes along Lang Stracht linking the centre to Sheddocksley and the City Centre.

*Environment*

- 4.70 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.

*Summary*

- 4.71 In overall terms the centre provides a limited retail offer dominated by a single superstore with a limited range of additional retail services. However, the centre continues to provide an important local role particularly for convenience goods shopping as seen through relative high penetration (market share) rates.

**Prospects and Key Issues**

- 4.72 Rousay Drive is located close to the Maidencraig, Greenfearns 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. To serve this development a new centre at Rowett (site OP21) is identified in the 2017 Local Plan including a new 4000 sq m GFA supermarket. This scale of development (equivalent to ca. 2500 sq m NFA convenience) is broadly consistent with the scale of new housing proposed and should not significantly affect Rousay Drive, however, the impact will depend upon the scale and timing of the new housing and proposed retail floorspace within the new centre.
- 4.73 The key issues for Rousay Drive therefore remain similar to those identified in the 2013 report:
- Significant market growth but also major new floorspace proposals in west Aberdeen increasing competition.

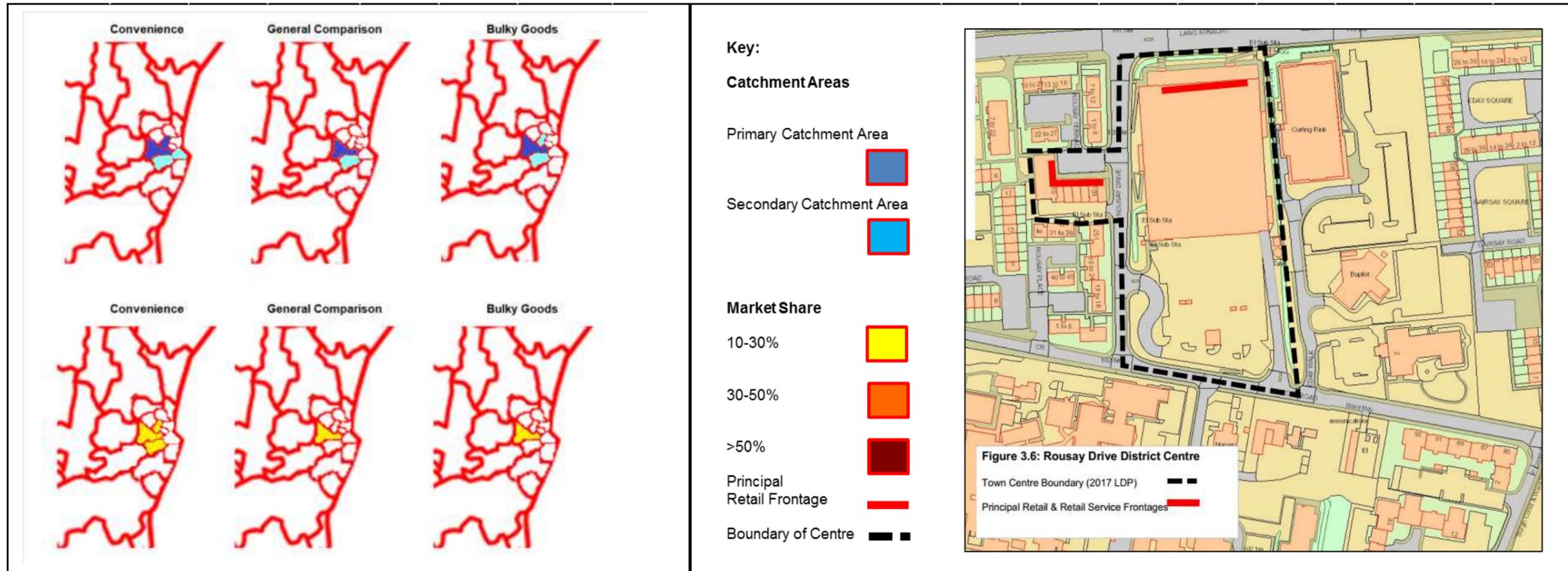
- 
- The limited retail offer within Rousay Drive.
  - Some additional services and facilities are provided within the centre including retail services but no significant other community services are present.

### Review of Retail Strategy

4.74 The review of the Retail Strategy proposes:

- Continued 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.

4.75 Rousay Drive shares many characteristics of other superstore-based District Centres located in the west and north of Aberdeen and, as such, 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. However, Rousay Drive does have an important local role in the local area as 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, are important factors supporting the identification of the Rousay Drive as a District Centre.



| Floorspace and Turnover 2013 |          |             |             |                 |                    |             |                 |             |            |                 |             |             |                 |
|------------------------------|----------|-------------|-------------|-----------------|--------------------|-------------|-----------------|-------------|------------|-----------------|-------------|-------------|-----------------|
| Floorspace and Turnover 2018 |          |             |             |                 |                    |             |                 |             |            |                 |             |             |                 |
|                              | No.      | Convenience |             |                 | General Comparison |             |                 | Bulky Goods |            |                 | All Goods   |             |                 |
|                              |          | GFA Sq M    | NFA Sq M    | Turnover £/Sq M | GFA Sq M           | NFA Sq M    | Turnover £/Sq M | GFA Sq M    | NFA Sq M   | Turnover £/Sq M | GFA Sq M    | NFA Sq M    | Turnover £/Sq M |
| Retail Goods Shops           | 2        | 4052        | 2634        | 31.04           | 2107               | 1370        | 7.55            | 301         | 196        | 1.09            | 6460        | 4199        | 39.68           |
| Retail Services              | 5        |             |             |                 |                    |             |                 |             |            |                 | 365         |             |                 |
| Vacant                       | 1        |             |             |                 |                    |             |                 |             |            |                 | 75          |             |                 |
| <b>Total</b>                 | <b>8</b> | <b>4052</b> | <b>2634</b> | <b>£31.04m</b>  | <b>2107</b>        | <b>1370</b> | <b>£7.55m</b>   | <b>301</b>  | <b>196</b> | <b>£1.09m</b>   | <b>6900</b> | <b>4199</b> | <b>£39.68m</b>  |

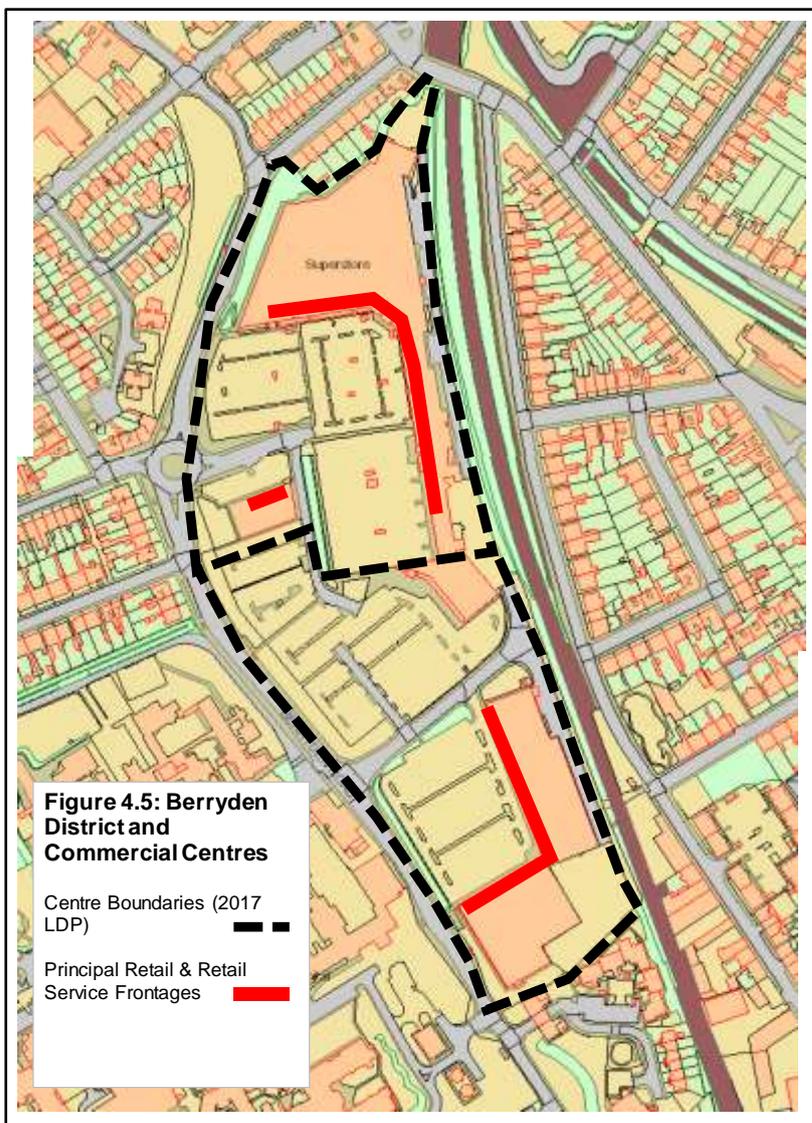
| Recent Changes |      |      |                           |        |                |                          | Vitality and Viability Summary  | Retail Strategy Summary                |                 |
|----------------|------|------|---------------------------|--------|----------------|--------------------------|---|--|-----------------|
| Year           | Conv | Comp | No. of Units Ret Services | Vacant | Total          | Retail Goods Turnover £m | 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<br><b>Strengths:</b> One small vacant unit; ease of access by private car.<br><b>Weaknesses:</b> 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.<br><b>Summary:</b> 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. | Centre Classification                  | District Centre |
| 2013           | 4    | 0    | 5                         | 1      | 10             | £41.51m                  |   | Planning Policy Approach               | Protection      |
| 2018           | 2    | 0    | 5                         | 1      | 8              | £39.68m                  |   | Proposed Retail Floorspace Commitments |                 |
| 2018           |      |      |                           |        | change 2013-18 | -4%                      |   | Proposals                              |                 |

## Berryden (including Lower Berryden Commercial Centre)

### Description and Health Check

- 4.76 Upper Berryden is the northern part of the Berryden shopping area and is identified as a District Centre in the LDP. The southern part (Lower Berryden) is identified as a Commercial Centre comprising a series of large unit retail warehouses and the Mecca Bingo Hall. Part of the District Centre lies immediately above units in Lower Berryden which are accessed from the lower level. Whereas the District Centre part does contain the Sainsbury Superstore and small unit shops it also includes two large retail warehouse units (Harry Corry and Poundland) which results in it sharing some of the characteristics of the Commercial Centre.
- 4.77 Because of the close physical integration of the District Centre part with the Commercial Centre this Report considers Berryden as a single whole for assessing catchment areas and market penetration (market share) assessments.

Figure 4.5: Berryden – District and Commercial Centres



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*Catchment Area*

4.78 The catchment areas for Berryden (as a whole) are as follows:

- For convenience goods, which are found in the Sainsbury superstore (i.e. the District Centre), the primary catchment area and secondary catchment area was 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 were lower than superstores to the north reflecting the large population within this part of the City and the choice that residents have for access to these other superstores. Nonetheless highest market shares were similar to those identified for Rousay Drive (up to 23% market share in Zone 27 and lower elsewhere).
- In contrast the catchment area for general comparison goods (i.e. primarily the Commercial Centre) was more extensive comprising much of the city. However, whereas the 2013 study identified the SCA to include significant parts of Aberdeenshire, the current study does not identify these areas to form a significant secondary catchment. The overall catchment area for these goods remains wide but market share within this area was low – the highest is in Zone 27 at 12% but falls to 6-9% in the SCA and to 2-4% in much of Aberdeenshire.
- The position with bulky goods is different again. Trade for the purchase of these goods is, effectively, city wide and it is more appropriate to consider this as a broad secondary catchment area without any part of the city prominent as a primary market for the centre.

4.79 The above review could be regarded as supporting the 2017 LDP split of Berryden between the District Centre (Upper part) and Commercial Centre (lower part of Berryden). The District Centre (primarily Sainsbury) having a more localised catchment whereas the retail warehouse units serving a city-wide (and also parts of Aberdeenshire). However, this is complicated by the fact that the Sainsbury superstore includes a significant proportion (currently 40%) of its floorspace for the sale of general comparison goods. Furthermore, both the Poundland and Harry Corry units, also located within the District Centre, retail comparison goods. In Lower Berryden the currently vacant Unit 3 is soon to be occupied by Home Bargains which will include a significant proportion of floorspace for the sale of convenience goods. In effect, whereas historically there may have been significant differences between Upper and Lower Berryden in terms of how these locations operated in retail terms, this difference is now much smaller and it would appear more logical to identify the whole of Berryden as a single District Centre comprising both the upper and lower parts.

*Range Retail Offer and Operators*

4.80 Table 4.5 sets out the results of the various surveys of retail and retail services units undertaken for Berryden since 2004.

**Table 4.5: Berryden – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2004 | 1            | 7    | 2            | 1      | 11    | £76.15m      |
| 2012 | 1            | 10   | 3            | 1      | 15    | £107.68m     |
| 2018 | 1            | 8    | 3            | 5      | 17    | £97.81m      |

4.81 The Table shows that there has been a significant increase in vacancies in the whole Berryden area since 2012. These vacancies are concentrated in Lower Berryden (although the vacant Carphone Warehouse unit is in the District Centre). As a result, there has been a reduction in retail turnover within the combined centre but it is still significantly higher than identified in 2004. The reason for this would be the shift over this time period away from bulky goods to a balanced mix of general and bulky comparison goods with higher sales densities. Since the beginning of 2019 the vacant ToysRUs unit has been occupied by Matalan and Home Bargains is due to occupy vacant Unit 3. When both of these stores are trading the number of vacancies will reduce to 3 and the turnover of the combined centre is expected to exceed that identified in 2012.

4.82 Seven of the 9 retail units are operated by national multiples.

#### *Additional Services and Facilities*

4.83 Within the District Centre there are no additional facilities or services but within the retail park there is the Mecca Bingo Hall.

#### *Occupier Demand and Activity*

4.84 Since 2013 applications have been submitted for limited changes to retail units within both the upper and lower parts. In the upper part there have been two consents for smaller units (including the Carphone Warehouse unit) granted for changes of use from Class 1 to non-retail (Classes 2 and 11). In the lower part consent has been granted for slightly increasing the permitted sales of convenience goods from one unit. It has been noted that both Matalan and Home Bargains have recently taken, or agreed to take, space in Lower Berryden.

#### *Rents and Yields*

4.85 Agents are currently seeking ca. £200 psm average rent for the Car Phone Warehouse unit.

#### *Shopper/Household Survey Information*

4.86 The 2013 Report identified that there were above average levels of satisfaction for food shopping and average satisfaction for non-food shopping. There were high levels of satisfaction for ease of access to the centre.

#### *Vacancy Rates*

4.87 Five out of 17 units in the combined area were vacant in 2018 – a vacancy rate of almost 30% and the vacancy rate for floorspace is 18%. This vacancy rate is substantially higher than identified in both 2004 and 2012 and

is significantly above average for centres and retail parks in Scotland. In 2019 this rate will reduce to 18% by number of units and to less than 10% by floor area as a result of the reoccupation of two units.

#### *Accessibility*

- 4.88 First bus services 11 and 12 serve Berryden (both the District and Commercial Centres) linking it to the Kittybrewster, Northfield and the City Centre.

#### *Environment*

- 4.89 The environment of both parts of Berryden is dominated by car parking and vehicular access – there is also poor integration between the upper and lower levels for pedestrians. The building quality is typical of a retail park environment.

#### *Summary*

- 4.90 Functionally Upper Berryden, focussed on the Sainsbury superstore and smaller retail units, has served as a District Centre in a similar manner to that identified for Danestone and Rousay Drive. Although historically Lower Berryden shared characteristics with other retail parks in the City this is changing with a mixture of convenience, general comparison and bulky goods floorspace and, as a result of this, it is recommended that consideration should be given to redesignating the whole of Berryden (Upper and Lower) as a single District Centre.

#### **Prospects and Key Issues**

- 4.91 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) will result in modest growth of available expenditure for convenience goods. Furthermore, new proposals and commitments for convenience floorspace will increase competition for Berryden. As a result, convenience turnover growth will be limited and will, probably, reduce. In contrast the very wide catchment for comparison goods, combined with significant expenditure growth and long-term trends towards market concentration should support future growth of turnover in comparison goods shops – especially for general comparison goods.
- 4.92 Berryden has been adversely affected by the closures of major national multiples (e.g. ToysRUs) which has been a key factor in the substantial increase in vacancies and, although Lower Berryden has struggled over the past few years (in contrast to nearby Kittybrewster which has secured full occupancy over the same time period). One factor may be the configuration of the central part of the centre i.e. where the Toys R Us unit is underneath the parking area for the upper level and the ramp leading between the two levels. It is possible that this awkward configuration has undermined the attractiveness of this location compared to other comparable locations (e.g. Kittybrewster and Bridge of Don). Notwithstanding this, in early 2019 Matalan commenced trading from the ToysRUs unit and Home Bargains will occupy vacant Unit 3. Despite this the difficult configuration and poor linkage between Upper and Lower Berryden remains and, in this respect, the owners of Berryden could be encouraged to work together to consider radical proposals for reconfiguring Berryden although it is likely that the cost of undertaking such alterations in an uncertain market is such that it would be probably difficult to justify

the scale of investment required. Furthermore, any new investment at Berryden should not undermine proposals for major new investment within the City Centre.

4.93 It has been noted that there is quantitative retail deficiency for convenience goods within the central north part of Aberdeen and conversion/occupation of a unit at Berryden (either part) could assist in addressing this deficiency. Inclusion of the lower part of Berryden within the District Centre would be consistent with encouraging additional convenience floorspace in this location.

4.94 Other key issues for Berryden include:

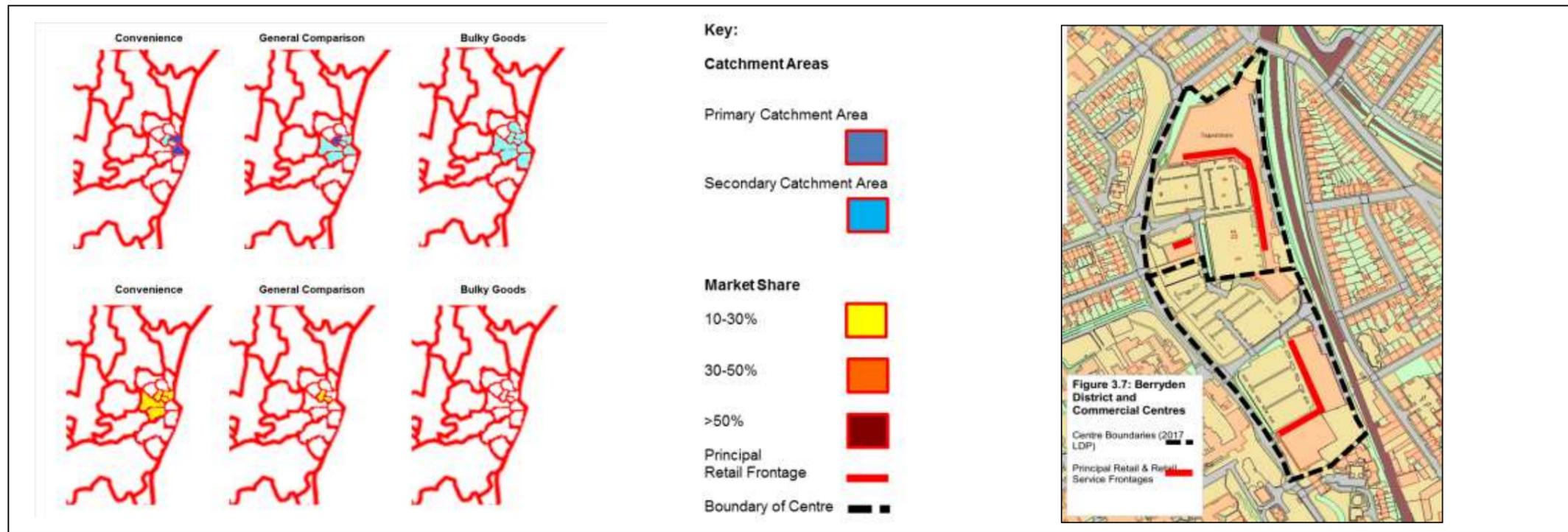
- Potential increases in market growth for comparison goods but restricted growth for convenience goods.
- Increased competition from retail proposals – particularly those in west Aberdeen.
- The lack of provision for pedestrians gaining access to Berryden and, in particular, improving circulation within the District Centre.
- High (but reducing) vacancies.

#### **Review of Retail Strategy**

4.95 Berryden comprises two areas – the upper level identified as a District Centre and the lower level identified as a Commercial centre in the 2017 LDP. The turnover of the centre is very high and is one of the highest of all retail locations within the study area. Turnover grew rapidly between 2004 and 2013 but has since declined and the combined centres suffer from high vacancies. The distinctive characteristics of the two parts is reducing and it is increasingly difficult to justify separate designations between the upper and lower parts of Berryden. Therefore, the recommended Retail Strategy proposes that the whole of Berryden should be included within the District Centre. If this recommendation is not accepted then consideration should be given to amending the boundary between the two parts. Furthermore, encouragement should be given to addressing the issue of vacancies within the centre(s) but any reconfiguration/planning application should not undermine the proposed investments in the City Centre.

4.96 The review of the recommended Retail Strategy proposes:

- Identification of the whole of Berryden (Upper and Lower parts) as a **District Centre** in the retail network.
- Policies to protect Berryden District Centre from adverse impact from retail proposals.
- If the inclusion of Lower Berryden in the District Centre is not accepted then consideration should be given to extending the boundary of the Commercial Centre to include the Harry Corry unit and, possibly, the existing Poundland Unit.
- Potential to include an additional convenience goods unit within Berryden (either part) to assist in addressing the identified quantified deficiency for these goods in this part of Aberdeen.



**Floorspace and Turnover 2018**

|                    | No.       | Convenience |             |                 | General Comparison |             |                 | Bulky Goods |             |                 | All Goods    |              |                 |
|--------------------|-----------|-------------|-------------|-----------------|--------------------|-------------|-----------------|-------------|-------------|-----------------|--------------|--------------|-----------------|
|                    |           | GFA Sq M    | NFA Sq M    | Turnover £/Sq M | GFA Sq M           | NFA Sq M    | Turnover £/Sq M | GFA Sq M    | NFA Sq M    | Turnover £/Sq M | GFA Sq M     | NFA Sq M     | Turnover £/Sq M |
| Retail Goods Shops | 9         | 5092        | 3055        | 38.21           | 12743              | 9049        | 53.88           | 2440        | 1691        | 5.73            | 20275        | 13795        | 97.81           |
| Retail Services    | 3         |             |             |                 |                    |             |                 |             |             |                 | 356          |              |                 |
| Vacant             | 5         |             |             |                 |                    |             |                 |             |             |                 | 4651         | 18%          |                 |
| <b>Total</b>       | <b>17</b> | <b>5092</b> | <b>3055</b> | <b>£38.21m</b>  | <b>12743</b>       | <b>9049</b> | <b>£53.88m</b>  | <b>2440</b> | <b>1691</b> | <b>£5.73m</b>   | <b>25282</b> | <b>13795</b> | <b>£97.81m</b>  |

| 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 |   |  | Planning Policy Approach  |  |
| 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. 2012 surveys identified 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><b>Strengths:</b> Ease of access by private car; high proportion of multiples.</p> <p>Vacancies are now significantly above national average (30% by number of units and 18% by floorspace in 2018).</p> <p><b>Weaknesses:</b> 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><b>Summary:</b> limited applicability of indicators to this centre. Indicators of viability appear relatively weak due to closure of major units in Lower Berryden. An additional weakness is the small number of units that limits the range of facilities, services and goods types available.</p> | Upper Level - District Centre  |   |  |
| 2013           | 1    | 10   | 3                         | 1      | 15    | £107.68m              |   | Lower Level - Commercial Centre (Retail Park)  |   |  |
| 2018           | 1    | 8    | 3                         | 5      | 17    | £97.81m               |   | Protection   |   |  |
|                |      |      |                           |        |       |                       | change 2013-18  | <p><b>Proposed Retail Floorspace</b></p> <p><b>Commitments</b></p> <p><b>Proposals</b></p> | Could consider extending boundary of DC at upper level.   |  |
|                |      |      |                           |        |       |                       | change 2004-18  |  | Small likelihood of being adversely affected by new District Centre proposals for north and west of Aberdeen. |  |

## 5 Aberdeen – Selected Neighbourhood Centres

5.1 This section reviews those neighbourhood centres that had been identified in the 2012 Supplementary Guidance *City Centre and Retailing – Hierarchy of Centres* as District Centres but were subsequently redefined as Neighbourhood Centres in the 2017 LDP. The principal purpose in reviewing these centres is to assess whether there have been changes to the range of facilities and services within the centres that could suggest reallocation back as District Centres within the network of centres. It also considers the retail area at Haudagain to assess whether or not this should be included within the network of centres in the City.

### Culter

#### Description and Health Check

5.2 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.

Figure 5.1: Culter Neighbourhood Centre



*Retail Offer*

5.3 Table 5.1 sets out the results of the various surveys of retail and retail services units undertaken for Culter since 2012.

**Table 5.1: Culter – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2012 | 4            | 5    | 11           | 1      | 21    | £2.61m       |
| 2018 | 3            | 7    | 10           | 2      | 22    | £2.84m       |

5.4 The Table shows that there have been modest changes in units within the centre. Since 2013 the former Culter Car Centre was redeveloped for a ground floor retail unit and dentist surgery with flats above. The main retail unit has been occupied by the Co-op as a small supermarket. In overall terms there has been a slight increase in retail goods turnover of 9%. Vacancies are 10% by number of units and 6% by floorspace. There has been significant investment in the centre providing additional retail and retail services units including a new Co-op convenience-format store.

*Additional Services and Facilities*

5.5 Within the centre of Culter there is a limited range of additional services and facilities:

- Clinic
- Dentist
- Church
- Pubs/Bars (2)
- Church Halls
- Community pop-in centre
- Library

*Catchment Area*

5.6 The catchment area for Culter is limited to Zone 19 (and, more specifically, the community of Peterculter) although shops do benefit from some pass by traffic travelling along North Deeside Road. The same catchment characteristics applied to all retail goods types.

*Conclusions*

5.7 Although Culter centre has benefitted from investment since 2013 it remains a relatively small centre with modest retail turnover (although it is anticipated that this would have increased significantly since 2013). Furthermore, it includes a limited range of additional facilities serving the local community. Nonetheless it remains a small centre and it is considered that it is appropriate to retain its designation as a Neighbourhood Centre in the network.

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### Prospects, Issues and Review of Retail Strategy

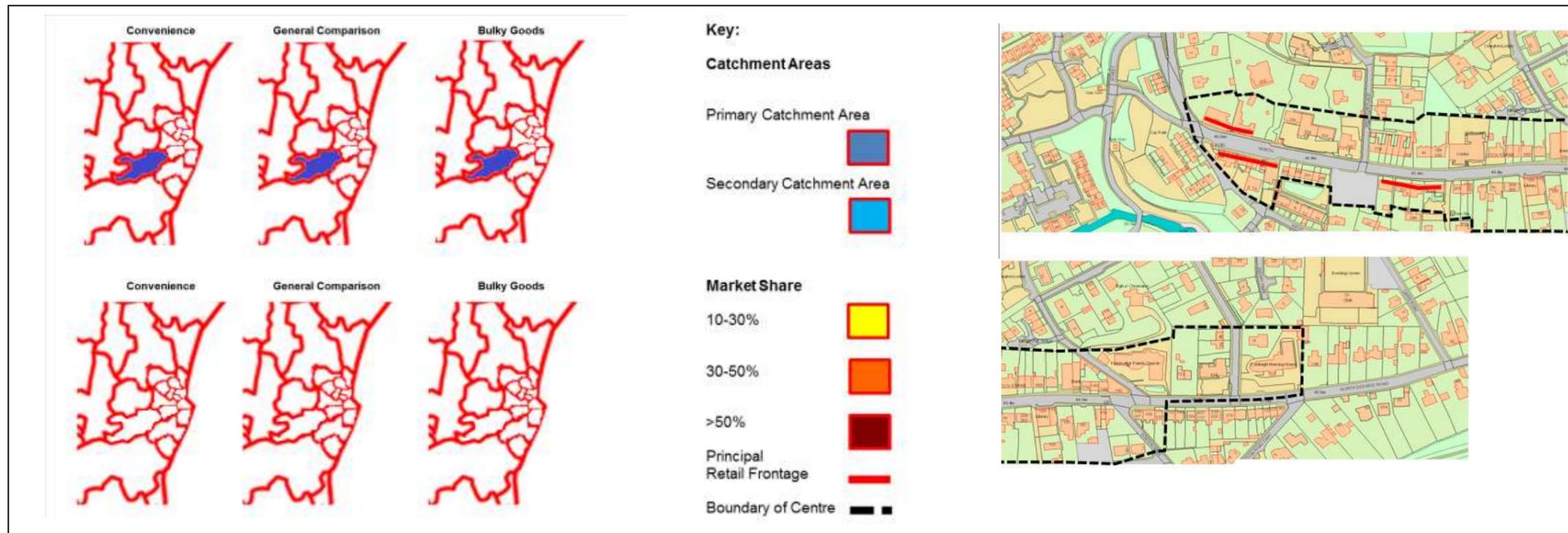
5.8 Culter centre is a small Neighbourhood Centre that serves top-up and local shopping needs of residents in Peterculter. The retail offer is limited but the centre does provide additional non-retail services of importance to the community. Insofar as vitality and viability indicators apply to the centre it demonstrates good levels of vitality and viability but these must be considered in terms of the small nature of the centre.

5.9 The principal issues for Culter are:

- Some population growth associated with additional housing sites.
- Additional competing retail developments at Milltimber linked to major housing allocations.
- Limited range of retail offer and other facilities/services.
- Issues of difficult pedestrian access across North Deeside Road, especially at certain times of the day.

5.10 The review of the retail strategy proposes:

- Continued identification of the Culter as a **Neighbourhood Centre** within the retail network.
- Protection of the centre from adverse retail impact from retail development proposals.



**Floorspace and Turnover 2018**

|                    | 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        | 847         | 550        | 1.73          | 330         | 215                | 0.92          | 99        | 64          | 0.19          | 1276        | 830        | 2.84          |           |          |        |             |
| Retail Services    | 10        |             |            |               |             |                    |               |           |             |               |             |            |               |           |          |        |             |
| Vacant             | 2         |             |            |               |             |                    |               |           |             |               |             |            |               | 145       | 6%       |        |             |
| <b>Total</b>       | <b>22</b> | <b>847</b>  | <b>550</b> | <b>£1.73m</b> | <b>330</b>  | <b>215</b>         | <b>£0.92m</b> | <b>99</b> | <b>64</b>   | <b>£0.19m</b> | <b>2558</b> | <b>830</b> | <b>£2.84m</b> |           |          |        |             |

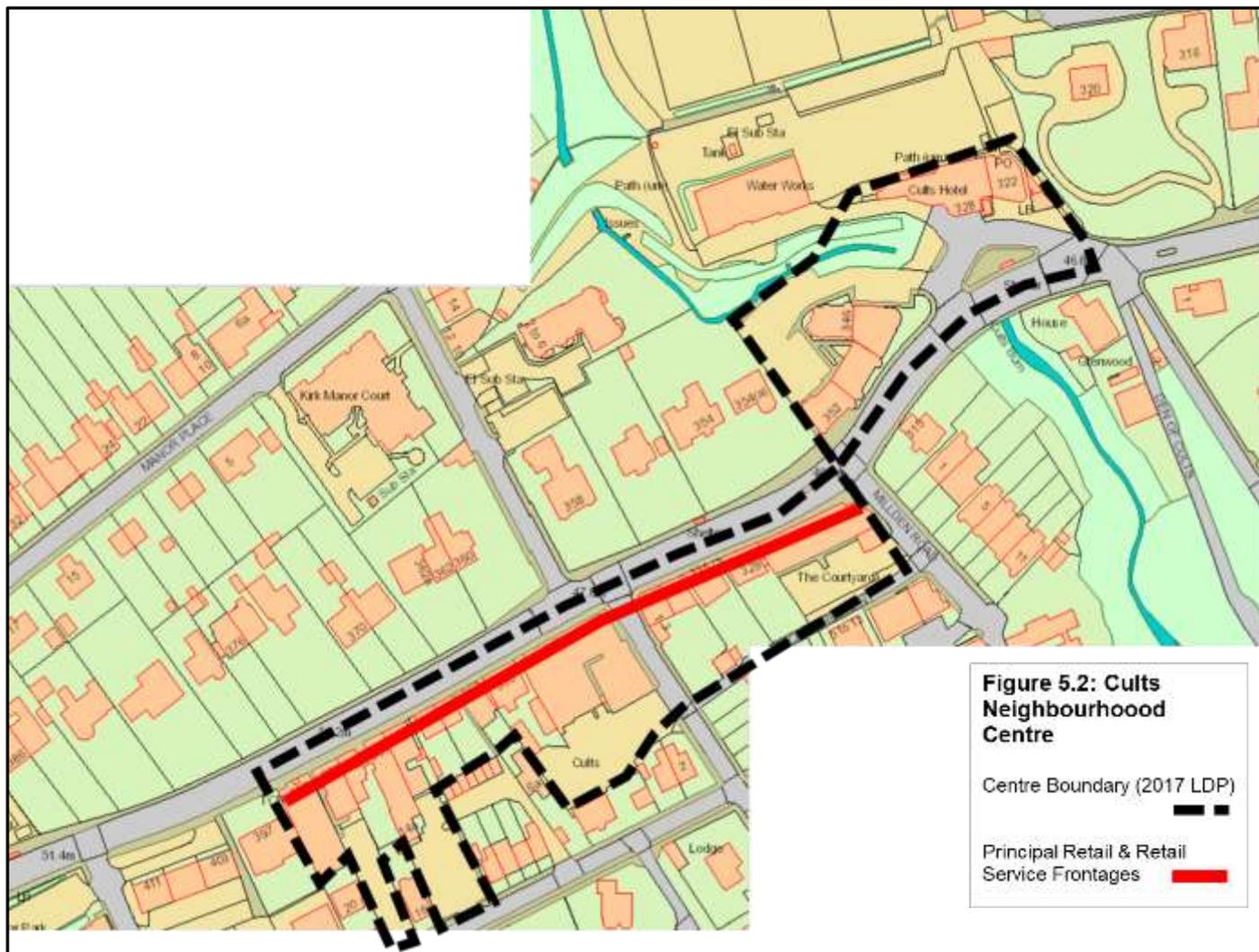
| Recent Changes |      |      |              |   |       |                       | Retail Goods Turnover £m  | Vitality and Viability Summary | Retail Strategy Summary    |  |
|----------------|------|------|--------------|---|-------|-----------------------|---|--------------------------------|----------------------------|--|
| Year           | Conv | Comp | No. of Units |   | Total | Centre Classification |   |                                | Local/Neighbourhood Centre |  |
| 2013           | 4    | 0    | 10           | 2 | 16    | £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 2018 were 10% by number of units and 6% by floor area. Recent investment has slightly improved the retail offer in the centre resulting in modest increase in turnover.. | Planning Policy Approach       | Protection                 |  |
| 2018           | 3    | 7    | 10           | 2 | 22    | £2.84m                |   | Proposed Retail Floorspace     |                            |  |
|                |      |      |              |   |       |                       | change 2013-18  |                                | Commitments                |  |
|                |      |      |              |   |       |                       | 9%  |                                | Proposals                  |  |

## Cults

### Description and Health Check

5.11 Cults centre is a small retail location mostly on the south side of the North Deeside Road in the centre of Cults.

Figure 5.2: Cults Neighbourhood Centre



### Retail Offer

5.12 Table 5.2 sets out the results of the various surveys of retail and retail services units undertaken for Cults since 2004.

Table 5.2: Cults – Results of Retail Surveys

| Year | No. of Units |      |              |        |       | Retail Goods Turnover £m |
|------|--------------|------|--------------|--------|-------|--------------------------|
|      | Conv         | Comp | Ret Services | Vacant | Total |                          |
| 2004 | 3            | 10   | 19           | 2      | 34    | £4.74m                   |
| 2012 | 3            | 11   | 15           | 2      | 31    | £6.18m                   |
| 2018 | 2            | 7    | 15           | 0      | 24    | £12.27m                  |

- 5.13 The Table shows that there have been reductions in the numbers of retail goods shops in Cults although the total retail floorspace has not significantly changed. A key factor has been the creation of larger units for both Sainsbury and Tesco which has resulted in a significant uplift in retail turnover. There are no vacancies in the centre.

#### *Additional Services and Facilities*

- 5.14 Within the centre of Cults there is a limited range of additional services and facilities:

- Clinic
- Dentists (2)
- Vet
- Nursery
- Accountants
- Hotel

#### *Catchment Area*

- 5.15 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 applied to all retail goods types.

#### *Conclusions*

- 5.16 Although relatively small Cults centre provides significant convenience shopping for the local community. There has been significant recent investment by both Sainsbury and Tesco resulting in higher retail turnover and no vacancies within the centre. It remains an important neighbourhood centre serving the local community. Cults centre remains a relatively small centre with relatively lower retail turnover and has a limited range of additional facilities serving the local community. It is considered that it is appropriate to retain its designation as a Neighbourhood Centre in the network.

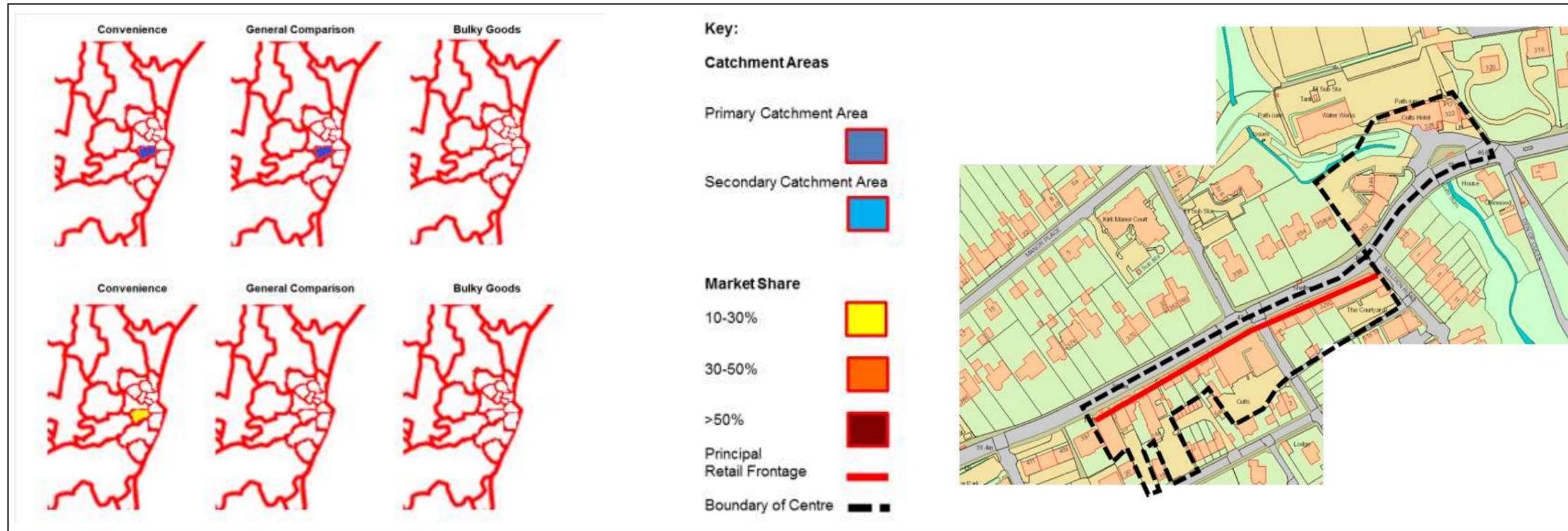
#### **Prospects, Issues and Review of Retail Strategy**

- 5.17 The future prospects for shops in Cults reflect a combination: of population growth in Cults (site OP41); general expenditure growth – particularly for comparison goods; major housing allocations at Countesswells and elsewhere; major new retail development in west Aberdeen (although this is primarily to the north west of the City) and broader market changes. In terms of turnover Cults has benefitted from growth in convenience-format retailing, particularly with Tesco and Sainsbury, with the result that the centre is now fully occupied. It is likely that demand will remain strong but there are no obvious sites that would allow modest extensions to the centre.
- 5.18 The principal issues for Cults are:
- Sustaining the current strength of the centre.

- Limited retail offer – primarily serving local walk-in trade from the surrounding community but also pass-by trade.
- Issues associated with pedestrian movement across the North Deeside Road.

5.19 The review of the Retail Strategy proposes:

- Continued identification of the Cults as a **Neighbourhood Centre** within the retail network.
- Protection of the centre from adverse retail impact from retail development proposals.



**Floorspace and Turnover 2018**

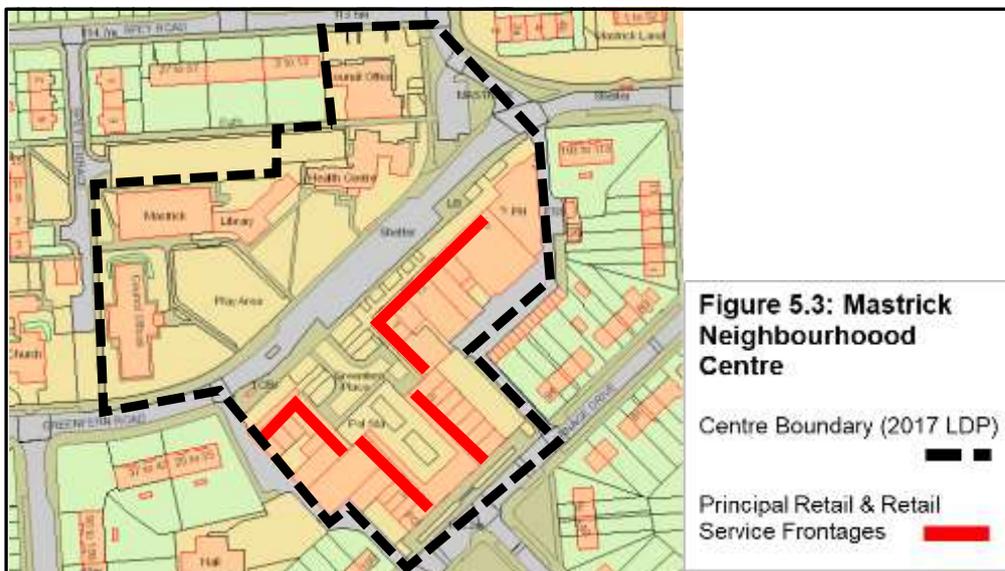
|                    | No.       | Convenience |             |                 | General Comparison |            |                 | Bulky Goods |          |                 | All Goods   |             |                 |
|--------------------|-----------|-------------|-------------|-----------------|--------------------|------------|-----------------|-------------|----------|-----------------|-------------|-------------|-----------------|
|                    |           | GFA Sq M    | NFA Sq M    | Turnover £/Sq M | GFA Sq M           | NFA Sq M   | Turnover £/Sq M | GFA Sq M    | NFA Sq M | Turnover £/Sq M | GFA Sq M    | NFA Sq M    | Turnover £/Sq M |
| Retail Goods Shops | 9         | 1727        | 1123        | 10.45           | 708                | 460        | 1.83            | 0           | 0        | 0.00            | 2435        | 1582        | 12.27           |
| Retail Services    | 15        |             |             |                 |                    |            |                 |             |          |                 | 1309        |             |                 |
| Vacant             | 0         |             |             |                 |                    |            |                 |             |          |                 | 0           |             |                 |
| <b>Total</b>       | <b>24</b> | <b>1727</b> | <b>1123</b> | <b>£10.45m</b>  | <b>708</b>         | <b>460</b> | <b>£1.83m</b>   | <b>0</b>    | <b>0</b> | <b>£0.00m</b>   | <b>3744</b> | <b>1582</b> | <b>£12.27m</b>  |

| Recent Changes |      |      |                |   |       |                       | Retail Goods Turnover £m   | Vitality and Viability Summary | Retail Strategy Summary    |           |
|----------------|------|------|----------------|---|-------|-----------------------|--|--------------------------------|----------------------------|-----------|
| Year           | Conv | Comp | No. of Units   |   | Total | Centre Classification |  |                                | Local/Neighbourhood 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. There were no vacancies in 2018. The reduction in number of units reflects amalgamation of units. The strength of Sainsbury's Local Store has significantly increased turnover in the centre. | Planning Policy Approach       | Protection                 |           |
| 2013           | 3    | 11   | 15             | 2 | 31    | £6.18m                |  | Proposed Retail Floorspace     | Commitments                |           |
| 2018           | 2    | 7    | 15             | 0 | 24    | £12.27m               |  |                                |                            | Proposals |
|                |      |      | change 2013-18 |   |       | +99%                  |  |                                |                            |           |
|                |      |      | change 2004-18 |   |       | +159%                 |  |                                |                            |           |

## Mastrick

5.20 Mastrick centre is a small retail centre located in the west of the City.

**Figure 5.3 Mastrick Neighbourhood Centre**



### Retail Offer

5.21 Table 5.3 sets out the results of the various surveys of retail and retail services units undertaken for Mastrick since 2004.

**Table 5.3: Mastrick – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods Turnover £m |
|------|--------------|------|--------------|--------|-------|--------------------------|
|      | Conv         | Comp | Ret Services | Vacant | Total |                          |
| 2004 | 5            | 4    | 8            | 0      | 17    | £3.79m                   |
| 2012 | 7            | 4    | 11           | 1      | 23    | £5.64m                   |
| 2018 | 6            | 4    | 10           | 2      | 22    | £5.12m                   |

5.22 The Table shows that there have been very limited changes in retail and retail service provision in Mastrick since 2013. There has been a net loss of one retail/retail service unit and an increase in vacancies (from 1 to 2) although it should be noted that the vacancy rate remains relatively low. Turnover of the centre is slightly lower in 2018 compared to 2012 (-9%) but remains significantly higher than 2004.

### Additional Services and Facilities

5.23 Within the centre of Mastrick there is a limited range of additional services and facilities:

- Community Centre
- Dentist
- GP Surgery
- Library
- Pub/Bar

- MSP Office

#### *Catchment Area*

5.24 The catchment area for Mastrick is limited. It noted that although the retail model identified the catchment area to be Zone 28 it was evident that the catchment was limited to the community of Mastrick with limited pass by trade. The same catchment characteristics apply to all retail goods types.

#### *Conclusions*

5.25 Mastrick centre remains a relatively small centre with relatively lower retail turnover and has a limited range of additional facilities serving the local community. It is considered that it is appropriate to retain its designation as a Neighbourhood Centre in the network.

#### **Prospects, Issues and Review of Retail Strategy**

5.26 The future prospects for shops in Mastrick reflect a combination of: general expenditure growth – particularly for comparison goods; major housing allocations at Maidencraig, Greenfearns and elsewhere; major new retail development serving west Aberdeen; and continued trends supporting local convenience shopping. Taking these factors together it is estimated that turnover will remain broadly steady in the long term.

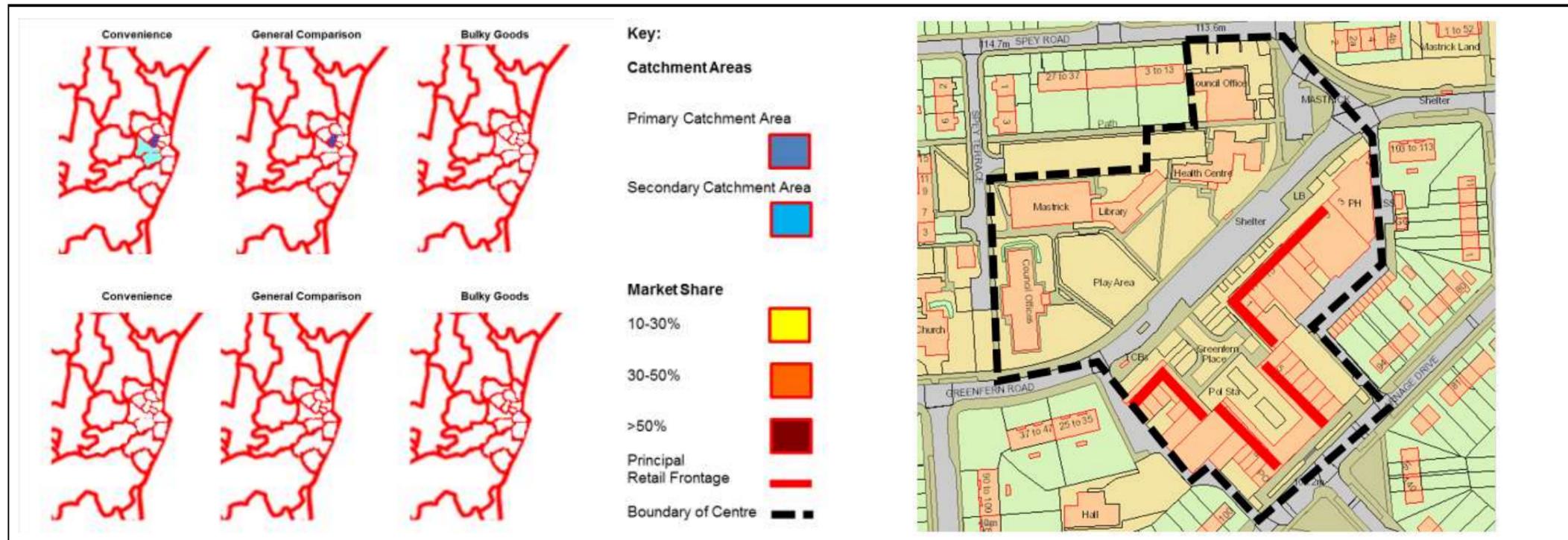
5.27 The most significant issue is the future use of the Mastrick Clinic site/building which is located on the north side of Greenfearns Road (0.13ha). The site has been identified as part of the call for sites process for the new LDP but no specific proposals are identified. Given its location this provides an opportunity for enhancing the ranges of retail, services and facilities within the neighbourhood centre although there is a concern that the mostly likely/easiest development option would be for housing.

5.28 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.
- Redevelopment of the Mastrick Clinic.

5.29 Mastrick centre is a small 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. The Mastrick Clinic site offers potential for enhancing the retail/services available within the centre. The review of the Retail Strategy proposes:

- Continued identification of Mastrick as a **Neighbourhood Centre** within the retail network.
- Protection of the centre from adverse retail impact from retail development proposals.
- Encouragement of retail, retail service or other similar town centre use on the site to complement the neighbourhood centre uses opposite.



**Floorspace and Turnover 2018**

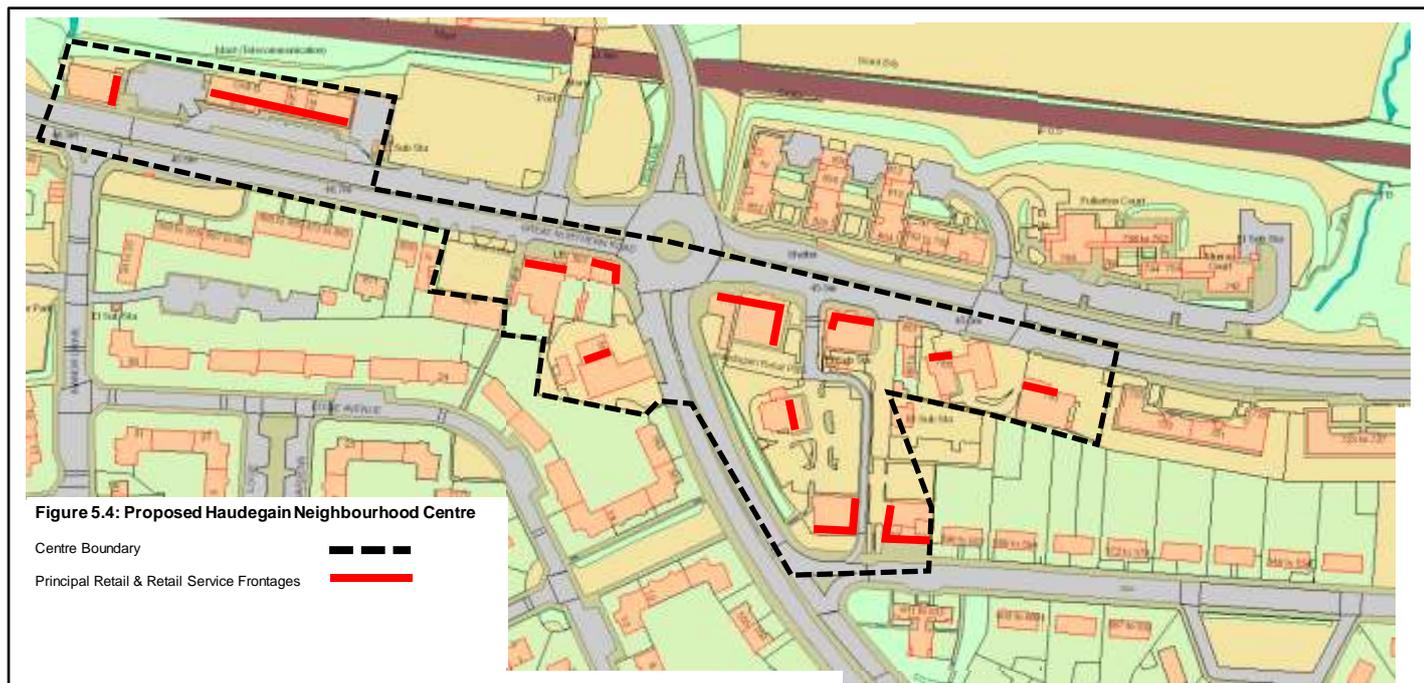
|                    | No.       | Convenience |            |                 |             | General Comparison |               |                 |             | Bulky Goods   |             |                 |               | All Goods |          |                 |             |
|--------------------|-----------|-------------|------------|-----------------|-------------|--------------------|---------------|-----------------|-------------|---------------|-------------|-----------------|---------------|-----------|----------|-----------------|-------------|
|                    |           | 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 | 10        | 951         | 618        | 2.80            |             |                    |               |                 | 0           | 0             | 0.00        |                 |               | 2098      | 1364     |                 | 5.12        |
| Retail Services    | 10        |             |            |                 |             |                    |               |                 |             |               |             |                 |               | 1434      |          |                 |             |
| Vacant             | 2         |             |            |                 |             |                    |               |                 |             |               |             |                 |               | 94        |          |                 |             |
| <b>Total</b>       | <b>22</b> | <b>951</b>  | <b>618</b> | <b>£2.80m</b>   | <b>1147</b> | <b>746</b>         | <b>£2.32m</b> | <b>0</b>        | <b>0</b>    | <b>£0.00m</b> | <b>3626</b> | <b>1364</b>     | <b>£5.12m</b> |           |          |                 |             |

| Recent Changes |      |      |                           |        |       |                          | Vitality and Viability Summary  |  | Retail Strategy Summary    |                            |  |
|----------------|------|------|---------------------------|--------|-------|--------------------------|---|--|----------------------------|----------------------------|--|
| Year           | Conv | Comp | No. of Units Ret Services | Vacant | Total | Retail Goods Turnover £m | Indicators of vitality and viability include the following:   |  | Centre Classification      | Local/Neighbourhood Centre |  |
| 2004           | 5    | 4    | 8                         | 0      | 17    | £3.79m                   | The 2012 survey identified 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.<br><br><b>Strengths:</b> Good quality environment in town centre; good range of independents; ease of access; range of additional facilities and services; below average vacancies.<br><br><b>Weaknesses:</b> 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 (5% by number of units and 5% by floorspace in 2018).<br><br><b>Summary:</b> generally strong indicators of vitality and viability for a centre of this limited size. |  | Centre Classification      | Local/Neighbourhood Centre |  |
| 2013           | 7    | 4    | 10                        | 2      | 23    | £5.64m                   |   |  | Planning Policy Approach   | Protection                 |  |
| 2018           | 6    | 4    | 10                        | 2      | 22    | £5.12m                   |   |  | Proposed Retail Floorspace | Proposals                  |  |
|                |      |      |                           |        |       |                          | change 2013-18  |  |                            |                            |  |
|                |      |      |                           |        |       |                          | change 2004-18  |  |                            |                            |  |

## Haudagain

5.30 The area around the Haudagain roundabout is not identified within the existing network of centres within the current LDP. This section considers the range retail, retail service and other services/facilities in this locality and concludes that it would be appropriate to include Haudagain as a new Neighbourhood Centre within the network of centres. Figure 5.4 shows the principal retail and service frontages in the Haudagain area and the proposed boundary for the new Neighbourhood Centre.

**Figure 5.4: Proposed Haudagain Neighbourhood Centre**



### Retail Offer

5.31 In November 2018 the following retail and retail services uses were identified in the Haudagain area:

- 6 convenience goods shops – including a small Farmfoods store, one CTN, an off-license, one general store and two general grocery stores in PFS forecourts.
- 6 comparison goods shops including three bulky goods retailers (furniture and carpets) and three general comparison (including two sports related stores).
- 5 retail services (including drive-thru restaurants)
- 1 vacant unit.

5.32 The turnover of these shops is estimated at £4.29m.

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*Additional Services and Facilities*

5.33 No additional non-retail services or facilities were identifiable in this area.

*Review of Function of Centre*

5.34 It is considered that, in combination, the convenience retail units provide an important local facility to the immediate neighbourhood, as well as pass-by trade. The comparison goods units are expected to serve a wider market area. The retail services serve both a local catchment (notably health and beauty and hot food carry-out) but also pass-by trade for traffic travelling along the main roads.

5.35 Even though the location does not provide any additional services or facilities it is considered that, taking the above factors together, these units form a reasonable coherent whole appropriate for designating the Haudegain area as a local/neighbourhood centre within the network of centres. Figure 5.4 also identifies a possible boundary for this centre based on the distribution of the retail/retail service units.

**Prospects, Issues and Review of Retail Strategy**

5.36 The future prospects for shops in Haudegain are limited by low rates of expenditure growth – the centre is not located close to major new housing areas but it should continue to benefit from the current strength of shopping locally (particularly for convenience goods). In overall terms it is estimated that turnover will remain broadly steady in the long term.

5.37 Haudegain would be affected by the proposals for the realignment of the junction of the A90 and A96. The effects on the local shops at Haudegain is uncertain – the reduction in pass-by trade could have a negative impact whereas it could also create opportunities for improved local access and parking which would benefit local businesses. The principal issues for Haudegain are:

- Limited growth in turnover in the long term.
- Limited retail offer – primarily serving local walk-in trade from the surrounding community.
- Impact of improved A90/A96 junction.

5.38 The review of the Retail Strategy proposes:

- Identification of Haudegain as a new **Neighbourhood Centre** within the retail network.
- Protection of the centre from adverse retail impact from retail development proposals.

5.39 Haudegain provides a limited range of both retail goods and retail services for the immediately locality (as well as to pass-by trade).



| Floorspace and Turnover 2018 |           |               |                 |                 |                    |               |                 |                 |               |               |                |                 |               |                |                 |  |               |
|------------------------------|-----------|---------------|-----------------|-----------------|--------------------|---------------|-----------------|-----------------|---------------|---------------|----------------|-----------------|---------------|----------------|-----------------|--|---------------|
|                              | 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   |                |                 |  |               |
| Retail Goods Shops           | 12        | 803           | 522             |                 | £2.23m             | 728           | 473             |                 | £0.96m        | 563           | 366            |                 | £1.10m        | 2094           | 1361            |  | £4.29m        |
| Retail Services              | 5         |               |                 |                 |                    |               |                 |                 |               |               |                |                 |               | 696            |                 |  |               |
| Vacant                       | 1         |               |                 |                 |                    |               |                 |                 |               |               |                |                 |               | 325            |                 |  |               |
| <b>Total</b>                 | <b>18</b> | <b>802.67</b> | <b>521.7355</b> |                 | <b>£2.23m</b>      | <b>727.83</b> | <b>473.0895</b> |                 | <b>£0.96m</b> | <b>563.02</b> | <b>365.963</b> |                 | <b>£1.10m</b> | <b>2093.52</b> | <b>1360.788</b> |  | <b>£4.29m</b> |

| 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                  | Local/Neighbourhood Centre (recommended) |
| 2018           | 6    | 6    | 5                         | 1      | 18    | £4.29m                   | Haudegain comprises a grouping of retail units located adjacent to the junction of the A92 and A96 together with units to the north west of the junction. No additional non-retail facilities or services are provided. The small scale of the centre limits the applicability of indicators of vitality and viability. The area serves both local walk-in trade and | Protection                             |  |
|                |      |      |                           |        |       |                          |  | Proposed Retail Floorspace Commitments |  |
|                |      |      |                           |        |       |                          |  | Proposals                              |  |

## 6 Aberdeen – Commercial Centres

6.1 In general, Commercial Centres can be considered to differ from town or district centres in terms of either the mix of uses or activities within the centre or in terms of the relationship between the centre and the surrounding community. This was addressed in the 2013 Strategy and it is considered that there has been no significant difference in terms of the operation and character of these centres, their relationship to local areas and the planning policy framework relevant to these centres since that Report was prepared.

- Mix of uses or activities: SPP considers that commercial centres are those “centres which have a more specific focus on retailing and/or leisure uses, such as shopping centres, commercial leisure developments, mixed retail and leisure developments, retail parks and factory outlet centres” (SPP para 63). The 2017 LDP defines District Centres as “groups of shops outwith the City Centre, usually containing at least one food supermarket or superstore and non-retail services. These may take a variety of forms”. The LDP does not define Commercial Centres although the Supplementary Guidance: Hierarchy of Centres identifies the policy approach for Commercial Centres to be “support for bulky goods only.. subject to sequential test”
- Relationship to Local Community: due to the relatively rapid growth of Aberdeen during the latter part of the last century the city does not have a well-developed network of traditional district or town centres that form a focus for a local community. Instead, in a number of areas, especially to the west and north of the city, major superstores with limited additional retail/service units provide an important facility for providing, primarily grocery, needs but also a limited range of additional services. These locations include Danestone, Dyce, Middleton Park and Rousay Drive. In terms of the ranges of activities and uses these locations could be considered to meet the definition of Commercial Centres set out SPP, but because of the importance of these facilities to the surrounding community, and lack of easy access to alternatives, it is appropriate for these to be identified as District Centres and to benefit from policy protection as such in the LDP.
- A further attribute of these retail locations is one of scale, especially in terms of turnover, in that they are substantially larger than neighbourhood centres.

6.2 In the 2013 Report it was concluded that, in terms of distinguishing between Commercial and District Centres, it was appropriate to consider Commercial Centres in Aberdeen as being those locations which have *both* a specific focus on retail or leisure uses *and* do not have a close functional inter-relationship with the surrounding community. Furthermore, it identified that regard should also be had to the scale of floorspace/turnover of the location. A good indicator of this inter-relationship is that District Centres, unlike Commercial centres, achieve a relatively high level of market penetration (or market-share) within a clearly identifiable part of the city. It is considered that this approach remains valid in the current review.

6.3 This review therefore updates the analysis of Commercial Centres undertaken in the 2013 Report assessing:

- The role, function and changes in indicators of viability since 2013 (noting that concepts of vitality are less applicable to these locations).
- Their prospects and other key issues facing these locations.

- An update of the retail strategy that is recommended to be adopted for the role of these centres within the retail strategy in the emerging new LDP.

## Boulevard/Links Road

### Description and Health Check

6.4 The Boulevard Retail Park is adjacent to the Beach area, to the east of the City Centre. The retail park comprises a range of convenience, general comparison and bulky goods retail units with limited retail service provision. In total the retail park has 12 retail warehouses plus two smaller service units. Figure 6.1 shows the location of the retail park.

**Figure 6.1: Boulevard Retail Park**



### Catchment Area

6.5 The update of the retail model identifies the following characteristics of the retail park’s catchment area and penetration rates within study zones:

- The catchment areas for Boulevard RP are identified to be less extensive than other retail park locations even for general comparison goods. For convenience goods the primary catchment area and secondary catchment area comprises Zones 30, 26 and 27 – primarily running 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 was identified to be only 18% maximum (Zone 30) for convenience goods and lower levels elsewhere.

- The market area served for bulky comparison goods was wider but with low levels of market penetration – identified to be no higher than 10%. The position with general comparison goods was similar to that for bulky goods in terms of catchment area but penetration levels are very low.

6.6 The above analysis affirms that undertaken in 2013 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. This, combined with the limited immediate residential catchment, maintains the conclusion that the Boulevard RP should not be identified as a District Centre.

#### *Retail Offer*

6.7 Table 6.1 summarises the retail provision within the Boulevard RP since 2004.

**Table 6.1: Boulevard Retail Park – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2004 | 0            | 20   |              |        | 20    | £29.42m      |
| 2012 | 2            | 7    | 0            | 3      | 12    | £73.65m      |
| 2018 | 3            | 7    | 2            | 2      | 14    | £68.82m      |

6.8 The reduction in units between 2004 and 2012 was the result of the redevelopment of the northern part of the retail park for Asda. Since 2012 there has been the addition of two small retail service units and increase of one convenience goods unit. However, despite these changes turnover is less than identified in 2013 resulting in some increases in competition from additional convenience units in the north of the city affecting parts of its catchment area.

#### *Additional Services and Facilities*

6.9 The retail park does not provide any additional services or facilities.

#### *Indicators of Vitality and Viability*

6.10 The nature of Boulevard as a retail park, 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 retail park is limited – there are only 12 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 only two retail service units. Linked to one sports retail unit there is a gym.
- *Shopper/household survey information:* The 2013 report noted that there were above average levels of satisfaction for food shopping and average satisfaction for comparison goods. There were also high

levels of satisfaction for ease of access to the centre. Overall there were 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:* no information is available on pedestrian flows.
- *Vacancy rates:* In 2018 there are 2 vacant units (14% vacancy rate by number of units but only 6% by floor area).
- *Environment:* the environment is dominated by car parking and vehicular access. The building quality is typical of a retail park environment.

### Summary

- 6.11 The character and function of Boulevard Retail Park has not changed significantly since 2013. As a retail park it conforms to the conventional concept of a Commercial Centre. The analysis of the relationship of the retail park to the surrounding area does *not* support redesignation as a District Centre within the retail hierarchy.

### Prospects and Key Issues

- 6.12 The catchment area served by shops in the Boulevard RP is not identified to benefit from significant population growth. As a result, limited growth in available expenditure for convenience goods is identified and growth for comparison goods expenditure is more limited than other areas. Future expenditure growth for convenience goods is expected to be limited although, given its wide catchment for comparison goods, it will benefit from increased expenditure for these categories of goods.
- 6.13 Within the retail park itself there is limited opportunity for the provision of new retail floorspace for new development although there has continued to be some expansion through the provision of mezzanine floorspace. To the east of the retail park is the leisure area associated with Aberdeen beach – this area includes The Range for discount non-food (bulky and general comparison) goods.

### Review of Retail Strategy

- 6.14 Boulevard Retail Park is a purpose-built retail park located to the east of the City Centre. Turnover grew rapidly between 2004 and 2013 but has since declined as a result of competition from new convenience operators in the north of the city. The centre retains generally strong indicators of viability but has limited additional facilities and services apart from shopping and therefore has limited vitality.
- 6.15 The recommended Retail Strategy proposes:
- Continued identification of Boulevard Retail Park as a **Commercial Centre** within the retail network.



## Denmore/Bridge of Don

### Description and Health Check

- 6.16 Within Denmore there are three general locations for retail floorspace that are considered in this review:
- Bridge of Don Retail Park located at the northern end of Denmore Road close to its junction with the B999.
  - Opportunity Site OP75.
  - Dispersed retail warehouse units located along Denmore Road.
- 6.17 In November 2018 there were 10 retail units located along Denmore Road: 6 located in the Bridge of Don Retail Park and a further four units further to the south. In total this area comprises: one convenience goods supermarket (M&S Foodhall); two general comparison goods units; and 7 bulky goods units. In 2012 there were 9 bulky goods retail warehouse units identified in this area. There are no vacant units in 2018. The location of retail units in this area is shown in Figure 6.2.

#### *Bridge of Don Retail Park*

- 6.18 Figure 6.2 shows the location of the Bridge of Don Retail Park located on the east side of Denmore Road. Existing retail units were refurbished following grant of consents over 2014/16 and were completed in 2017. This provides for a small retail park comprising 6 units – one convenience, 2 general comparison, 2 bulky goods and one retail service. Turnover in 2018 is estimated to be £28.59m.

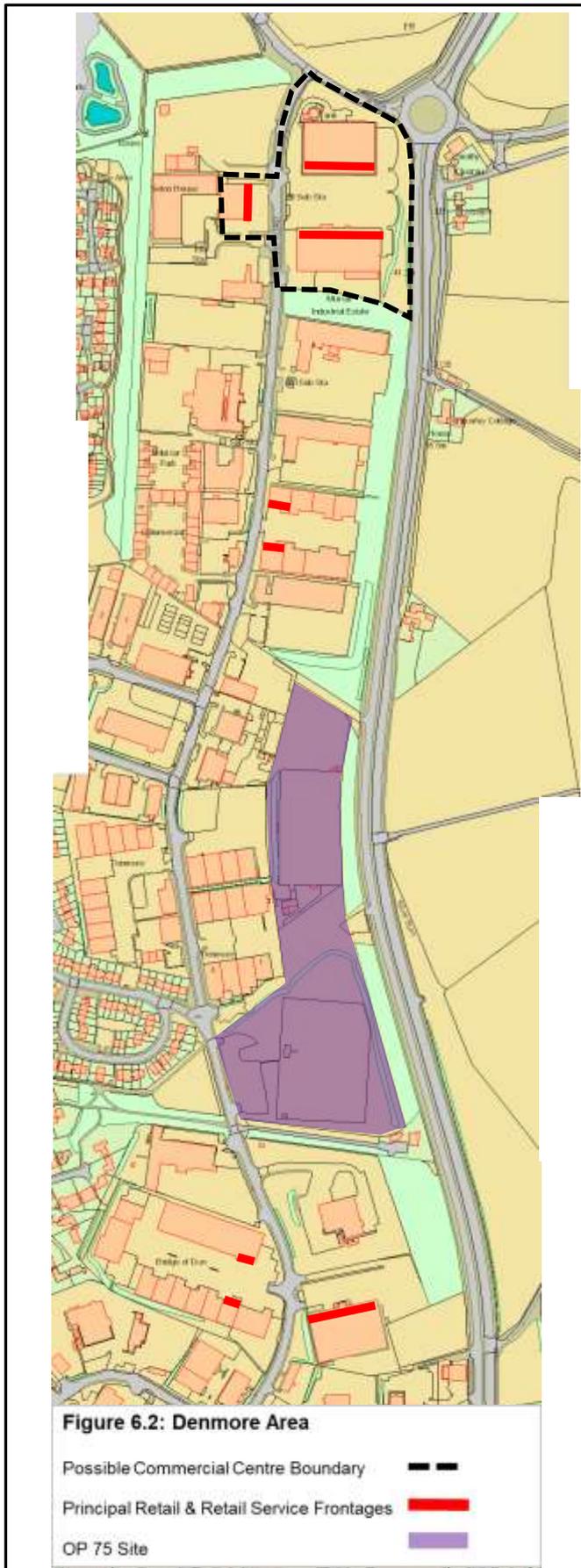
#### *Additional Retail Units*

- 6.19 Figure 6.2 also shows the location of other retail units in the Denmore Road area. There are three locations:
- Topps Tiles located opposite the Bridge of Don Retail Park.
  - Two medium units located towards the centre of Denmore Road – both of these are kitchen/bedroom furniture fitting companies.
  - Three bulky goods units towards the southern end of Denmore Road – two within the Bridge of Don Industrial Estate (Screwfix and Benson/Harveys) and, immediately opposite on the east side of Denmore Road, Sterling Furniture.

#### *Opportunity Site OP75*

- 6.20 Site OP75 is identified as an opportunity site for a new Commercial Centre in the current LDP. The text describes this in the following terms: *if the bulky goods uses at the existing commercial centre at north Denmore Road are displaced this site can be developed for bulky goods in order to maintain the retail offer in Bridge of Don...*No planning application has been submitted for the development of this site.

Figure 6.2: Denmore/Bridge of Don



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*Review*

- 6.21 The redevelopment to form the Bridge of Don Retail Park, together with the adjacent Topps Tiles unit provides a coherent retail location. The catchment area for the whole of this area is identified to comprise a limited part of the north of the city extending well into Aberdeenshire. The M&S Foodhall is also identified to have an extensive catchment comprising both parts of the north of Aberdeen and rural areas in Aberdeenshire. Market penetration rates are, however, low and are highest for bulky goods which remains the predominant type of retail found in this area. This, combined with the limited range of additional facilities and services, would lead to the conclusion that this locality should not be considered a District Centre. Nonetheless it would be reasonable to consider that this area (shown within the boundary on Figure 6.2) should be designated as a Commercial Centre within the network of centres.
- 6.22 If the retail park is designated as a Commercial Centre one would have to question whether OP75 is required in the new LDP. Section 5 of Volume 1 of this report has identified that there will be significant quantitative retail deficiencies for bulky goods in the future, particularly from 2027 onwards. Given the existing bulky goods units within the Denmore Road area it would seem reasonable to consider that OP75 is well located for potential additional bulky goods units in future years. On this basis it is recommended that OP75 is retained as a site for future bulky goods retailing.
- 6.23 The remaining retail units in Denmore are in two locations – the two furniture fitting outlets and the three retail outlets towards the southern end of Denmore Road. The fitted furniture outlets, although including significant retail functions are best described as quasi-retail and these types of uses are frequently located in industrial areas. In contrast the three southern units are more conventional retail (although Screwfix can be considered more as a trade counter operation) but are located quite close to each other. There is no indication at the current time that there is any pressure on these units to relocate.

*Indicators of Vitality and Viability*

- 6.24 The nature of the Bridge of Don area comprising a disparate group of retail warehouse units and retail park makes it difficult to apply the concepts of vitality and viability:
- *Range of Retail offer:* the range of shops available within this area retail park is limited – there are only 10 retail goods shops and these are limited in the types of retail categories that are provided. However, the shop units are large.
  - *Range of retail and non-retail services:* there is only one retail service unit.
  - *Shopper/household survey information:* None available.
  - *Types of retail operator:* retailing in the Bridge of Don is dominated by national multiples with no independents.
  - *Pedestrian flows:* no information is available on pedestrian flows.
  - *Vacancy rates:* In 2018 there were no vacancies.

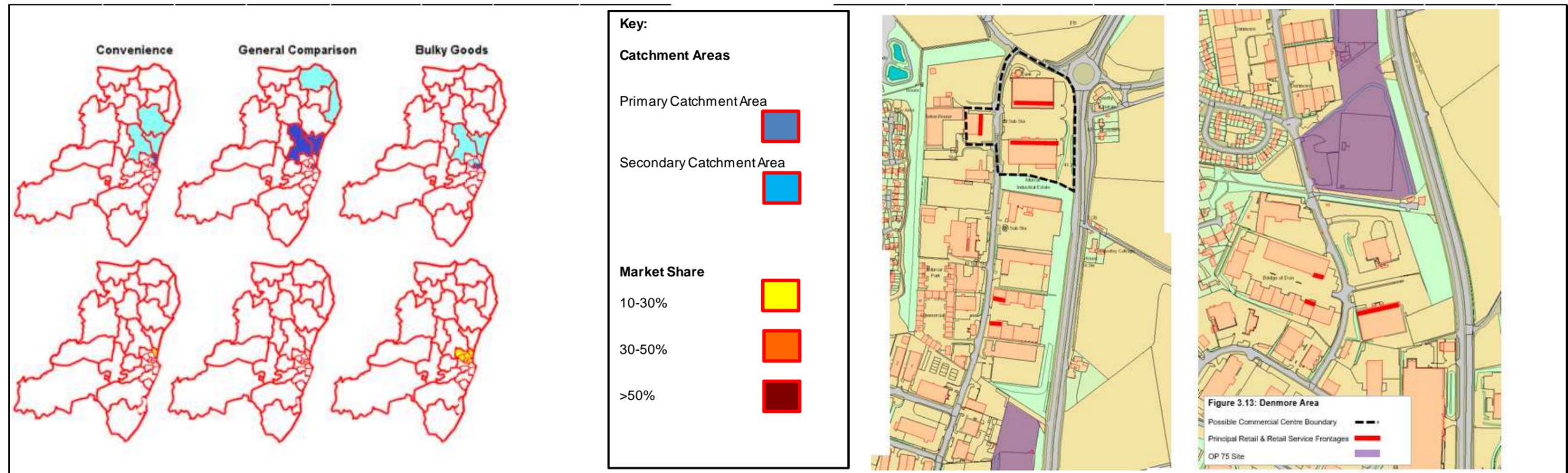
- *Environment:* the environment is dominated by large industrial units dominated by access for cars and HGVs.

### **Prospects and Key Issues**

- 6.25 The consolidation and physical works undertaken to form the new retail park has created a more distinct retail destination. This has been reinforced with the M&S Foodhall which has a relatively wide trade draw (the nearest next M&S is located at Stoneywood) including from significant parts of the City as well as from Aberdeenshire. However, notwithstanding this unit, the predominant type of retail in this location is for bulky goods and this is, effectively, the key location for bulky goods for the north of the City which will benefit from trade from the large scale new housing being developed in this part of the city. It is therefore anticipated that, reflecting both expenditure growth and population growth within its core market areas, turnover will continue to increase over the next ten years or more.
- 6.26 As noted above the current LDP allocated site OP75, although not yet attracting development interest, remains a reasonable location if additional turnover for bulky goods leads to market interest for new bulky goods units. This allocation should therefore remain since it would provide a good location for future growth and, if appropriate, consolidation of the existing bulky goods units located in the southern/central parts of Denmore Road.

### **Review of Retail Strategy**

- 6.27 The Bridge of Don Retail Park has provided a focus for retail units within the Denmore Road area and has proved very successful. In addition to the retail park there remain a number of major bulky goods retailers within this area and the prospects are that these will grow in terms of turnover and, potentially, also in terms of new floorspace. The continued allocation of OP75 for bulky goods will support this in terms of providing a location that is well related to existing retail warehouse units in this area. It is therefore proposed that:
- The Bridge of Don Retail park is identified as a Commercial Centre.
  - Site OP75 is retained as a site for new bulky goods retail warehouse units.



**Floorspace and Turnover 2013**

| Floorspace and Turnov | No.       | Convenience |             |                 | General Comparison |             |                 | Bulky Goods  |              |                 | All Goods    |              |                 |
|-----------------------|-----------|-------------|-------------|-----------------|--------------------|-------------|-----------------|--------------|--------------|-----------------|--------------|--------------|-----------------|
|                       |           | GFA Sq M    | NFA Sq M    | Turnover £/Sq M | GFA Sq M           | NFA Sq M    | Turnover £/Sq M | GFA Sq M     | NFA Sq M     | Turnover £/Sq M | GFA Sq M     | NFA Sq M     | Turnover £/Sq M |
| Retail Goods Shops    | 10        | 1801        | 1208        | 10.41           | 1910               | 1432        | 6.19            | 19336        | 14502        | 27.75           | 23047        | 17142        | 44.35           |
| Retail Services       | 1         |             |             |                 |                    |             |                 |              |              |                 | 168          |              |                 |
| Vacant                | 0         |             |             |                 |                    |             |                 |              |              |                 |              |              |                 |
| <b>Total</b>          | <b>11</b> | <b>1801</b> | <b>1208</b> | <b>£10.41m</b>  | <b>1910</b>        | <b>1432</b> | <b>£6.19m</b>   | <b>19336</b> | <b>14502</b> | <b>£27.75m</b>  | <b>23047</b> | <b>17142</b> | <b>£44.35m</b>  |

| Year | Recent Changes                                     |      |              |        |       | Retail Goods Turnover £m | Vitality and Viability Summary   | Retail Strategy Summary   |                          |
|------|--|------|--------------|--------|-------|--------------------------|--|---|--------------------------|
|      | Conv   | Comp | Ret Services | Vacant | Total |                          |  | Centre Classification   | Planning Policy Approach |
| 2018 | 1  | 4    | 1            | 0      | 6     | £28.59m                  | The Denmore and Bridge of Don RP comprises mostly bulky goods units although the retail park includes both general comparison and convenience shopping. Concepts of vitality and viability are difficulty to apply to this location. | Bridge of Don retail park - Commercial Centre<br>OP75 - opportunity for new Commercial Centre (Bulky Goods) | Protection               |
|      | <i>excludes other retail units in Denmore area</i> |      |              |        |       |                          |  | Proposed Retail Floorspace Commitments  |                          |
|      |  |      |              |        |       |                          |  | Proposals   |                          |

## Garthdee

### Description and Health Check

- 6.28 Garthdee comprises 5 large format retail units – two superstores (Asda and Sainsbury) and three retail warehouse units (Currys, Boots and B&Q). Argos is also located inside the Sainsbury superstore. Its location is shown in Figure 6.3. Garthdee is identified as a Commercial centre in the 2017 LDP.

**Figure 6.3: Garthdee Commercial Centre**



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*Catchment Area*

6.29 The update of the retail model identifies the following characteristics of Garthdee's catchment area and penetration rates within study zones:

- The catchment area for Garthdee is broadly similar for both convenience and comparison goods. The PCA comprises zones within the south west of the City although there is a slight variation between specific categories of goods. The secondary catchment area was identified primarily to the west and south – Zones 19 (Culter and Banchory), 20E and 20W (Newtonhills and Elsick), 31 (Portlethen) and 32 (Cove). This is very similar to that identified in the 2013 Report
- For convenience goods market penetration rates are significantly lower than were identified in the 2013 report – in the region of 20-25% in the PCA and 10-15% in the SCA. Bulky goods had similar penetration rates as convenience goods but general comparison goods' market share was lower (peaking at 13% in the PCA but less than 10% in other areas; and no higher than 10% but this is spread across a wide area).
- In 2004 it was noted that Garthdee's catchment area was very wide and the location had a sub-regional retail function but this function appeared to have declined up to 2012. This reduction in role has continued since 2012 reflecting additional convenience provision, primarily in Aberdeenshire (e.g. Tesco at Banchory).

6.30 The 2013 Report considered the extent to which the changing function of Garthdee was significant for assessing whether or not Garthdee should be identified as a District Centre rather than as a Commercial Centre within the network of centres. Although market share within the primary catchment areas was similar to that identified for convenience goods for other locations such as Dyce and Danestone it considered that, because the overall area served by the location remains very wide that, for the time being, it was not appropriate to identify Garthdee as a District Centre similar to other locations in Aberdeen. It noted that this situation could change in the future once the centres for the new urban areas in Aberdeen and the new town centre for Elsick become established.

6.31 In the current study the principle changes appear to be that, although the catchment area remains relatively wide the market penetration rates have declined. In other words, there has been no strengthening of the relationship between the retail units at Garthdee and surrounding residential areas. This, combined with the fact that the centre offers very limited retail and non-retail services would indicate that Garthdee does not have characteristics that would support its designation as a District Centre and it should, therefore, remain designated as a Commercial Centre.

*Retail Offer*

6.32 Table 6.3 summarises the retail provision within Garthdee since 2004.

**Table 6.3: Garthdee – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2004 | 2            | 3    | 0            | 0      | 5     | £166.79m     |
| 2012 | 2            | 3    | 0            | 0      | 5     | £156.34m     |
| 2018 | 2            | 3    | 0            | 0      | 5     | £138.53m     |

6.33 The Table shows that there has not been any major change between 2012 and 2018 in terms of operators but there has been a significant reduction in turnover – reflecting increased competition from new retail floorspace (particularly convenience floorspace). There have been no significant development or planning consents affecting Garthdee since 2013.

*Additional Services and Facilities*

6.34 The only additional facility within the Commercial Centre is the dry ski-slope.

*Indicators of Vitality and Viability*

6.35 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 Garthdee 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 plus the leisure facility at the ski-slope. There
- *Shopper/household survey information:* In 2013 the Report noted that there were good to very good levels of satisfaction for food shopping and average satisfaction for comparison goods. There were also 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 no independents.
- *Pedestrian flows:* no information is available on pedestrian flows.
- *Vacancy rates:* In 2018 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.

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*Summary*

- 6.36 The character and function of Garthdee has not changed since 2013 – as a result it is considered that Garthdee continues to operate as a Commercial Centre and not as a District Centre.

**Prospects and Key Issues**

- 6.37 Garthdee is relatively close to major new housing at Countesswells, Deeside and Loirston. Although these developments include some additional retail floorspace it is anticipated that Garthdee will benefit from increased expenditure and turnover. This will not be sufficient to return Garthdee to the levels of turnover identified in 2004 and 2013 but will reverse the decline seen since 2013.

- 6.38 The principal issues for Garthdee are:

- Significant market growth with more limited competition resulting in some increases in turnover for convenience and comparison goods.
- General reduction in market penetration rates for Garthdee within its catchment area which remains very wide. Garthdee does not, and is not expected to, develop any significant relationship with nearby residential areas that would support its redesignation as a District Centre.
- The limited retail offer within Garthdee and limited range of non-retail services within the centre.

**Proposed Retail Strategy**

- 6.39 The recommended Retail Strategy proposes:

- Identification of Garthdee as a **Commercial Centre** in the retail network.



## Kittybrewster

6.40 The Kittybrewster Retail Park is located 1.5kms north west of the City Centre close to Berryden District Centre. The retail park comprises a range of general comparison and bulky goods retail units with one drive-thru restaurant and a gym. In total the retail park has 10 retail warehouse units. Its location is shown in Figure 6.4.

**Figure 6.4: Kittybrewster Retail Park**



### *Catchment Area*

6.41 The update of the retail model identifies the following characteristics of Kittybrewster’s catchment area and penetration rates within study zones:

- The catchment area served by Kittybrewster is primarily located within the city of Aberdeen. Although there are slight differences between bulky and general comparison goods the primary and secondary catchment areas are effectively the whole of the City. Despite being 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.

6.42 Since 2013 there has been a steady shift from bulky comparison to general comparison goods with the result that now the floorspace within the retail park is evenly split between these categories but two thirds of the turnover of the retail park is for general comparison goods. In addition, there has been the loss of one furniture and one electrical (white goods) retailer which have been replaced by a gym and drive-thru restaurant. The remaining 10 retailers include 3 general comparison and 7 bulky goods retailers.

#### *Retail Offer*

6.43 Table 6.4 summarises the retail provision within the Boulevard RP since 2004.

**Table 6.4: Kittybrewster Retail Park – Results of Retail Surveys**

| Year | No. of Units |      |              |        |       | Retail Goods |
|------|--------------|------|--------------|--------|-------|--------------|
|      | Conv         | Comp | Ret Services | Vacant | Total | Turnover £m  |
| 2004 | 0            | 12   | 0            | 0      | 12    | £28.53m      |
| 2012 | 0            | 12   | 0            | 1      | 13    | £26.05m      |
| 2018 | 0            | 10   | 1            | 0      | 11    | £46.72m      |

6.44 The reduction in units between 2012 and 2018 reflects the development of the gym and drive-thru restaurant. Despite this loss of floorspace the greater proportion of general comparison has resulted in a significant increase in overall turnover within the retail park.

#### *Additional Services and Facilities*

6.45 The retail park includes a commercial gym (Pure Gym).

#### *Indicators of Vitality and Viability*

6.46 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 10 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 is one restaurant and a commercial gym on site with no other additional services.
- *Shopper/household survey information:* Not available
- *Types of retail operator:* retailing in the centre/retail park is dominated by national multiples with no independents.
- *Pedestrian flows:* no information is available on pedestrian flows.

- *Vacancy rates:* In 2018 there were no vacant units. 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.

#### Summary

6.47 The character and function of Kittybrewster Retail Park is as a successful Commercial Centre.

#### Prospects and Key Issues

6.48 Kittybrewster RP has an extensive catchment area for both bulky and general comparison goods. Within this area there will be both significant population and expenditure growth which will support further turnover growth. However, there is limited opportunity for the retail park to expend and so any increases in floorspace will be associated with increases in mezzanine space within individual units. Although there has been increased floorspace at Bridge of Don RP this does not appear to have affected Kittybrewster RP. The retail park has also been fortunate in that it has not suffered from national retailer closures in the same way that Lower Berryden has been.

6.49 In overall terms it is expected that the retail park will benefit from further growth and there will be pressure for additional non-bulky retail floorspace within the retail park.

6.50 The principal issues for Kittybrewster RP are:

- Increased available expenditure for comparison goods leading to turnover growth although this will be less than identified between 2013 and 2018.
- The pressure for further shift from bulky to general comparison and, potentially, for new convenience floorspace within units.
- Limited opportunities within the retail park for future growth.
- The lack of range of retail offer and other services within the retail park.

#### Review of Retail Strategy

6.51 Kittybrewster Retail Park is a purpose-built retail park located to the north of the City Centre. Turnover has increased significantly between 2013 and 2018 reflecting increases in general comparison floorspace. The retail park has good indicators of viability but it does not provide additional facilities and services apart from a gym and therefore does have limited vitality. Further growth in turnover is anticipated.

6.52 The recommended Retail Strategy proposes:

- Continued identification of Kittybrewster Retail Park as a **Commercial Centre** within the retail network.

