

Aberdeen City and Aberdeenshire Retail Study – 2018/19 Update

This Update follows the structure of the 2013 Study. The report is provided in three volumes:

Volume 1 generally concentrates on retail policy. It sets out an overview of the study – the approach and method and the key findings of the study including: an analysis of retail trends; a description of current retail provision in the study area; analysis of changes since 2004 and 2013; future demand and supply; and a recommended strategy for development planning for retail, retail services and leisure within the study area.

Volume 2 generally concerns retail locations and sites. It provides a review of current and future provision for the principal retail locations within Aberdeen City. Volume 3 sets out the appendices for the study.

Retail Deficiencies (Convenience)

The only occurrence when it could be considered that Aberdeen as a whole has any quantitative deficiency for convenience goods is in the high growth scenario in 2032 – at all other times the existing/committed convenience floorspace trading at notional sales densities exceeds forecast available expenditure.

In summary this analysis suggests that, as a whole, the City does not have any significant quantitative deficiencies for convenience floorspace to 2032. However, there are variations between different parts of the city with the North/North West and City Centre with significant “excess” of existing convenience floorspace, whereas the South and West of the City are broadly in balance. Within the Central North part of the City (Zones 26, 27 and 28) there is a significant deficiency in all scenario tests.

Additional convenience floorspace should be provided in the major expansion areas identified in the LDP. These should form the focus of new District or Neighbourhood Centres providing a range of services and facilities to these new communities.

In the South there is a lack of convenience provision serving the Cove and Loirston area. Site OP59 addresses this deficiency. In the West there is limited choice in terms of types of convenience floorspace. This can be addressed through the provision of limited new convenience floorspace as part of the major expansion areas.

Retail Deficiencies (Comparison and Bulky Goods)

In overall terms it is not considered that there are significant existing quantitative or qualitative retail deficiencies for either general comparison or bulky comparison goods within the City. Although significant deficiencies are identified for the City Centre for general comparison goods from 2027 onwards it is concluded that the uncertainties regarding these forecasts, the need to protect and promote the existing City Centre and supporting existing proposals for enhancing the City Centre’s retail offer, lead to the conclusion that additional new general comparison floorspace should not be identified outwith the City Centre.

For bulky comparison goods deficiencies are identified for the remainder of the City (outwith the City Centre) from 2022 onwards. Site OP75 at Denmore Road, Bridge of Don has the potential to assist in addressing these deficiencies should this result in demand for additional bulky goods floorspace.

Addressing Retail Deficiencies

Volume 1 of the Retail Study makes detailed recommendations on how to address retail deficiencies in tables 5.8 and 5.9 referring to existing opportunity sites in the LDP. Generally the recommendations support the continued identification of existing sites are no major changes are proposed.

Policy Framework

The proposed policy framework looks to continue our current approach of supporting Aberdeen City Centre and the existing network of centres, and catering for the needs of major expansion areas. Specific findings are summarised below.

Aberdeen City Centre

- Boundary of City Centre. Limited amendments to the boundary of the City Centre are recommended and shown in Figure 2.13 in Volume 2 of the Report. In particular this excludes the King Street area which is recommended to be identified as a Neighbourhood Centre (subject to future review) and inclusion of part of Rosemount Viaduct/Skene Street (south side) within City Centre.
- Identification of the City Centre Retail Core. This continues the same area identified in the 2017 LDP – also shown in Figure 2.13 of Volume 2 of the Report.
- In areas outwith the City Centre Retail Core there should be encouragement of mixed commercial and residential uses as well as retail and retail services.
- Other initiatives aimed at supporting the vitality and viability of the City Centre including pedestrianisation of Union Street in the Retail Core, environmental improvements and transport infrastructure improvements should be supported. This includes the following proposals recommended in the City Centre Masterplan: EC08; CM02; CM04; EN02; EN05; EN06; EN07; EN04; IN01; IN06 – subject to the comments set out in Table 2.12 in Volume 2 of the Report.

Other Locations

- Encouragement of diversification of uses (to include food, drink, entertainment and leisure) in both Rosemount and Torry town centres to support diversity and vitality of these centres.
- Inclusion of Lower Berryden within an enlarged Berryden District Centre (see review of Upper Berryden in Volume 2 of this Report).
- Inclusion of Haudegain as a neighbourhood centre in the network/hierarchy of centres (see review of Haudegain in Volume 2 of this Report).

- Inclusion of Bridge of Don Retail Park as a commercial centre in the network/hierarchy of centres (see review of Denmore/Bridge of Don in Volume 2 of this Report).
- Identification of future new District Centres as a focus for expansion areas at Grandhome, Rowett South and Loirston.
- Identification of future new Neighbourhood Centres as a focus for expansion areas at Countesswells, Greenfearns and Milltimber.

Union Street

This Update has identified that 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.

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.

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 Supplementary Guidance 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 Supplementary Guidance 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.

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.