Aberdeen City & Aberdeenshire Councils

Retail Capacity, Turnover and Opportunity in Aberdeen City/Aberdeenshire

Final Report
Volume 2: Review of Centres

June 2024

GRAVIS
PLANNING
Hargest Planning Ltd

Aberdeen City & Aberdeenshire Councils

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1. Introduction

1.1. This Volume sets out information on each of the principal centres identified within the existing retail network. 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.

1.2. Centres included are as follows:

Aberdeen City Council – Sections 2 and 3:

- City Centre
- Town Centres – Rosemount and Torry.
- District Centres – Danestone, Dyce, Berryden, Middleton Park and Rousay Drive.
- Neighbourhood Centres have *not* been included in this review. The Aberdeen Planning Guidance – Hierarchy of Centres identifies 32 separate neighbourhood centres.
- Commercial Centres – Garthdee, Kittybrewster, Links Road/Boulevard, Bridge of Don and the Denmore Road area. Lower Berryden is included within the review of Berryden.

Aberdeenshire Council

- Principal Town Centres – Banchory; Banff; Blackdog – *not included;* Ellon; Fraserburgh; Huntly; Inverurie; Peterhead; Stonehaven; Turriff
- Other Town centres – limited to Westhill and Portlethen – these have been included because of their particular characteristics which are distinct in terms of numbers of units and/or turnover when compared to the remaining Other Town Centres in Aberdeenshire
- Commercial Centre – summary comments only

2. Aberdeen City Centre

Introduction

2.1. Aberdeen City Centre remains the principal retail location in the north east of Scotland. Although it remains the pre-eminent retail location its turnover has declined since 2018. Since that date there has been the loss of major retail floorspace, notably the John Lewis department store, and Inverurie in particular has grown. Nonetheless, the City Centre still has more than six times the total floorspace (retail and services) and close to four times the retail turnover of Inverurie.

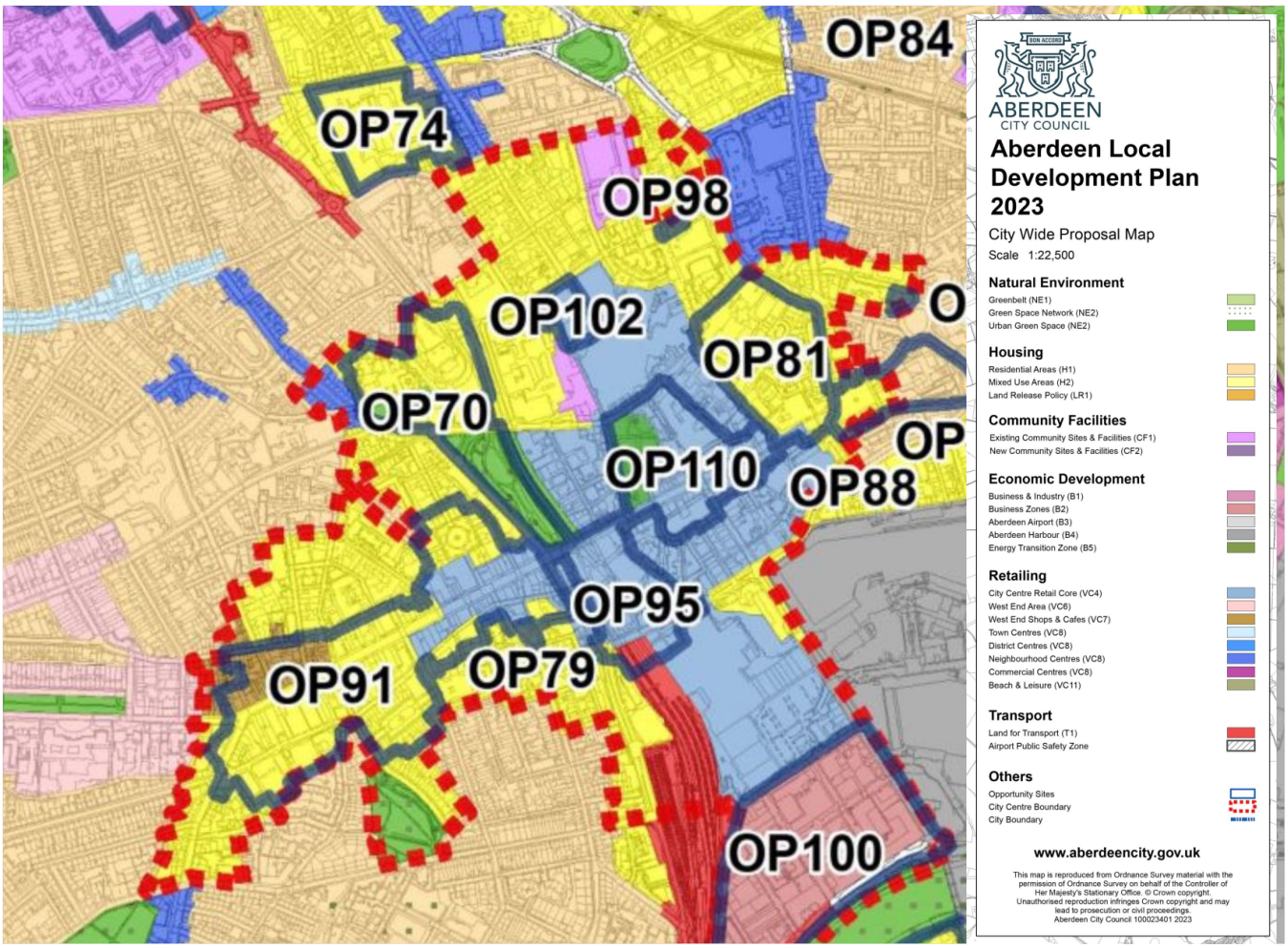
2.2. Both the dominance and regional role of the City Centre is reflected in the results of the household survey and this confirms that the catchment area of the city centre extends over the whole of the study area although, reflecting the reduction in floorspace and turnover, the level of market share/penetration achieved by the City Centre has reduced, especially for general comparison goods, since the previous survey in 2012. Significant trade to the City Centre also originates from other authority areas, particularly from Angus, Moray and Shetland.

2.3. The 2023 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 VC4)
- Mixed Use Areas (Policy H2)
- West End Shops & Cafes (Policy VC7)

2.4. 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. The Morrisons/King Street area, which was previously included in the City Centre is now outwith the City Centre boundary and allocated as a Neighbourhood Centre. The removal of this area from the City centre will result in a reduction in floorspace and turnover from the City Centre even though these uses and turnover remain. Figure 2.1 provides an extract of the City Centre detail from the 2023 LDP Proposals Map.

Figure 2.1: Aberdeen City LDP 2023 – City Centre Extract



Description of Land Uses within the City Centre

2.5. There is a wide diversity of uses located within the defined City Centre. These have not significantly changed from those identified in 2018. 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); and
- other uses including: offices; hotels; and open space.

2.6. The focus of this review is on retail, retail services, sports, leisure and entertainment uses. 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.

Floorspace and Numbers of Units

2.7. Figure 2.2 sets out the overall scale of floorspace by type of use within the defined City Centre and identifies changes since the previous retail study update in 2018. It should be noted that this takes into account the effect of removing Morrisons/King Street from the City Centre as defined in the LDP.

Figure 2.2: 2023 Retail and Retail Service Floorspace – Aberdeen City Centre

	No. of Units			Gross Floorspace (Sq M)			Change 2013-2023		Change 2018-2023	
Use/Activity Type	2013	2018	2023	2013	2018	2023	Units	Floorspace	Units	Floorspace
Retail - Convenience	74	68	114	23522	33,056	47,033	+54%	+41%	+68%	+42%
Retail – General Comparison	397	310	263	156429	154,005	114658	-34%	-27%	-19%	-26%
Retail – Bulky Goods		15		20833	14,966	11267		-46%		-25%
Retail Services	308	436	503	57215	100,458	93729	+63%	+64%	+15%	-7%
Vacant	65	83	111	13847	27,543	55300	+71%	+299%	+34%	+101%
Total	**844**	**912**	**991**	**271,846**	**330,028**	**321,987**	**+17%**	**+18%**	**+9%**	**-2%**

2.8. In total 377 retail goods shops were identified from Regional Assessor data and survey in December 2023 – this is only one less than identified in November 2018. The types of operator were quite diverse but a relatively high proportion were identified to be national or regional multiple operators – 139 retail goods shops (only) were multiples i.e. 37% of the total. This is a lower proportion than identified in the 2018 survey.

2.9. Figure 2.2 includes the surveys undertaken in both 2013 and 2018 and identifies the changes that have occurred over this 10 year period. This shows that there have been major changes in the retail goods and services offer within the City Centre:

- Convenience retail provision has increased significantly, especially in the past 5 years both in terms of numbers of units and floorspace. This takes into account that Morrisons is no longer located within the defined City Centre. Convenience floorspace now accounts for almost 15% of the total floorspace of the City Centre (excluding non-retail/retail services uses).
- Comparison goods floorspace is dominated by general comparison. This has declined both steadily and significantly over the past 10 years. In 2013 397 units were identified, in 2018 this was 325 units and current 263 units have been identified – a reduction of 30%. A similar level of reduction has been identified for floorspace – which has declined by 43,000 sq m GFA since 2018 and 51,000 sq m GFA since 2013. This is in part explained by the closure of John Lewis (16,000 sq m GFA) in 2022 and Debenhams in 2021 (8980 sq m).
- The total number of retail service uses has grown significantly from just over 300 units in 2013 to over 500 in 2023. However, this growth has not been matched by increases in floorspace between 2018 and 2023. Retail services account for close to 30% of the total floorspace within the City Centre.
- Vacancies have increased, especially since 2018. In December 2023 11% of all units were identified as vacant – this figure is actually slightly less than the UK national average (at 13%) but in terms of floorspace 17% is vacant in the City Centre. The closure of the John Lewis department store in 2022 accounts for the majority (58%) of the increase in vacant floorspace.
- The overall reduction in floorspace in the City Centre since 2018 is accounted for by the demolition of the market building and also occupation of previous retail/service floorspace by non-retail/service uses (e.g. the NHS facility located in Bon Accord).

Retail Turnover

2.10. Reflecting the reduction in overall retail floorspace there has also been a reduction in turnover. Data from earlier retail studies identifies turnover since 2004. Expressed in 2021 prices turnover of the City Centre is identified as follows:

- 2004: £691.89m
- 2013: £881.22m
- 2018: £891.22m
- 2023: £692.69m

2.11. It should be noted that the 2018 study estimate was based on the 2013 household surveys extrapolated to 2018 and therefore less weight can be attributed to this figure (the 2013 expenditure forecasts significantly overestimated expenditure growth to 2018). Nonetheless the reduction in turnover since 2013 is substantial. The removal of Morrisons and King Street area from defined City Centre and the closure of John Lewis & Debenhams account for much of this reduction (in total about £130m) but, even allowing for these, this still indicates that turnover has reduced by a further £70m or 9% since 2018. Another key factor has been over this period, notwithstanding long term forecasts of expenditure growth, there has been a *reduction* in expenditure (net of SFT) supporting turnover in shops. On a per capita basis this reduction has

been -9% for all goods and -12% for comparison goods and reflects a combination of the hiatus during the pandemic, uplift in internet sales and the adverse economic impacts associated with global events since 2021 (see Vol 1 Section 3). These three factors i.e. closure of major retail units, removal of King Street from the City Centre, and reduction in expenditure through shops account for the total reduction in turnover within the City Centre. What has not been seen to date is any strong trend towards market concentration within the City Centre for comparison goods that might be expected from current market trends that would counter these adverse factors.

Retail Goods Shops

Overview

2.12. 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 (including 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. Compared to previous years the closure of John Lewis and increased weakness of Bon Accord (which is commented upon below) has increased the dominance of Union Square at the southern end of this axis. Recent announcements about the closure of M&S at St Nicholas will reinforce this trend to the southern end of the axis.

2.13. 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 Gillies just beyond 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 with the Gillies store located 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. This area is, however, clearly separated from the City Centre by the A956 West North Street dual carriageway.

2.14. 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, and Trinity. The Academy is no longer open as an internal mall and the Galleria, although enclosed, is small and only contains service uses.
- 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 has been demolished. Consent is granted for the redevelopment of the site which includes proposals for the reinstatement of the market.

2.15. As noted in the 2013 and 2018 ACARS Reports the retail units in the City Centre continue to 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 over 50 categories of retail goods shops, almost 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. There are, however, no longer any department stores within the City Centre with three (John Lewis, Debenhams and Esslemont and Mackintosh) all closing in the period 2007-2022 (in

addition BhS, another major comparison goods store, also closed in 2016). The closure of Debenhams and E&M reflect the steady decline in this sector (which has, in recent years, been especially susceptible to competition from internet sales) and, in the case of John Lewis it was reported that a key factor for its closure was the cost associated with logistics reflecting the fact that the next nearest JL store is located more than 100 miles to the south. Although this is an important factor that would increase the cost of the operating this particular store it is very likely that increased pressures on the viability of department stores' business models will also have been a critical factor that underpinned the need to close this particular shop.

2.16. The dominance of the retail core for retail goods shops is also seen in the distribution of national/regional retailers shown in Figure 2.7. 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 supermarkets (e.g. Sainsbury and the Co-op) and CTN[1] operators (e.g. RS McColl).

Retail Malls/Shopping Centres

Union Square

2.17. Union Square opened in October 2009, it was developed by Hammerson plc who announced in Feb 2024 that centre has been sold to an affiliate of Lone Star Real Estate Fund VI (for £111m) and remains in that company's ownership. In total it provides 51,000 sq m GFA of retail and leisure floorspace (including circulation space) and has 2300 parking spaces available on-site. The total occupied retail goods floorspace within Union Square (excluding small stalls located within the malls) is, according to Regional Assessor data, 28,169 sq m GFA that is 16% of the total occupied retail goods floorspace of the City Centre. In December 2023 three units were advertised as vacant which are smaller units in the central part of the mall totalling 873 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.

2.18. 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 Figure 2.4 sets out the floorspace identified by the agents for the development.

[1] Confectioners, Tobacconists and Newsagents

Figure 2.3: Union Square Units and Floorspace

Use/Activity Type	No. of Units	Gross Floorspace (Sq M)
Retail - Convenience	2	442
Retail – General Comparison	39	25,377
Retail – Bulky Goods	4	2350
Food & Drink	28	8,549
Other Ret Services	1	209
Cinema	1	4,235
Hotel	1	8,056
Vacant	3	873
Total	**79**	**50,091**

2.19. 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. This application has not progressed and there is no indication whether or not the new owners of Union square will seek to extend the retail offer in the development.

2.20. M&S has recently confirmed that it will be closing its existing GM store in St Nicholas and expanding its unit in Union Square. The store will increase its footprint to include TK Maxx increasing its footprint from 2478 sq m GFA to 4710 sq m GFA. However, its St Nicholas store is 10318 sq m so this represents a more than halving of the gross floor area of this operator. The TK Maxx store is to relocate taking the Dreams and HomeSense units (the latter being a separate TK Maxx brand) but the future of dreams is not known.

Bon Accord/St Nicholas/former John Lewis

2.21. The Bon Accord/St Nicholas Centre, was sold to EP properties in 2023. EP Properties also acquired the adjacent John Lewis building in 2023 and now own a significant proportion of the Bon Accord/John Lewis/George Street area in the northern part of the city centre (this includes units on the west side of George Street) . It is not clear at the present time what the intentions are for this area but the fact that much of this area is in a single ownership with the owners having experience in complex developments could mean that there will be proposals for the redevelopment for part of this area in the near future.

2.22. Bon Accord/St Nicholas opened in April 1990 and included a first-floor link into the former 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 significant proportion of total floorspace for the retail of fashion clothing and footwear. However, unlike Union Square, Bon Accord has significant vacant units (dominated by John Lewis) and part of the upper floor is leased

to the NHS as a vaccination centre, i.e. no longer in retail use. An indication of the demise of Bon Accord is seen in the valuations of the properties – the P&J reports that, at its peak the Bon Accord was valued at over £200m whereas it was sold for less than £10m and the John Lewis site was reported to be sold at only £0.27m.

2.23. Figure 2.4 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.

Figure 2.4: Bon Accord/St Nicholas Units plus former John Lewis & Floorspace

Use/Activity Type	No. of Units	Gross Floorspace (Sq M)
Retail - Convenience	3	651
Retail – General Comparison	35	22,452
Retail – Bulky Goods	1	231
Ret Services	9	1,822
Vacant	21	22,167
Total	**69**	**47,322**

NB 1800 sq m GFA in non-retail use

2.24. The principal changes since 2018 have been:

- Reduction in comparison goods units from 47 to 36 units and halving of floorspace from 47k sq m GFA to 23k sq m GFA. The announced closure of M&S will also result in a further substantial reduction in floorspace. M&S will expand their unit at Union Square occupying the adjacent TK Maxx unit with the latter relocating to the Dreams & HomeSense units in the retail park section of Union Square.
- Slight increase in service units (from 7 to 9)
- Large increase in vacancies – from 6 units in 2018 to 21 in 2023 (from 1800sq m GFA to over 22,000 sq m GFA). In addition approximately 1800 sq m GFA is now not in retail/retail service use.

2.25. The previous owners for Bon Accord had submitted planning applications for significant redevelopment of Bon Accord. However, these proposals have not been implemented and are now lapsed. As noted above, the new owners control a substantial area of the northern part of the City Centre and it is likely that they will be preparing proposals for at least part of this area.

Trinity

2.26. The Trinity Centre is the oldest of the principal shopping centres in the City Centre and opened for trading in 1984 – just before the St Nicholas Centre in 1985. As with each of the other shopping centres this was also sold in 2023, in this case to Robert Keane, who is also owner of properties in Shiprow. Whereas the centre has experienced major closures prior to 2018 as well as the loss of Debenhams in 2021, there have been limited other closures in recent years. Figure 2.5 summarises the units within the centre.

2.27. The principal changes since 2018 are:

- Reduction in general comparison - no change in numbers of units but reduction from 13,300 sq m GFA to 5900 sq m GFA (reflecting closure of Debenhams)
- Increase in vacancies (from 5 to 6) but. More significantly in floorspace terms reflecting the closure of Debenhams.

Figure 2.5: Trinity Centre (source: Regional Assessor and Survey Dec 2023)

Use/Activity Type	No. of Units	Gross Floorspace (Sq M)
Retail – Convenience	1	172
Retail – General Comparison	14	5,927
Food & Drink	5	660
Vacant	5	10,979
Total	**25**	**17,738**

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

Academy and Galleria

2.29. Both the Academy and Galleria were included as specific shopping centres in previous studies. However, in 2023/4 both of these make only a limited contribution to the retail offer within the City Centre:

- The Academy Centre is located adjacent to Belmont Street and Schoolhill. The Academy Centre has now closed public access to the enclosed part of the centre. This has only a limited impact because units on the periphery and within the courtyard area are accessible. The Academy is dominated by retail and leisure surveys (cafes, restaurants and bars) and provides minimal floorspace for the sale of retail goods.
- The Galleria opened in 1998 and now only comprises retail and leisure service units.

2.30. Figure 2.6 sets out a breakdown of type of use for the principal shopping malls of the City Centre showing how these have changed since 2012.

Figure 2.6: Summary of Changes in City Centre Shopping Malls

		Convenience	General Comparison	Bulky Goods	Retail Services	Vacancies	Total
Union Square	2012	3	47	1	26	6	83
	2018	2	46	1	30	1	80
	2023	2	39	4	28	3	77
	Change 2012-23	-1	-8	+3	+2	-3	-6
	Change 2018-23	-	-7	+3	-2	+2	-3
Bon Accord/St Nicholas	2012	2	49	0	13	3	67
	2018	2	47	0	7	6	71
	2023	3	35	1	9	21	69
	Change 2012-23	+1	-14	+1	-4	+18	+2
	Change 2018-23	+1	-12	+1	+2	+15	-2
Trinity	2012	2	17		1	3	23
	2018	2	14		3	6	25
	2023	1	14		5	5	25
	Change 2012-23	-1	-3		+4	+3	+2
	Change 2018-23	-1	-		+2	-1	-
Academy	2012		4		2	3	9
	2018		3		3	2	8
	2023				7	2	9
	Change 2012-23		-4		+5	-1	-1
	Change 2018-23		-3		+4	-1	-

Other Areas: Union Street

2.31. 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 multiple 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. Changes since 2018 in units along Union Street are significantly less than have occurred at Bon Accord. The anticipated closure of the St Nicholas M&S, although located as part of the shopping centre, is in a prominent location at the heart of the Union Street/Bon Accord-Market Street access and will have a significant adverse impact on Union Street. The closure of M&S reflects the fact that the company operates two "general merchandising" stores within the City Centre and has decided to rationalise this into a single store with the preference being the unit in Union Square.

2.32. Notwithstanding the impact of this future closure important retail units are still located on Union Street which generate significant pedestrian footfall – notably Primark within the Trinity Centre. The former BhS unit has been vacant for a significant period of time and the unit is due to be demolished shortly and its redevelopment is linked to Aberdeen market development.

2.33. As noted in the 2018 study, 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

2.34. The West End is focussed on Union Street which was described above. Notable developments in the past 5-10 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.

2.35. 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 VC7) in the current LDP.

Primary and Other Retail Frontages

2.36. Figure 2.8 draws on information from the survey to identify the principal retail frontages within the City Centre. These frontages are similar to those identified in 2018.

Figure 2.7: Location of Multiples (Goods retail only) – Aberdeen City Centre

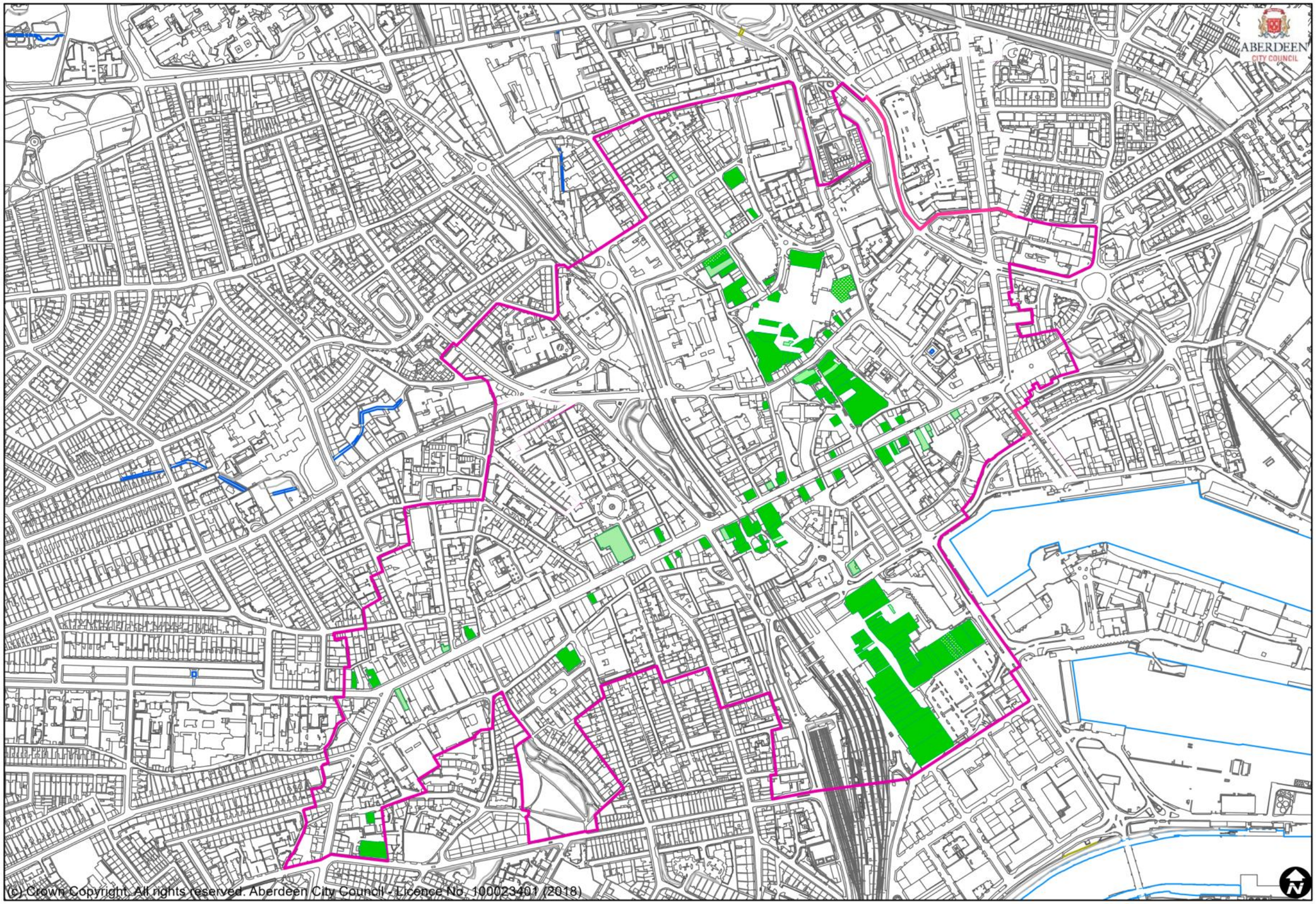
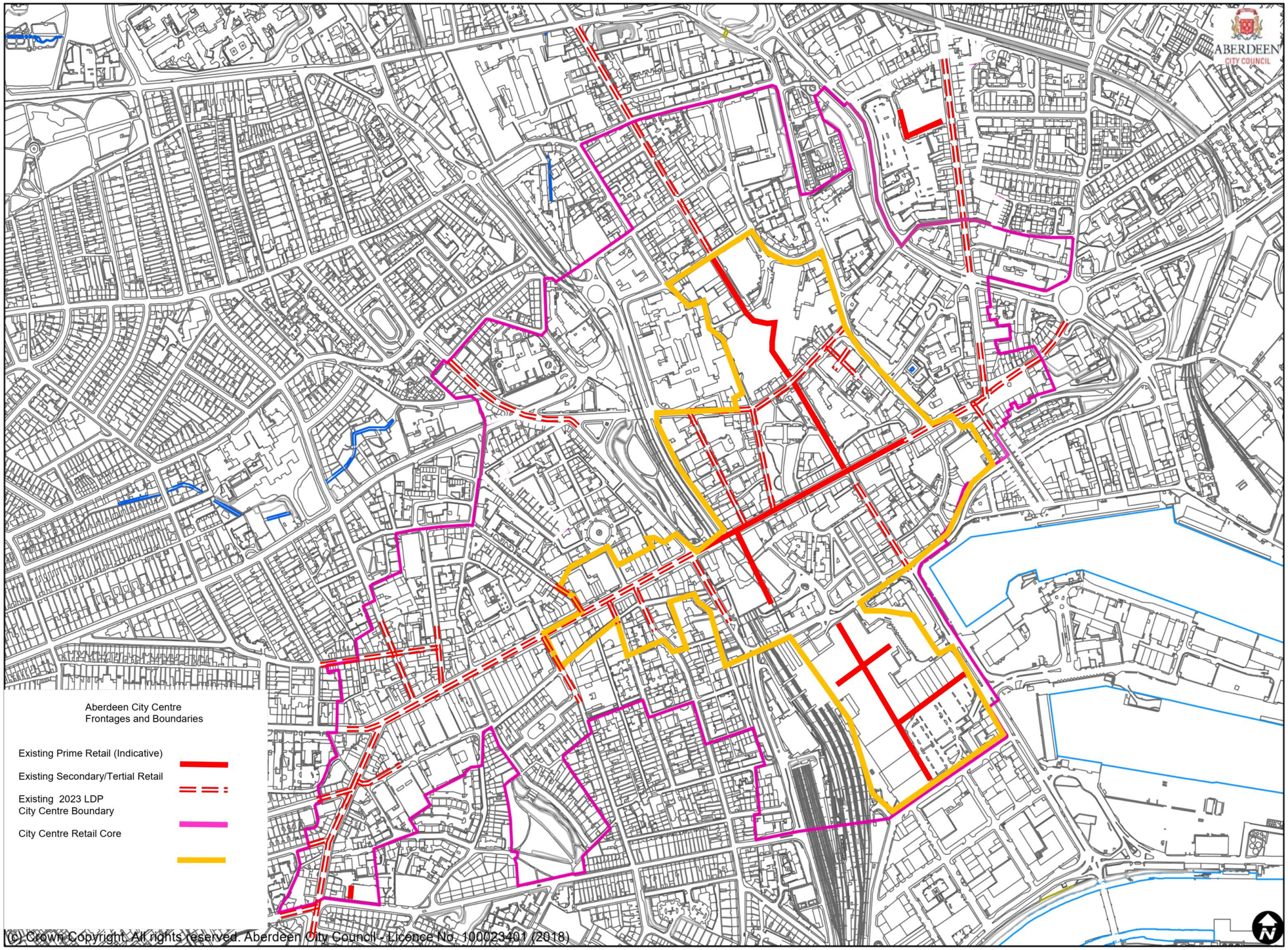


Figure 2.8: Aberdeen City Centre frontages and City Centre Boundaries (2023 LDP)



Retail Services and Commercial Leisure Uses

2.37. Services uses included in the survey of units within the City Centre (and in all other centres assessed in the study) have adopted the definitions used by Experian Goad in their surveys. These identify three categories of commercial services:

- Retail services – including health & beauty; photo processing, repairs and alterations, travel agents and similar.
- Leisure services – bars, restaurants, cafes, fast food & takeaway, sports and leisure facilities.
- Financial and business services – banks, building societies, legal services, financial and property services.

2.38. In each of the above the identification of units has reflected the principle of whether the businesses are, primarily, serving members of the public visiting "off the street" i.e. comparable to the difference between the former Use Class 2 and Use Class 4. Compared to the previous Goad classification system used in the 2013 and 2018 studies this results in a slight increase in numbers of service units identified (by approximately 10% more service units).

2.39. Retail, leisure and business service 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 some shops, cafes are included within the footprint of the stores. As identified in 2018 there are 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 – this 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 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 numerous restaurants/fast food and similar at both first and ground floor levels.

Market and Catchment Characteristics

2.40. The update of the retail model identifies that the catchment areas served by the City Centre remain similar to those identified in 2013 and 2018 reflecting the fact that the City Centre is the principal regional centre serving the whole of north east Scotland. However, reflecting the reduced turnover of the City Centre, the market share of the City Centre (i.e. proportion of total expenditure originating in one area spent in the City Centre) has declined slightly.

Comparison Goods

2.41. 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, that 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 many parts of the city and shire – the principal 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.

2.42. 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.

2.43. The extent of catchment areas, market penetration rates and a summary of other key information for the City centre is provided in Figure 2.20.

Convenience Goods

2.44. The primary and secondary catchment areas of convenience shops within the City Centre are generally quite limited. Even though the City Centre non longer includes Morrisons there has been an *increase* in convenience floorspace within the city. This primarily serves local residential populations and those working in the city although it does appear that some trade is linked to those travelling into the City Centre for other purposes. In some of these stores 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).

2.45. Market penetration rates for convenience goods shops are, however, relatively low.

Vitality and Viability Indicators

2.46. 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

2.47. Figure 2.9 (parts A, B & C) set out key information from Promis of their assessment of the City Cntre (report commissioned January 2024). This identifies that current prime Zone A rents for retail are in the region of £1076 per sq m (£100psf). Figure 2.8A shows that this has declined significantly since the advent of the Covid pandemic in 2020 and has not recovered. This is in contrast to Edinburgh and Glasgow where it is reported that rents are returning close to pre-covid levels. Figure 2.9A also compares Aberdeen to other regional centres[2]. This identifies that, even allowing for different Zone A bands, Aberdeen rents are lower than other regional centres.

2.48. Detailed information on prime rents achieved in the different parts of the City Centre are not available – highest rents are achieved in Union Square but, whereas previously best rents achieved in Bon Accord were approximately 10-15% below this, the lack of demand for units and low purchase price for the acquisition of Bon Accord suggests that there is now a greater differential between Union Square and Bon Accord. Along Union Street away from the prime pitch rents decline quite rapidly.

2.49. Prime Zone A rents in Aberdeen remain the third highest for traditional centres in Scotland (after Glasgow and Edinburgh) but rents currently achieved are significantly below those found in the larger cities (which are in the region of £3000 psm prime Zone A). Comparative information is provided in Figure 2.10.

[2] Only limited regard should be had to this because Promis have not recognised that Scotland uses 30' Zone A whereas in England 20' Zone As are used – this means that to be comparable, Scottish Zone A should be increased by ca. 15-20% (depending on the precise characteristics of the property).

2.50. Current prime retail yields have also "softened" significantly to approximately 9% for prime retail in 2021 whereas, pre-covid, they had been reported to be as low as 6.60%[3]. Promis does not identify yields for 2022 and 2023 for Aberdeen. UKReiff reports that the sale of Union Square last month translates to a net initial yield of 11% - whether this reflects a discount because of Hammerson's need to sell or related to the size of the disposal is not known. 11% would indicate a significantly weaker position than Promis identify for other regional centres. Yields in Edinburgh have recently been reported to be half this level.

[3] Low yields are indicative of high value i.e. investors are prepared to accept a lower return for investment because of security of investment and expectation of strong rental growth. Weaker locations therefore have higher yields and strong locations low yields.

Figure 2.9A: Prime Zone A Rents for Aberdeen City Centre

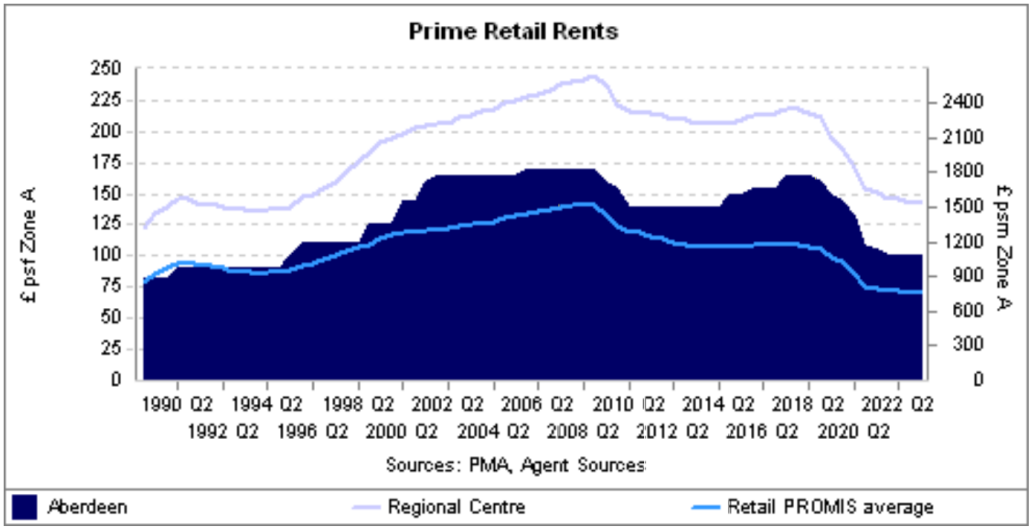


Figure 2.9B: Prime Unit Shop Yields for Aberdeen City Centre

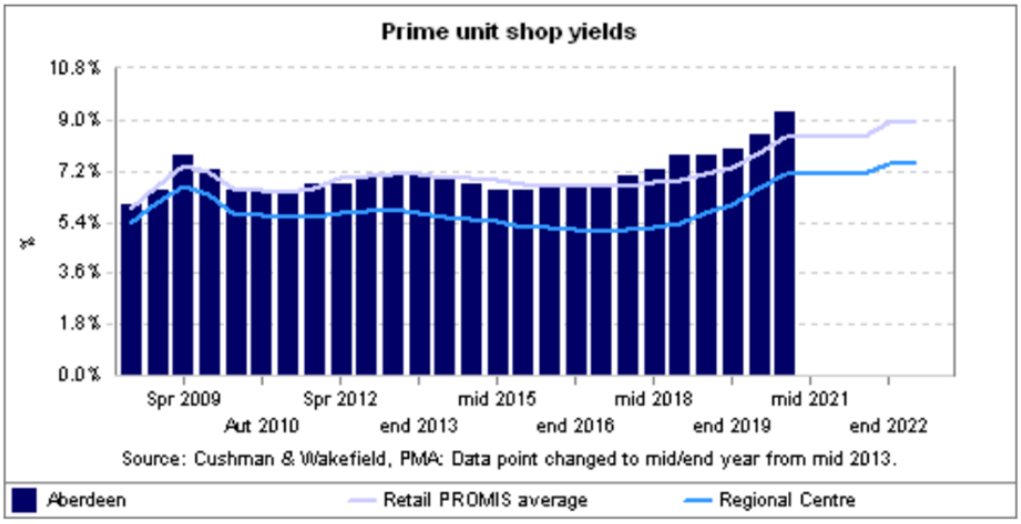


Figure 2.9C: Promis Key Market Indicators for Aberdeen City Centre

Market conditions - key indicators

	Centre	PMA Centre Type Average	Retail PROMIS rank
	Aberdeen	Regional Centre	Rank out of 200, 1=best
Vacant units - prime 2023 Q2 (%)	8.8	14.7	
Vacant units - prime 2022 Q2 (%)	3.0	16.8	
Vacant units - City centre 2023 Q2 (%)	21.6	17.2	136
Vacant units - City centre 2022 Q2 (%)	21.9	17.9	149
Net balance of Take-Up 2022 Q2 - 2023 Q2 (in-movers minus out-movers)(%)	0.7	0.9	81
Prime rents mid 2023 (£psf Zone A)	100	142	39
Change end 2000-end 2008 (%pa)	2.0	2.4	
Change end 2008-end 2012 (%pa)	-4.7	-3.9	56
Change end 2012-end 2017 (%pa)	3.3	0.9	17
Change end 2017-mid 2023 (%pa)	-8.7	-7.5	121
Prime TC Yields mid 2023 (%)	n/a	7.5	
Yield shift mid 2022-mid 2023 (% points)	n/a	n/a	
Yield shift end 2017-mid 2023 (% points)	n/a	n/a	

Sources: PMA, Local Data Company, Local & National agents *Last update: 07/09/2023*

Figure 2.10: Scottish Cities – Key Prime Retail Indicators

	Aberdeen	Dundee	Inverness	Edinburgh	Glasgow
Prime Zone A Rents					
2009	£1,776	£1,184		£2,368	£2,691
2010	£1,453	£969		£1,938	£2,530
2011	£1,453	£969		£1,938	£2,530
2018	£1,776	£915		£2,583	£3,229
2023	£1076	£495	£484		£3,000+
Prime Zone A Yields					
2009	7.30%	8.00%	6.80%		6.80%
2010	6.75%	7.25%	5.50%		4.75%
2011	6.60%	7.00%	5.00%		4.75%
2018	6.60%	7.00%	4.75%		4.00%
2023				5.25%	
Retail Centre Ranking[4]					
2009	20	72	4		1
2010	16	56	5		1
2011	14	43	5		1
2017	11/15[5]		9		2

[4] Venuescore unless stated.
[5] PMA Retail Score 2017

Space in Use in the City Centre

Retail and Service Units

2.51. Information on the numbers of retail and service units and floorspace, together with changes between 2013, 2018 and 2023 were set out in Figure 2.2.

Multiples

2.52. Figure 2.7 identified the distribution of multiples within the City Centre (retail goods units only).

Additional Facilities and Services

2.53. In addition to retail goods shops, retail-, leisure- and business-services the City centre provides a very wide range of civic, community and transport facilities and services. These include:

- Aberdeen Science Centre
- Art Gallery
- Bus Station
- Casinos
- Churches/Places of Worship
- Cinema
- Clinics
- Clubs
- Council HQ
- Concert Hall – Aberdeen Music Hall
- Courts
- Dance Studio
- Dentist
- Employment agencies
- Family History Society
- Funeral Director
- Gym
- Hotels
- Job Centres – Job centre+; Skills Development Scotland
- Library
- Museums/Art centres – Maritime Museum; Arts centre & Theatre; Lemon Tree; Tolbooth Museum
- MSP Office
- Music School
- Newspaper Office
- NHS Health Care Village
- NE Scotland College
- Other Community etc (e.g. Cyreaneans; Credit Unions etc)
- Pubs/Bars
- Railway Station
- Robert Gordon College/University
- Solicitor
- Theatre – Tivoli Theatre; His Majesty's Theatre
- Tourist Information Centre
- Voluntary Service agencies – various including Voluntary Services; Dementia Resources centre; NE Sensory Services

Overall Retail Rankings

2.54. Figure 2.10 noted that, for 2017, Javelin Venuescore ranks Aberdeen City Centre as 11th in the UK and the PMA Retail Score 15th (and also 15th on the PMA Fashion Score, 17th on the PMA Anchor score). 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 12th in 2013 but Experian had previously ranked Aberdeen as 20th in the UK in 2009 and as low as 39th in 2002

2.55. By way of contrast Promis ranks centres nationally against a wide range of indicators relating to retail provision. These are summarised in Figure 2.11.

Figure 2.11: Promis Rankings for Aberdeen City Centre

Retail provision				
	Centre		PMA Centre Type Average	Retail PROMIS Rank
	Aberdeen		Regional Centre	Rank out of 200, 1=best
	000s sqft	000s sqm	000s sqft	
Total Floorspace 2022	2,210	206	1,630	11
No. of managed shopping centres	5		2	
Extent of prime frontage	34		44	
Number of non-food multiples - 2023 Q2	162		147	13
Number of food multiples - 2023 Q2	7		5	19
Number of café / restaurant multiples - 2023 Q2	57		47	15
PMA Town Centre Retail Scores - 2023 Q2				
Total Town Centre score	317		328	25
Non-Food Retail score	233		244	22
Anchor stores score	16		24	40
Fashion score	142		148	20
Other non-food score	75		72	19
Café / Restaurant score	80		80	20
Food stores score	4		5	60
PMA indicator of supply:demand balance (200 PROMIS Centres Average=100)	56		117	184

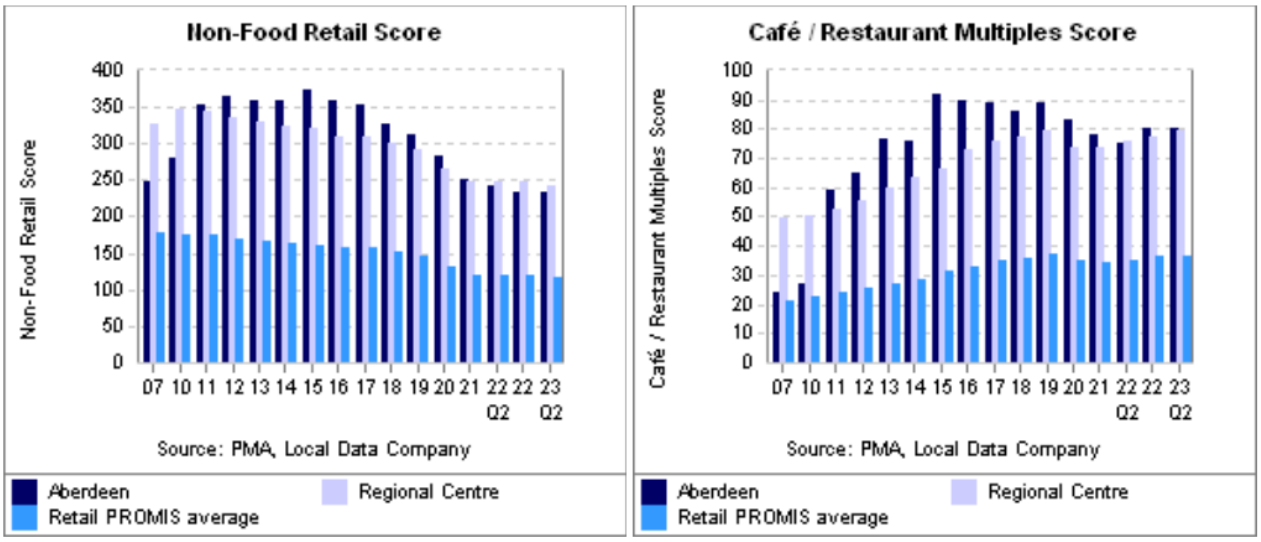
Sources: PMA, Local Data Company *Last update: 07/09/2023*

2.56. Across the full range of Promis rankings Aberdeen's average rank is 24 nationally. The PMA indicator of demand supply is a different measure and, because Promis does not identify the floorspace or market area accurately (compared to the data available for this study) this indicator can be disregarded.

2.57. The ranks in which the centre performs less well include "Food stores score" which, to a substantial degree depends on the boundaries adopted for the centre (i.e. in King Street is included then the ranking would improve significantly). However, the lower ranking for "anchor stores" is more significant. In overall terms, however, these rankings identify Aberdeen as in the range of 11-40th ranked centre in the UK.

2.58. For two indicators – non-food retail score and café/restaurants score Promis identify how these have changed over time. These are set out in Figure 2.12. These suggest that Aberdeen performs close to the average for regional centres at the present time although, up until 2021, the city performed better than average for these types of location.

Figure 2.12: Changes in Promis Non-Food Retail and Café/Restaurants Score- Aberdeen



Occupier Demand and Activity

2.59. At the present time there is relatively limited demand for new occupiers to take space in Aberdeen. However the recent sales of each of Union Square, Bon Accord, John Lewis and Trinity Centres are all indicative that private investors in particular are willing to commit significant sums to invest in the City Centre.

2.60. As with other locations in the UK retail investment and occupier demand is in a state of flux at the current time and it is difficult to draw any long term conclusions regarding the state of the market.

Vacancy Rates

2.61. From Regional Assessor and survey data there were 111 vacant units in December 2023 totalling 55,300 sq m GFA floorspace. This equates to a vacancy rate of 11.2% by number of units and 17.2% by floorspace. Figure 2.14 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 and in Bon Accord/former John Lewis. 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 4% by units and 1.6% by floorspace.
- Bon Accord/St Nicholas/John Lewis – vacancy rates of 30.4% by units and 46.8% by floorspace.
- Trinity – vacancy rates of 20% by units and 61.9% by floorspace.

2.62. Vacancies are now, by area at least, significantly above the national average and vacancies rates have been increasing since 2013. This rate of increase has been faster than has been observed nationally with the result that, whereas in 2018 Aberdeen vacancy rates were below average they are now at/above average.

2.63. Figure 2.13 provides Promis' assessment of vacancy rates. This only considers the core of the city centre and, as a result of this, overestimates actual vacancy rates in the City Centre. However, this does show the pattern of change over time, and that, in recent years Aberdeen has tended to follow the same pattern of change as observed elsewhere. The figure also shows that the closure of John Lewis was the single factor that increased vacancies to above average levels.

Figure 2.13: Changes in Vacancies in Aberdeen City Centre over Time (Promis)

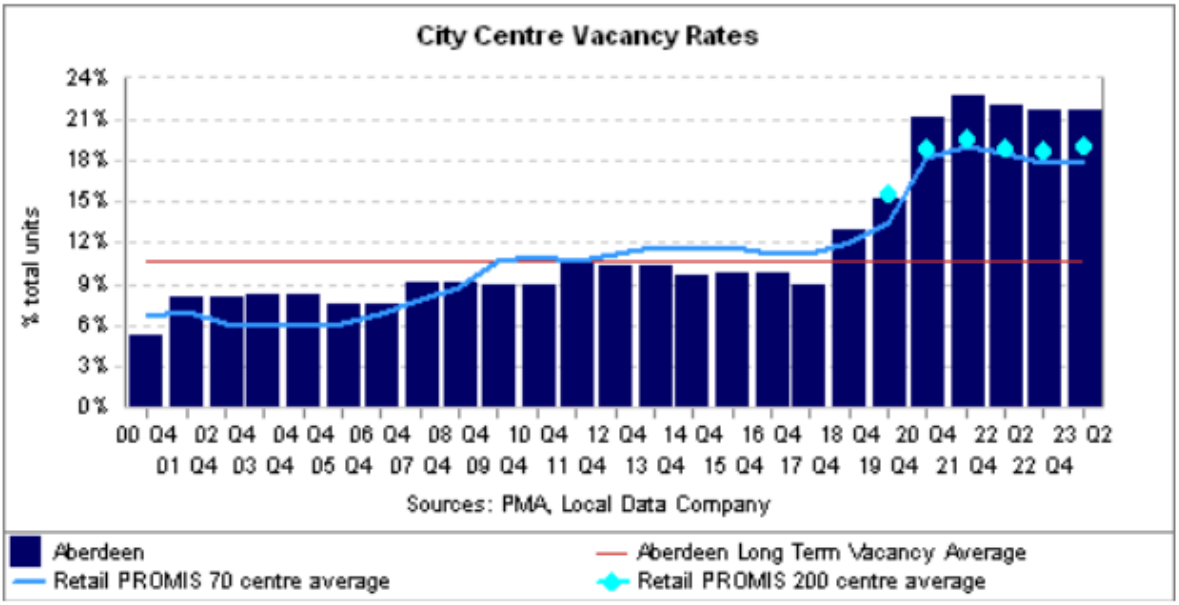
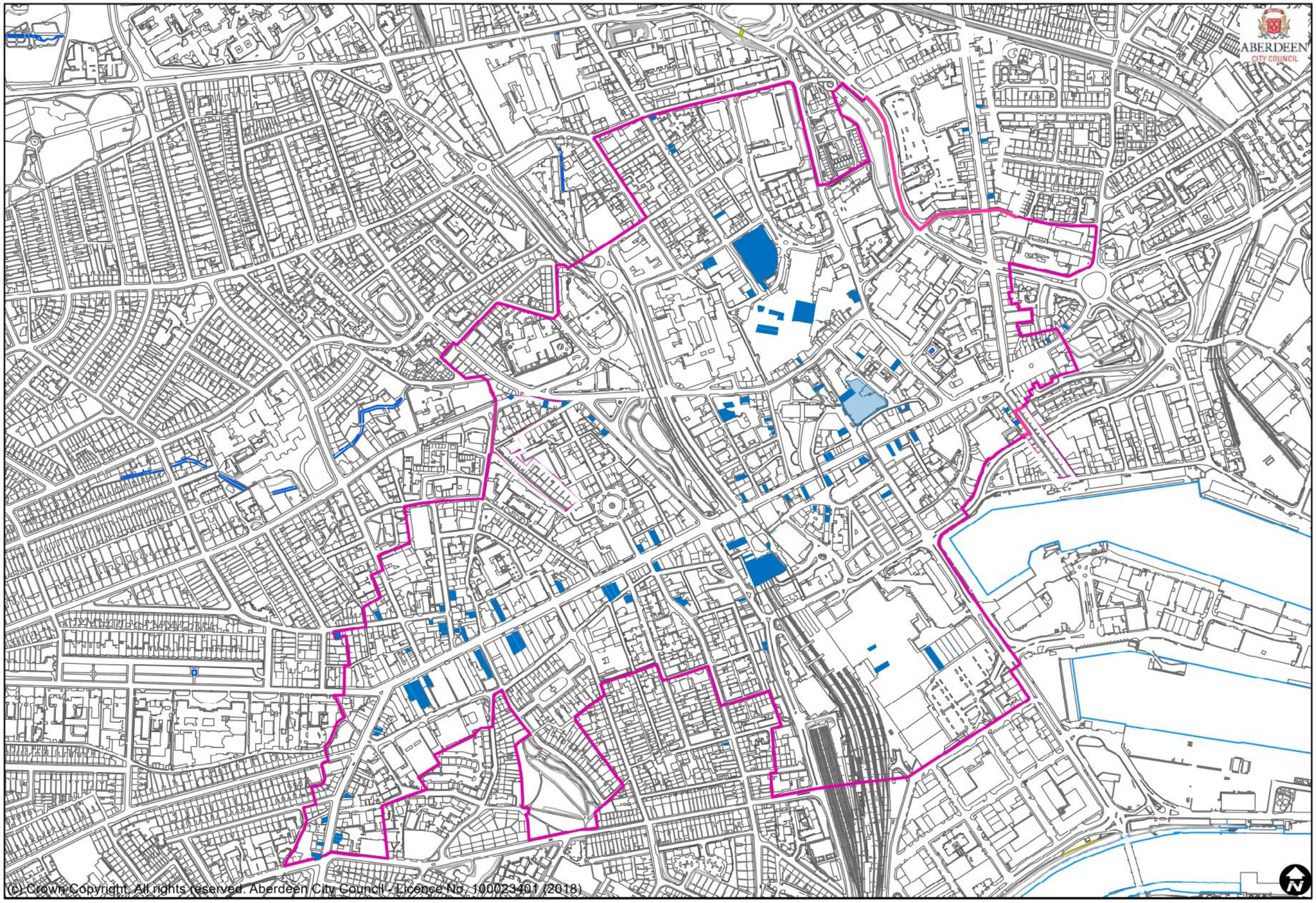


Figure 2.14: Distribution of Vacant Units – Aberdeen City Centre



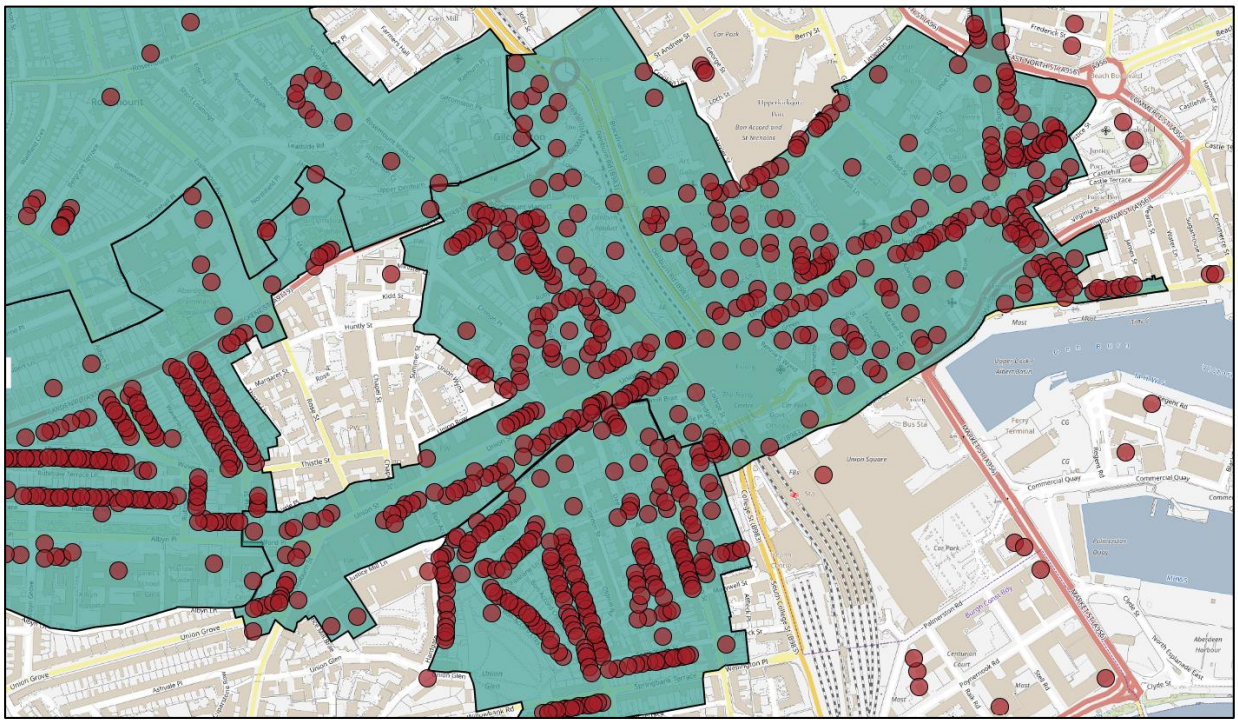
Environmental Quality/Amenity

2.64. 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 2023. In terms of environmental quality the principal changes are:

- The impact of vacant units on key streets – this includes the former BhS store on Union Street, vacant units in Bon Accord and the former John Lewis on George Street
- The demolition of the former market. The impact of this is short-term in that the new development of the replacement building is expected to commence within 12 months. It is expected that the new building will be, architecturally, more interesting than the former market building resulting in a significant environmental enhancement to this part of the city centre.

2.65. Large parts of the City Centre are of conservation importance with large numbers of listed buildings present and two conservation areas (Union Street and Bon Accord) cover the majority of the City Centre (see Figure 2.15).

Figure 2.15: Listed Buildings and Conservation Areas in Aberdeen City Centre (*source: PastMap)*



2.66. 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.

2.67. The key environmental issue for the City Centre remains 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. This has, however, improved significantly with the implementation of bus gates restricting the access of private vehicles to ley parts of the City Centre including the central parts of Union Street (from Market Street to Bridge Street). Furthermore the City Centre Low Emission Zone commenced on 1st June 2024.

Accessibility

2.68. 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). In 2013 there are were over 4700 managed off-street parking spaces and in the region of 9000 on-street parking spaces in the City Centre.

Pedestrian Flows

2.69. Figure 2.16 identifies footfall recorded for 2016 to 2023. 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 MRI Onlocation (formerly Spring-Board) on behalf the City Council. The Table shows that all locations, with the exception of Broad Street South, have recorded declines in footfall. Figure 2.17 illustrates annual footfall levels across the City Centre.

Figure 2.16: Aberdeen City Centre – Footfall since 2016

	Total Annual Pedestrian Flows (Million)					
Location	2012	2016	2017	2018	2023	Change 2018-2023
Belmont St		4.09	4.04	3.72	2.53	-32%
Bridge St		1.71	1.65	1.69	1.09	-36%
Broad Street North					0.76	
Broad Street South		1.25	1.31	1.08	1.12	4%
Castlegate		2.12	2.16	2.23	1.31	-41%
Guild St		2.13	2.07	1.95	1.91	-2%
Langstane Place		0.80	0.71	0.69	0.50	-27%
Market Street		5.19	4.71	4.38		
Market Street (new)					0.57	
Union Street		5.65	5.29	4.80	3.64	-24%
Union Street West End		2.59	2.52	2.47	2.22	-10%
Union Terrace		1.37	1.19	1.12	0.75	-33%
Upperkirkgate		4.29	4.10	2.99	2.32	-23%
Trinity Centre				7.90	4.50	-43%
Bon Accord/St Nicholas	17.5			15.00	12.48	-17%
Union Square	19.0			15.00	14.60	-3%
Average						-19%

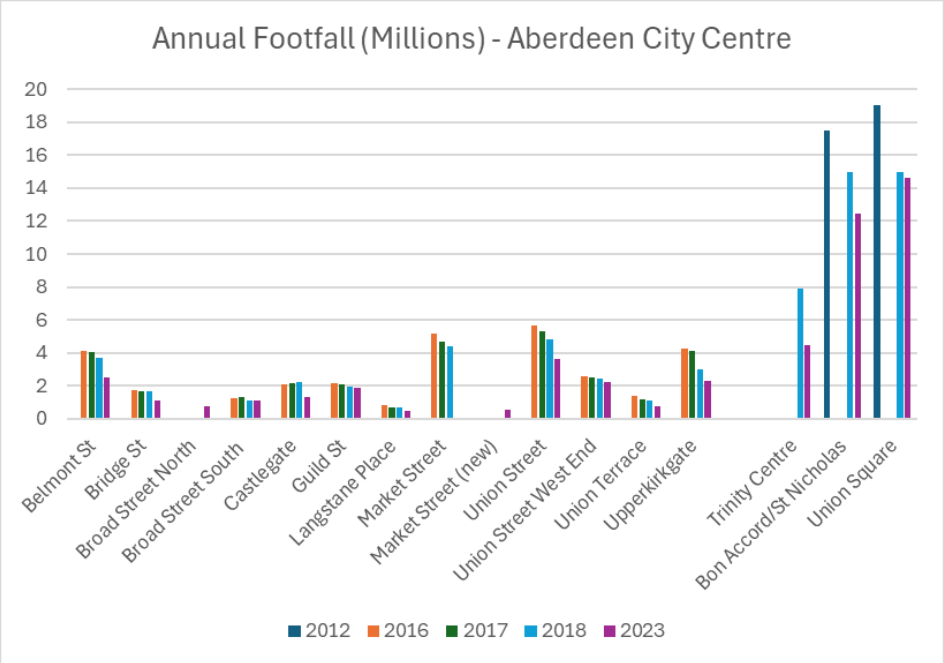
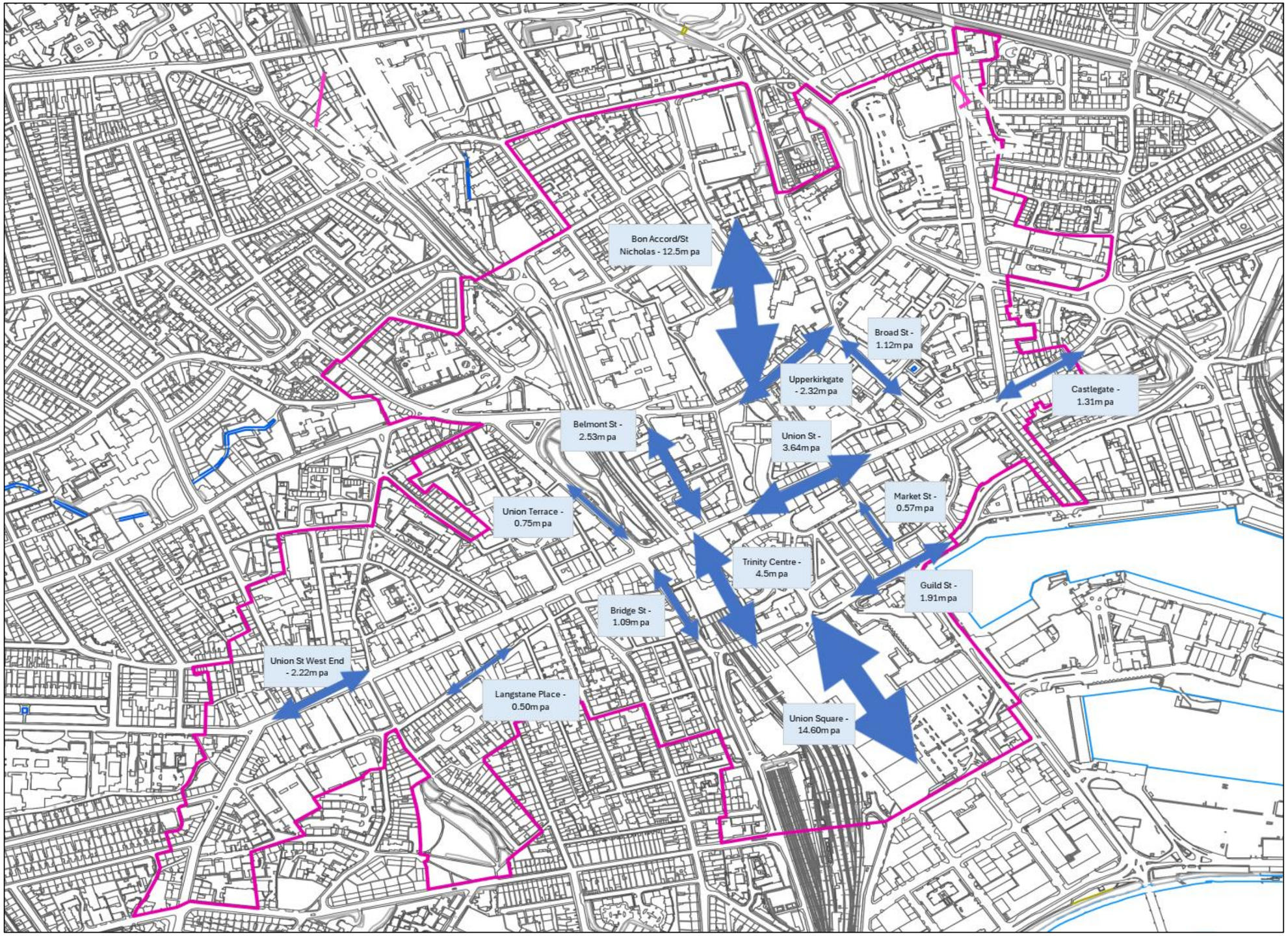


Figure 2.17: Aberdeen City Centre – Annual Footfall 2023



Public Perceptions of the City Centre

2.70. The household survey asked all respondents about frequency of visit to and attitudes about the City Centre. The results are presented in Figure 2.18. The principal findings from this are:

- For many of the issues raised views were generally neutral i.e. neither positive nor negative about the City Centre's offer – this included its offering for clothing, footwear and other general comparison goods, for furniture etc, easy of travel by private car and for personal business.
- Significantly positive views were expressed regarding: accessibility by public transport; and its leisure offer.
- Significantly negative views were expressed in relation to the ease and cost of parking and as an attractive place to visit. However, in relation to the last point it should be noted that the survey was undertaken during December and January and inclement weather may have affected this response.
- When compared to other centres included in the survey the City Centre was ranked relatively highly for each of: choice of shops for clothing etc, other personal goods, access by public transport, for leisure and for personal business. It was amongst the lowest ranked centres for travel by car, parking and as an attractive place.

2.71. In overall terms the views expressed were slightly positive and particularly so in terms of its comparison goods offer, which is significant given the increase in vacant units within the City Centre including closure of John Lewis.

2.72. In terms of frequency of visits the average number of visits per week across all interviewees was 0.7 with the distribution of frequency of visits evenly spread between those who visit regularly (i.e. multiple times per week) with those who visit infrequently. Only 17% of respondents across the whole of the study area stated that they do not ever visit the City Centre for any purpose. This response would indicate the importance of the City Centre for the vast majority of the population of the study area either as a place for frequent visits (e.g. if living/working close to or within the City Centre) for or occasionally for a specific purpose.

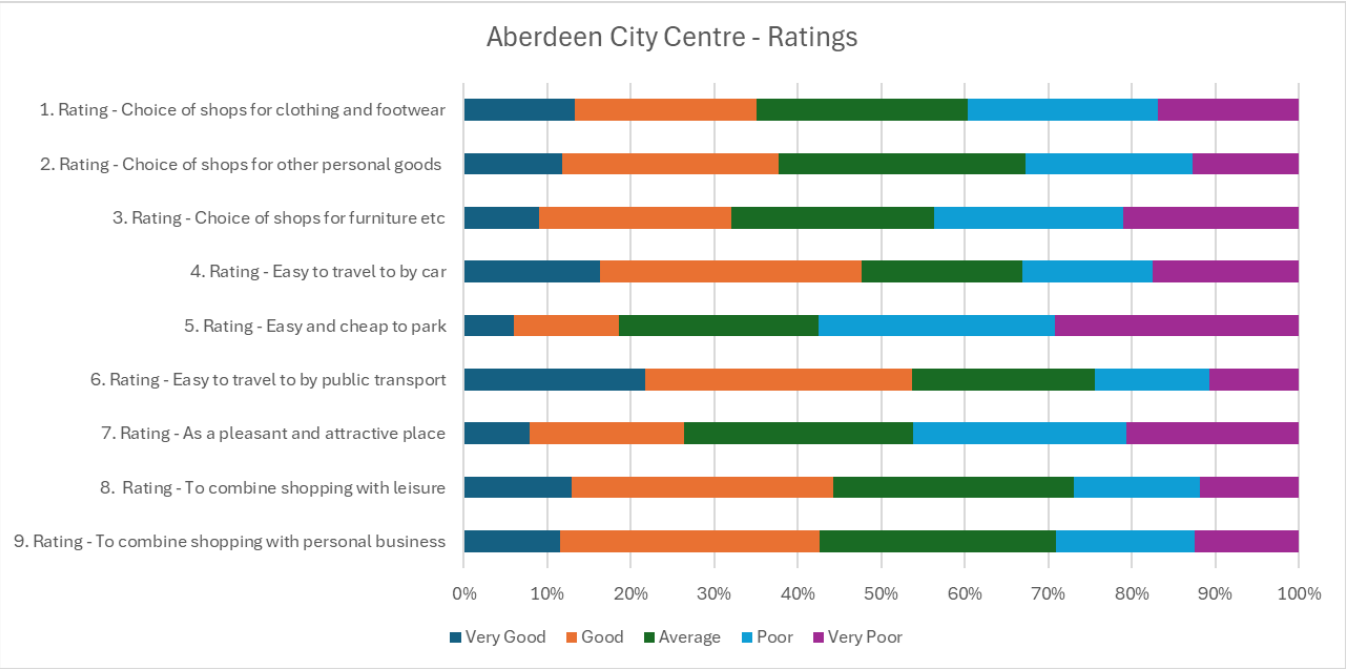
Future Expenditure Growth

2.73. Figure 2.19 sets out the forecasts of turnover growth from shops within the City Centre based on it maintaining market share within north east Scotland. This identifies a modest acceleration of growth in line with the different Experian growth scenarios – a reversal of the recent decline in expenditure seen since 2018. This forecast reflects growth in expenditure from residents within the catchment areas served by City Centre shops and also from visitors and tourists. Based on trends identified from STEAM reports undertaken for the City Council the retail model assumes tourism spend to grow by 43% between 2023 and 2038 (2.4% per annum) and growth in Aberdeenshire is identified to be just under 40% (2.2% per annum). The model assumes that a significant proportion of spend from tourists would be directed to shops in the City Centre. This is consistent, for example, with anticipated growth of tourism from cruise ships into the City and shire. Nonetheless, despite significant growth, total tourism expenditure will still account for only 4% of all expenditure for retail goods within the study area in 2038.

2.74. Figure 2.20 provides a summary of the principal characteristics of the City Centre including its catchment area, floorspace and turnover.

Figure 2.18: Views of Aberdeen City Centre

Aberdeen City Centre	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	13%	12%	9%	16%	6%	22%	8%	13%	12%
Good	22%	26%	23%	31%	13%	32%	19%	31%	31%
Average	25%	30%	24%	19%	24%	22%	27%	29%	28%
Poor	23%	20%	23%	16%	28%	14%	25%	15%	17%
Very Poor	17%	13%	21%	17%	29%	11%	21%	12%	13%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-5%	5%	-12%	14%	-39%	29%	-20%	17%	14%
Balance Rank (of 14)	4	3	6	14	14	4	12	3	4



Aberdeen City Centre Masterplan

2.75. The Aberdeen city centre masterplan, published in 2015, provides a 20 year development strategy for the City Centre encompassing a range of development projects and initiatives. A summary of the scope of initiatives for different parts of the City, taken from the masterplan is set out in Figure 2.19 – this illustrates that the interventions includes transport, infrastructure and environmental improvements, proposals for redevelopment of sites, events and so on – in total 49 projects have been identified.

Figure 2.19: City Centre Masterplan Intervention Areas

	Area of intervention	Masterplan focus
1	**Denburn Valley**	A revitalised Union Terrace Gardens establishes itself as a key destination and the linking thread to a new residential quarter.
2	**Heart of the City**	Reinstating the central role of Union Street in the life of the city, establishing stronger retail linkages north and south and creating a destination not just for shopping but for many city activities.
3	**Queen's Square**	A new city centre neighbourhood with a strong urban character. An exemplar of the best of urban living in a sensitive historic context.
4	**Union Street West**	A focus for the wider business sector, from new businesses with a Made in Aberdeen focus, to spin-outs from the energy sector. Union Street West emerges as a much stronger business address.
5	**Station Gateway**	The critical remodelling of the key gateway to the city centre, with new business and commercial developments, providing city centre users and visitors with a radically transformed arrival experience, leading seamlessly northwards to Union Street.
6	**Castlegate /Castlehill**	A focus for visitors and tourists, taking in the best of Aberdeen's townscape, including Castlegate, Union Street and links to the harbour to the south and the beach to the east.
7	**North Dee / Torry Waterfront**	New riverside quarters connected by a pedestrian bridge and a much improved riverside park and promenade. To the north, an urban business district; to the south, a residential neighbourhood that maximises its relationship to the river.

2.76. The successful implementation of the majority of the identified projects will increase the attractiveness of the City Centre as a place to visit and undertake business. In particular, the environmental and transport improvements are expected to increase the attractiveness of the City Centre as a leisure destination. However, this will be a long process and it is evident from the changes identified in terms of reductions in numbers of retail and related units, floorspace and turnover that have occurred over the past decade that there are strong economic imperatives that have had major adverse impacts on the City Centre in recent years.

Key Findings

2.77. The review of the City Centre identifies a number of key issues and changes that have occurred since 2013 and 2018 which are relevant to the review of the strategy for the City Centre:

2.78. 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.

2.79. There has been a steady reduction in the number of shop units retailing goods which has been sustained over the past decade. 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).

2.80. There has been a significant increase in the numbers of vacant units within the City Centre – this has been more rapid than comparable regional centres. Vacancies by number of units are close to UK averages but

are significantly above average by floorspace. This floorspace figure reflects primarily the closure of both the John Lewis and Debenhams department stores.

2.81. Vacant floorspace is concentrated in the John Lewis/Bon Accord part of the city centre. This is likely to reflect a number of factors including:

- A shift in the focus of gravity of the City centre to Union Square
- Particular difficulties faced by department stores which have been especially is vulnerable to ongoing competition from both the internet but also variety stores.
- Issues associated with logistics and peripherality for servicing the NE of Scotland adding additional costs not borne by stores in other parts of the UK
- Impact of the closure of John Lewis impacting on footfall through Bon Accord undermining the attractiveness of this location for multiples for clothing/fashion goods.
- Recent real decline in expenditure for both convenience goods between 2018 and 2023

2.82. Footfall has reduced significantly across the City Centre, including in the prime retail frontages, since 2012 and since 2018. Footfall declined between 2022 and 2023 suggesting that this is not related to a the post-covid recovery.

2.83. Major planning applications for extensions/new development linked to both Bon Accord and Union Square have not been implemented and there is no expectation that they will be implemented by the new owners of these centres.

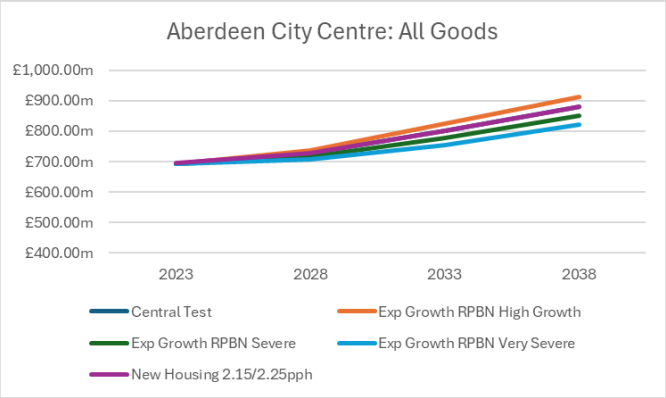
2.84. Each of the principal retail destinations within the City Centre, namely Union Square, Bon Accord/St Nicholas, Trinity and John Lewis have all been sold in the last two-three years. These were all at levels significantly below previous peak valuations. The decisions of the new owners regarding these assets are critical for the future of the City Centre. Particularly significant is that EP Properties now own a substantial portion of the northern part of the retail core.

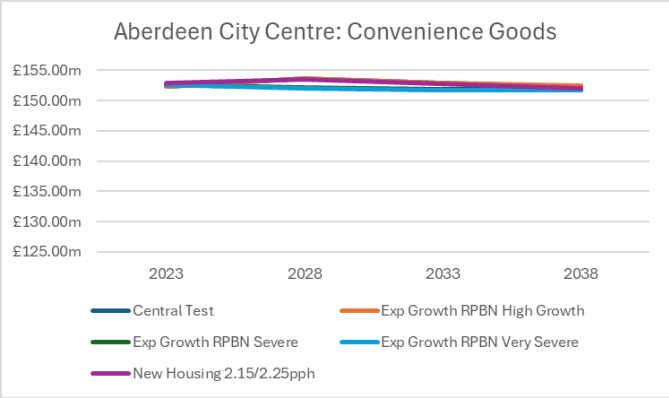
2.85. Services and entertainment activities are a critical component of the City Centre economy. These uses are prevalent throughout the City Centre and it is evident that demand for these will continue in the long term.

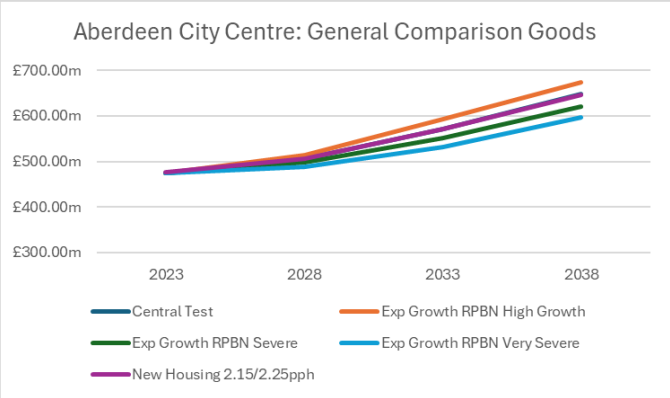
2.86. In the short term the most significant issue relates to the new ownership of significant parts of the City Centre and their intention regarding the future of these assets. In the long term it is anticipated that expenditure growth will resume and that this will support the growth of retail and services within the City Centre although the extent to which peripherality will act as a restraint on growth remains to be established.

2.87. In the context of both Aberdeen and the north east as a whole peripherality has two key aspects. On the one hand there is the cost associated with logistics and servicing businesses. In the case of John Lewis this probably reflects that the next nearest department store in the group was located over 100 miles to the south and this company has been known to be sensitive to costs for servicing Scotland in the past (John Lewis chose not to implement a planning consent for Waitrose in Ayr in 2014 in large part due to the cost of servicing Scottish stores). The second factor is that the Aberdeen economy does not tend to follow the same economic cycle experienced in London and other parts of the UK due to the importance of the energy sector. This can be a source of uncertainty despite the fact that the market served by the City Centre is significant, is wealthy and there is limited competition.

Figure 2.19: Forecast Turnover growth – Aberdeen City Centre 2023-2038







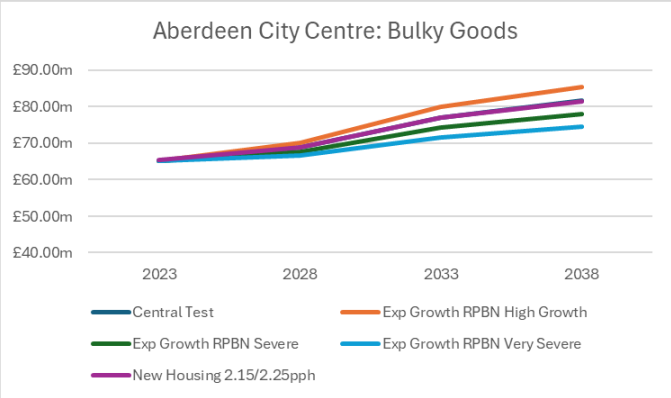
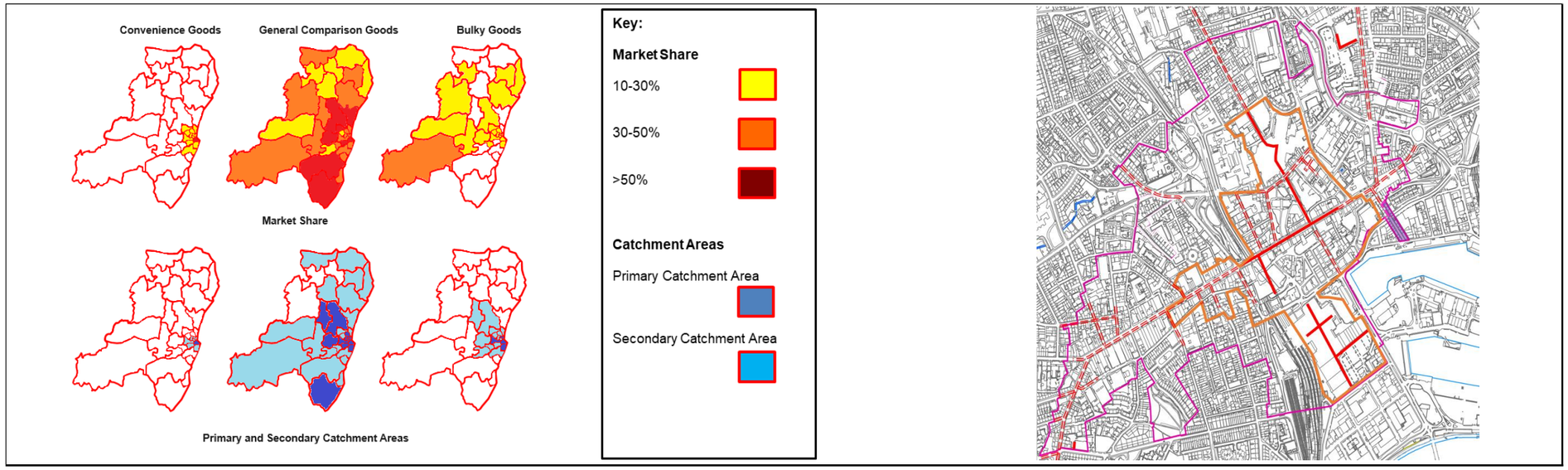


Figure 2.20: Summary – Aberdeen City Centre



Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	377	47033	30573		152.3	114658	75140		475.3	11267	7615		65.1	172958	113329		692.7
Retail Services	503													93729			
Vacant	111													55300	17%		
ALL RETAIL GOODS AND SERVICES	**991**	**47033**	**30573**		**£152.29m**	**114658**	**75140**		**£475.34m**	**11267**	**7615**		**£65.07m**	**321987**			**£692.69m**

Recent Changes

Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 prices
2004	74	397	308	65	844	£691.89m
2013	75	385	365	66	891	£930.91m
2018	68	325	436	83	912	
2023	114	263	503	111	991	£692.69m
					change 2013-23	-26%
					change 2004-23	+0%

Vitality and Viability Summary

Strengths: Above average 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 investment. Typical Promis ranking 20-30 out of largest 200 UK Centres

Weaknesses

Weaknesses: Significant loss of retail ; vacancies increased in recent years; adverse impacts of traffic on amenity; pedestrian congestion; limited actual investment in recent years - lack of progress with proposed major schemes

Others

2023 surveys of perception of centre indicate: **Good** for choice of shops for full ranges of retail goods, for public transport accessibility and as a good place to combine trips for a range of purposes. Less attractive in terms of access by car, for parking and not considered pleasant/attractive.

Vacancies are close to/marginally below average by numbers of units and floor area but, as result of closure of John Lewis and Debenhams vacant floorspace has increased significantly since 2018 and isabove average.

Summary: generally strong indicators of vitality and viability but key indicators have declined since 2013 and 2018. Key reason relates to closure of John Lewis, Debenhams and poor performance of Bon Accord.

Retail Strategy Summary

Centre Classification	City Centre
Planning Policy Approach	Protection and promotion of significant new retail floorspace
Proposed Retail Floorspace	
Commitments	Redevelopment of Market
Proposals	Proposals for bon Accord and Union Square not progressed.

3. Aberdeen – Town, District and Other Centres

Overview

3.1. This section sets out a summary review of the town centres, district centres and commercial centres as identified in the Aberdeen City LDP 2023. It is helpful to provide an overview of the changes that have been identified for each of these centres since the first retail study in 2004. This overview is provided in Figure 3.1 which identifies changes in the total floorspace of centres (i.e. combined retail, service and vacant space) and Figure 3.2 which identifies changes in turnover (in 2021 prices). These two figures also include a selected number of Neighbourhood Centres which have been included in earlier studies together with the King Street Neighbourhood Centre which was previously included within the boundary of the City Centre.

3.2. Figure 3.1 shows that there have been limited changes in retail/service floorspace within the centres, particularly since 2018. Figure 3.2 shows that. For most centres, turnover increased from 2004 to 2013. Information for 2018 should be treated with caution because the turnover was based on an assumed increase in available expenditure between 2013 and 2018 which, to a large extent, did not materialise. Turnover in 2023 is identified to be, generally lower than 2018 but, in part this reflects an over-optimistic assessment of turnover in 2018, a more reliable comparison is between 2023 and 2013. This shows that some centres have experienced modest increases in turnover whereas others have declined slightly. During this period there was an overall increase in available expenditure (both gross and net of SFT) whereas turnover in centres outwith the City Centre, in broad terms, remained at broadly similar levels. The primary reason for this is an increase in turnover in Aberdeenshire centres (notably in Inverurie) which is shown in Figures 4.1 and 4.2.

3.3. The changes identified are reviewed for each centre below.

Figure 3.1: Changes in Floorspace – Aberdeen Centres 2004-2023

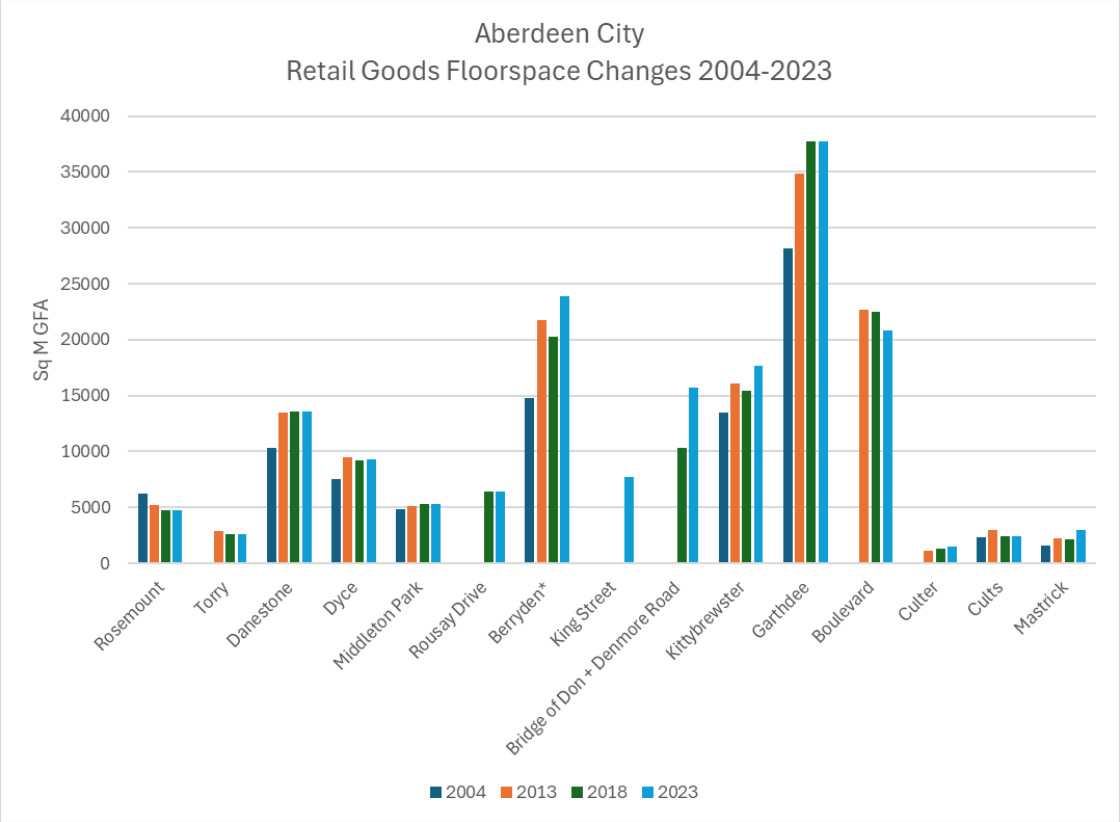
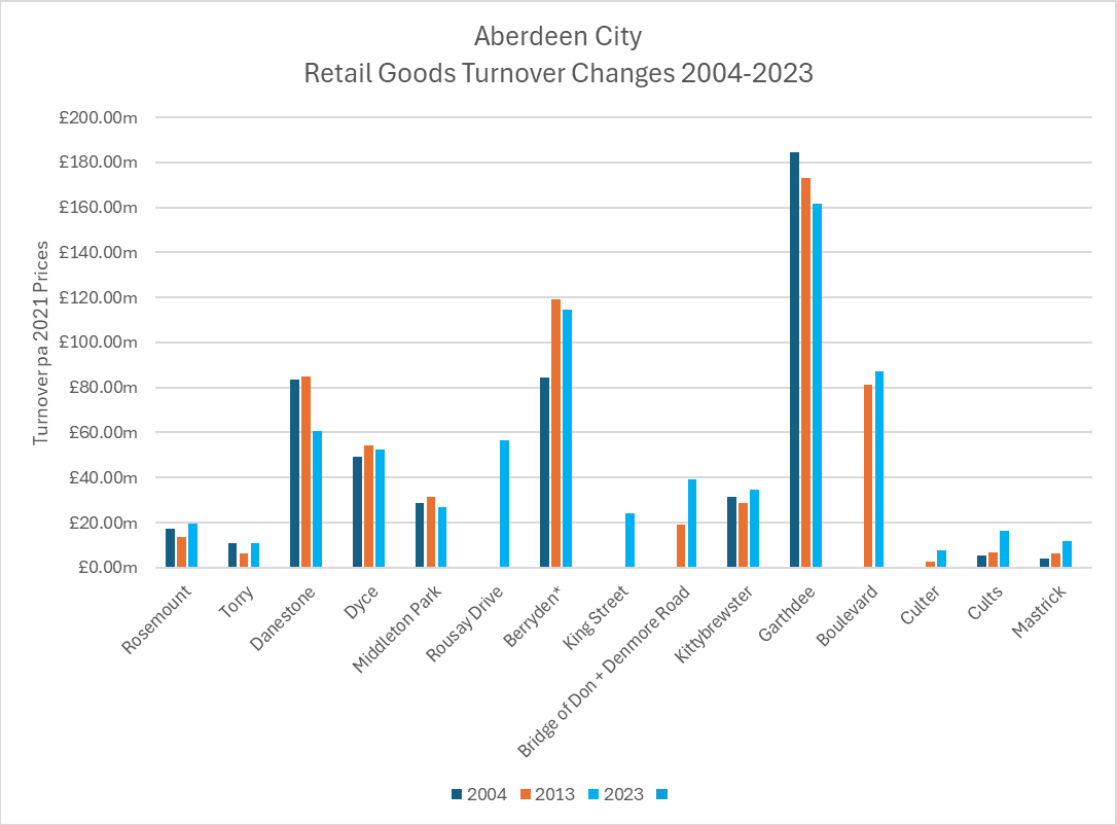


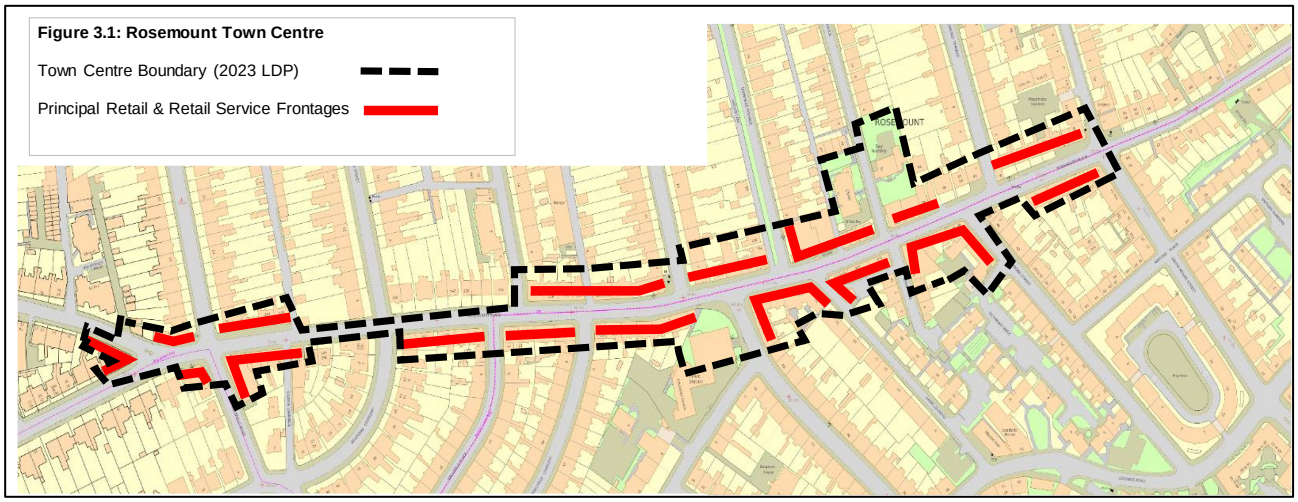
Figure 3.2: Changes in Retail Turnover – Aberdeen Centres 2004-2023 (2021 Prices)



Rosemount Town Centre

3.4. Figure 3.3 identifies the extent of Rosemount town centre as defined in the LDP.

Figure 3.3 Rosemount Town Centre



Space in Use

Numbers of Units by Type

3.5. Figure 3.4 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 3.4: Rosemount Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	19	10	8	9
Comparison	38	33	28	23
Retail, Leisure + Business Services	21	41	40	51
Vacant	2	4	10	8
TOTAL	80	88	86	91
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	2289	2243	2116	2012
Comparison	3924	2921	2638	2776
Retail, Leisure + Business Services	1849	3141	2622	3843
Vacant	96	213	1003	644
TOTAL	8158	8518	8379	9275

Changes Over Time

3.6. Examination of Figure 3.4 indicates some trends in changes in provision since 2004 in particular the overall reduction in convenience goods shops (although not in terms of floorspace). Vacancies have not significantly changed in the past decade but were lower prior to this.

Vacancies

Vacancy Rates

3.7. Figure 3.4 also sets out information on vacancies within Rosemount town centre. In 2023/24 the vacancy rates were:

- Number of units: 9%
- Floor area: 7%

3.8. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Rosemount town centre's vacancy rate is significantly below the UK average by both number and area of vacant units.

Changes over Time

3.9. Figure 3.4 indicates that vacancies have reduced slightly since the 2018 survey but are higher than in 2004 and 2013.

Additional Facilities/Services

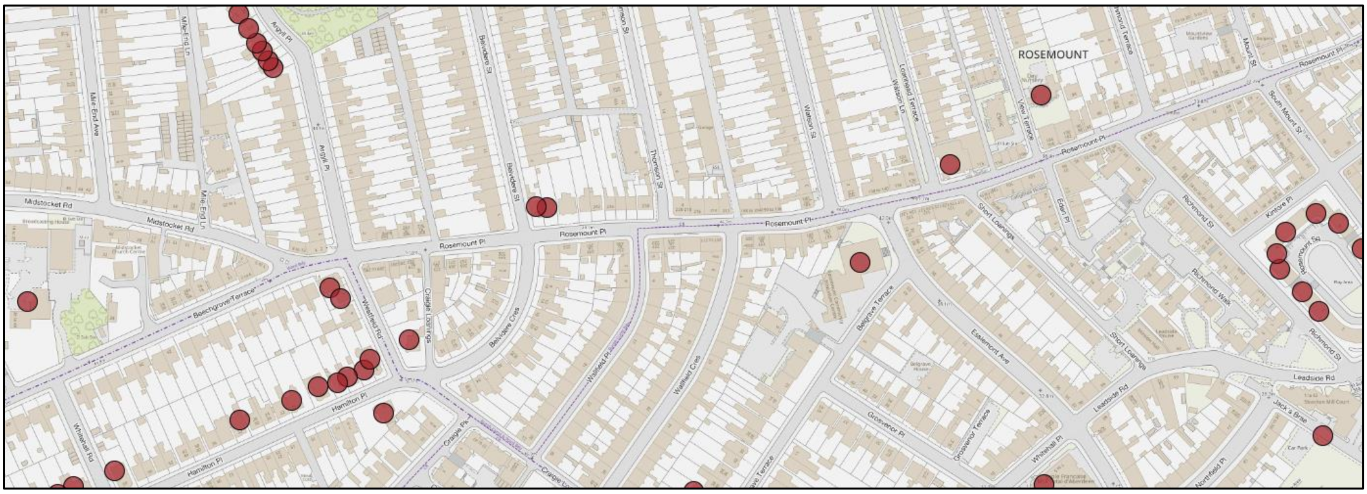
3.10. Rosemount provides only a limited range of facilities and services in addition to retail/retail services. These include:

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

Heritage

3.11. There are 5 listed buildings within the town centre with the greatest concentration along the north side of Rosemount Place. The whole of the town centre is included within the Rosemount and Westburn Conservation Area. Figure 3.5 identifies the location of the listed buildings (the CA covers the whole of the plan area except for the western part from Midstocket Road).

Figure 3.5: Rosemount Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)



Household Survey Perceptions of the Town Centre

3.12. Figure 3.6 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for general comparison goods (all categories) is rated between average and "poor" by residents (net balance of -11% to -31% of positive views). Choice of shops for bulky goods is identified to be very poor.
- Access to the town centre by car and by public transport is identified as "good" to "very good but parking is identified to be "average" to "poor" – this may well reflect the difficulty of on-street parking.
- The town centre is identified as "good" to "very good" as a pleasant and attractive place to visit.
- Ratings are slightly better than average to combine shopping with leisure but poor for personal business.

3.13. In overall terms the town centre was viewed as average across all indicators for all the centres included within the survey.

Frequency of Visit

3.14. The household survey identified that, for those living within postcode sectors close to Rosemount, the average number of visits was between 1 and 2 per week. This emphasises the role of the centre as a location to access local shopping and/or services on a frequent basis.

Conclusions

3.15. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally healthy picture of the health of the centre, taking into account the limited size of the centre:

- Vacancies are below national averages and have declined slightly since 2018.
- The retail goods offer within the centre is limited and less than one would expect from a location designated as a "town centre". The primary role of the centre is the provision of local retail and leisure services.
- Numbers of comparison goods shops have declined significantly since 2018 whereas services have increased.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is high despite not having any significant areas of traffic calming/pedestrianisation. Although there are few listed buildings the historic character of the area is evident. This is viewed positively by residents. Low levels of vacancies will also create a positive impression to both residents and visitors.
- The centres is seen as easy to access by both public and private transport but problems are noted regarding car parking.
- Household interview responses provide, on balance, slightly positive views of the town centre but a key weakness is the perceived poor offering for both general and bulky comparison goods.

Rosemount Town Centre: Turnover, Catchment Area and Future Growth

Turnover and Sales Densities

3.16. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 9 units; 2012 sq m GFA; 1308 sq m NFA (sales); and £10.65m turnover. The most significant units are the Co-op and Sainsbury stores.
- General Comparison and Bulky Goods: 23 units; 2776 sq m GFA; 1805 sq m NFA (sales); and £8.89m turnover.
- Services: 51 units; 3843 sq m GFA
- Vacancies: 8 units; 644 sq m GFA

3.17. This confirms that, although services are the largest category of retail floorspace within the centre they do not dominate floorspace, instead a significant proportion of space and turnover is for convenience and comparison goods sales.

3.18. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 72% of national averages.
- General comparison goods densities are close to national averages (100%).
- Bulky goods appear to be trading above national average levels (147%).

3.19. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Rosemount to trade at levels slightly below national averages and, in this context, trading levels appear healthy. In contrast convenience sales densities are lower than one might expect where a significant proportion of floorspace is in convenience-format stores.

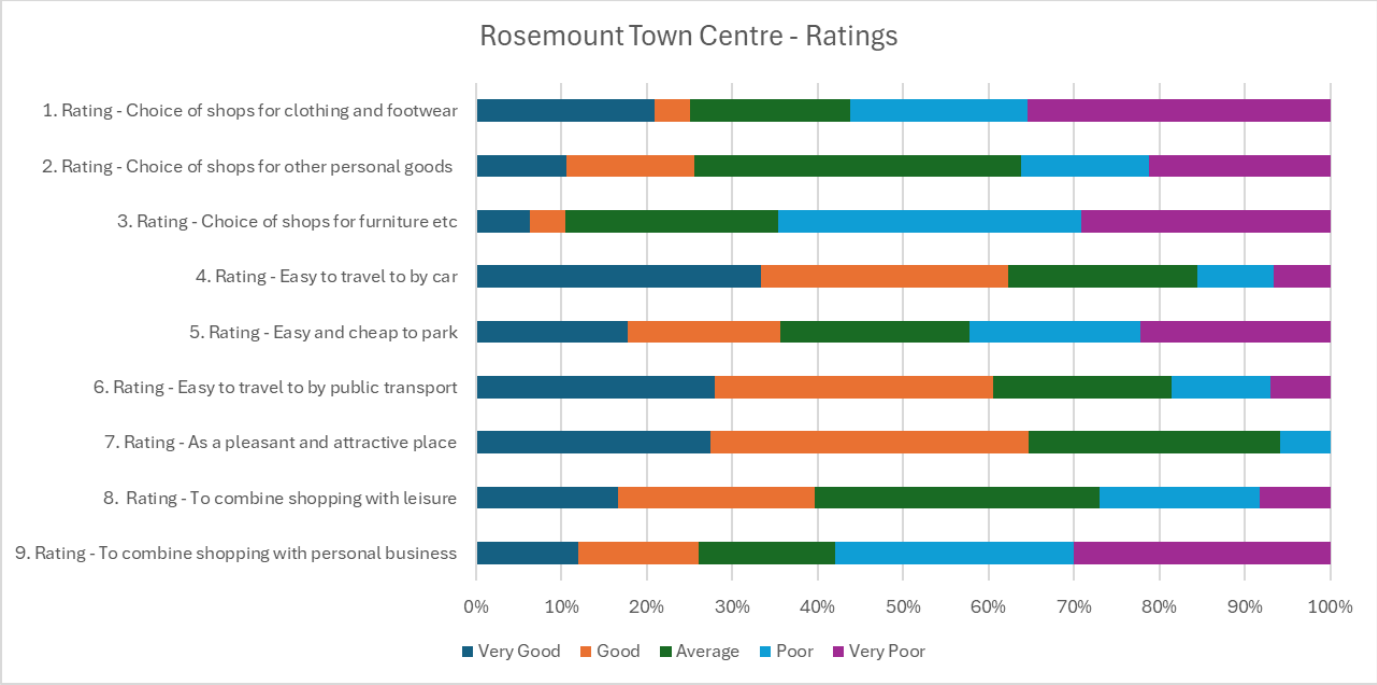
Catchment Area and Market Penetration

3.20. Figure 3.7 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Rosemount Town Centre and also the levels of market penetration for different goods categories. The figure also summaries other key information for the town centre in 2023 including the location of principal retail frontages within the town centre. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA are both limited to the areas around the centre i.e. study zone 27. Market penetration levels in this area are low (<10%).
- Both General Comparison and Bulky Comparison Goods are similar to convenience goods : the centre's PCA and SCA are both limited to the areas around the centre i.e. study zone 27. Market penetration levels in this area are low (<10%).

Figure 3.6 Household Survey: Attitudes to Rosemount Town Centre

Rosemount TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	21%	11%	6%	33%	18%	28%	27%	17%	12%
Good	4%	15%	4%	29%	18%	33%	37%	23%	14%
Average	19%	38%	25%	22%	22%	21%	29%	33%	16%
Poor	21%	15%	35%	9%	20%	12%	6%	19%	28%
Very Poor	35%	21%	29%	7%	22%	7%	0%	8%	30%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-31%	-11%	-54%	47%	-7%	42%	59%	13%	-32%
Balance Rank (of 14)	6	6	9	11	13	2	4	5	7



Future Changes in Retail Turnover: Rosemount Town Centre

3.21. Figure 3.8 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

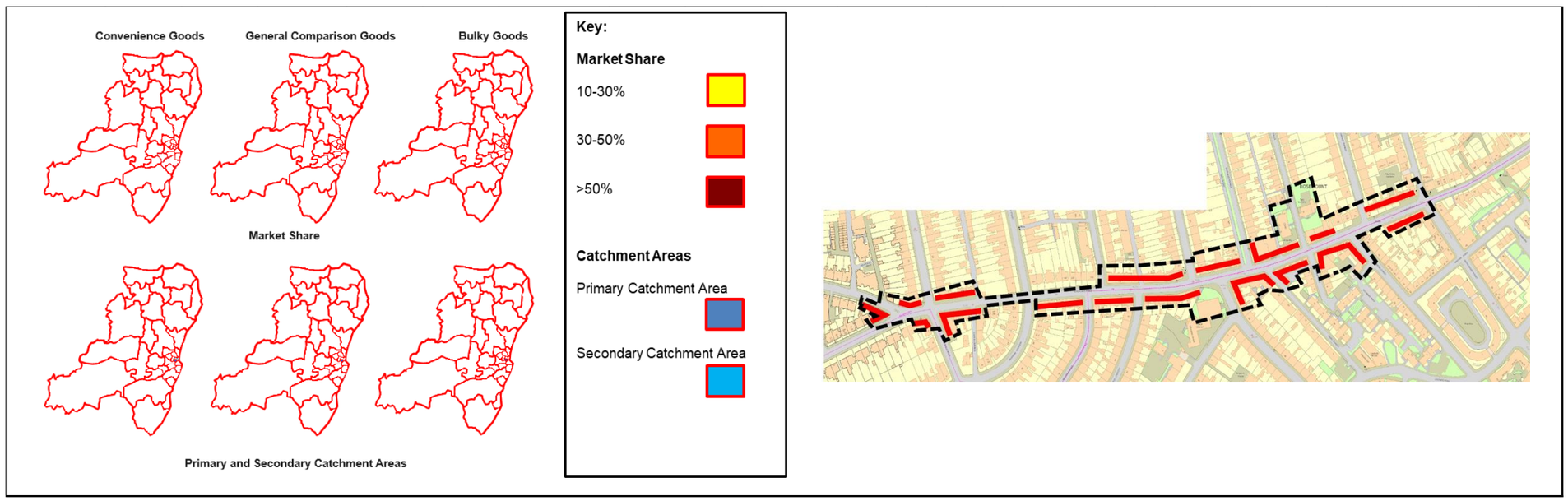
3.22. The principal forecasts are:

- Decrease in convenience turnover to 2028 (reflecting national expenditure growth forecasts) and thereafter a slower rate of decline.
- Significant growth for general comparison and bulky goods turnover

3.23. In overall terms turnover for the town centre is to be flat to 2028 and , thereafter to grow steadily to 2038.

3.24. Sales densities for convenience goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 3.7: Rosemount Town Centre - Key Retail Characteristics



Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Floorspace (Retail Goo	41	2012	1308		10.65	1940	1261		6.30	837	544		2.59	4788	3112		19.54
Retail Services	51													3843			
Vacant	8													644	0		
ALL RETAIL GOODS AND S	**100**	**2012**	**1308**		**£10.65m**	**1940**	**1261**		**£6.30m**	**837**	**544**		**£2.59m**	**9275**			**£19.54m**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	19	38	21	2	80	£17.09m
2013	10	33	41	4	88	£13.64m
2018	8	28	40	10	87	
2023	9	23	51	8	91	£19.54m
					change 2013-23	+43%
					change 2004-23	+14%

Vitality and Viability Summary

2023 surveys identified above average levels of satisfaction for all comparison goods shopping and also in terms of combining with leisure and personal business, as a pleasant and attractive place to visit as well as for access by public transport. The only negative views were asssociated with access by private car and parking.

Strengths: Ease of movement within centre; environmental quality of centre; reasonable range of retail offer; strong independent sector; public transport accessibility.

Vacancies, although significantly higher than 2004 have stabilised and are slightly below national average (8% by number of units and 7% by floorspace in 2023).

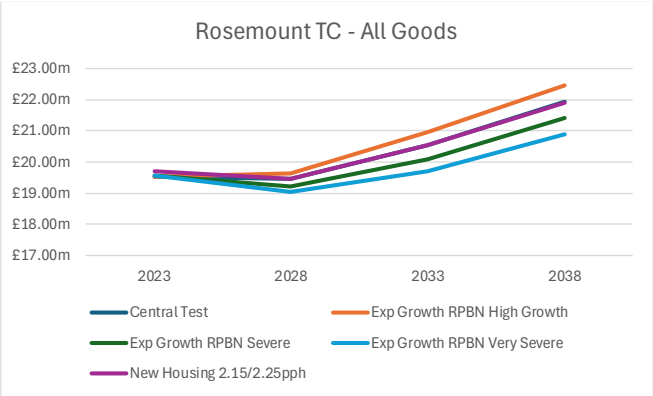
Weaknesses: Limited food retail offer (no major main food shop); limited multiples; limited non-retail facilities; adverse impacts of traffic on amenity; lack of car parking.

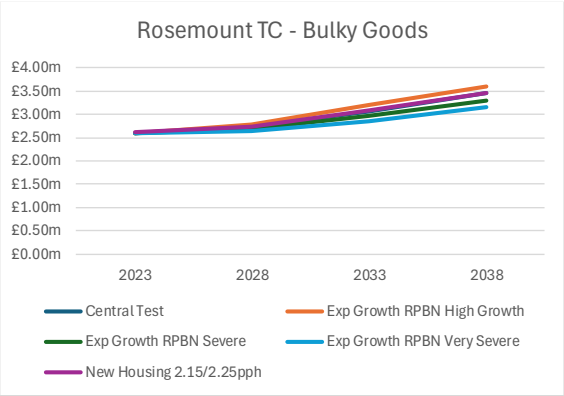
Summary: Although the centre has a relatively limited retail offer it exhibits generally average-strong indicators of vitality and viability. Has improved since 2018.

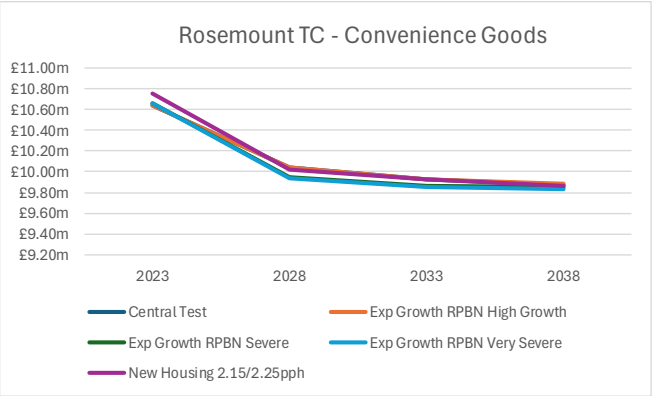
Retail Strategy Summary

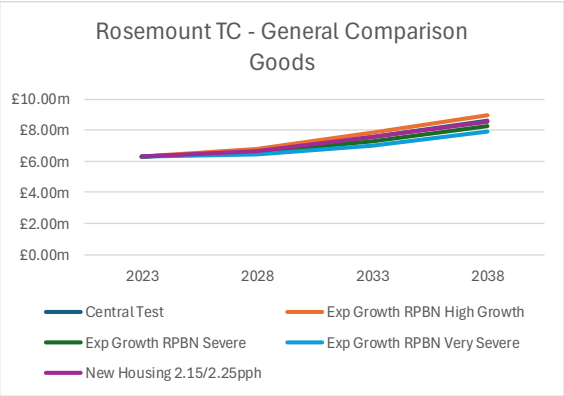
Centre Classification	Town Centre
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	

Figure 3.8: Forecast Future Turnover of Rosemount Town Centre





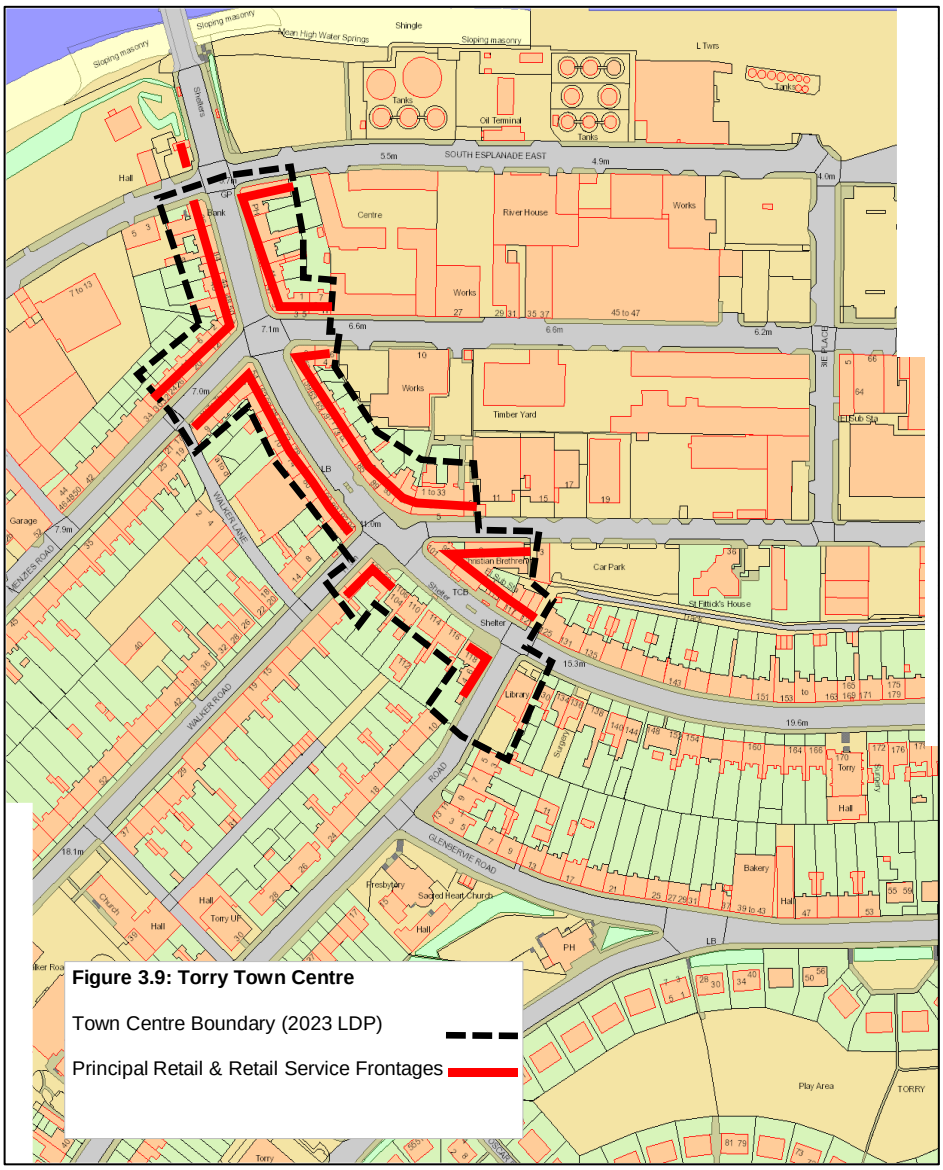




Torry Town Centre

3.25. Figure 3.9 identifies the extent of Torry town centre as defined in the LDP.

Figure 3.9 Torry Town Centre



Space in Use

Numbers of Units by Type

3.26. Figure 3.10 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 3.10: Torry Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	13	8	8	7
Comparison	17	14	10	9
Retail, Leisure + Business Services	18	32	25	26
Vacant	7	7	4	14
TOTAL	55	61	47	56
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	1808	1410	1515	1607
Comparison	1734	1436	1070	993
Retail, Leisure + Business Services	1551	2325	1702	1806
Vacant	331	381	211	839
TOTAL	5424	5552	4498	5245

Changes Over Time

3.27. Examination of Figure 3.10 indicates some trends in changes in provision since 2004 in particular the overall reduction in convenience goods shops (although not in terms of floorspace) and growth of retail service units. Vacancies have also grown significantly, particularly since 2018.

Vacancies

Vacancy Rates

3.28. Figure 3.10 also sets out information on vacancies within Torry town centre. In 2023/24 the vacancy rates were:

- Number of units: 25%
- Floor area: 16%

3.29. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Torry town centre's vacancy rate is significantly above the UK average by both number and area of vacant units.

Changes over Time

3.30. Figure 3.10 indicates that vacancies reduced to 2018 but have since increased to significantly higher than the long term historic average.

Additional Facilities/Services

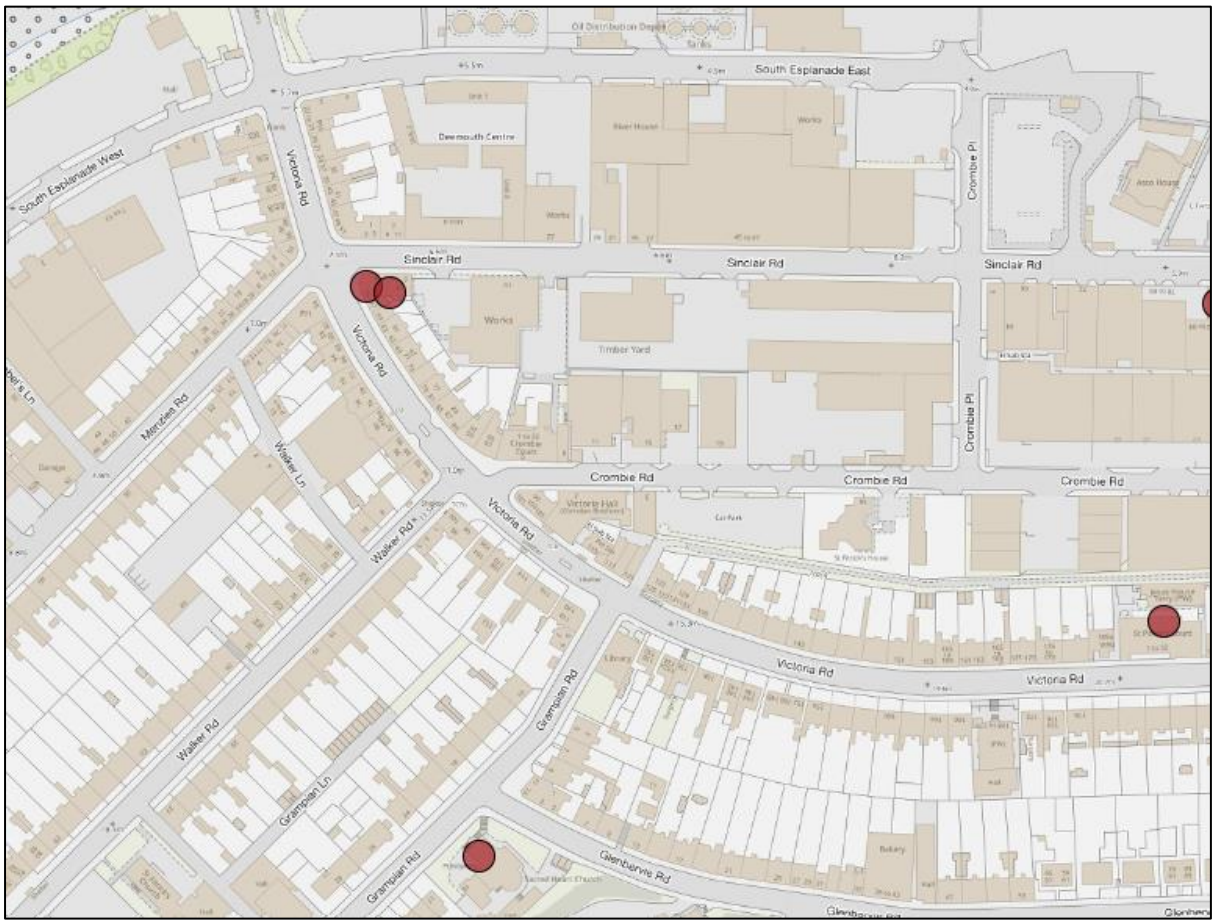
3.31. Torry provides only a limited range of facilities and services in addition to retail/retail services. These include:

- MSP Office
- Big Noise Torry
- Dentist
- Skills Centre
- Churches (2)
- Library
- Victoria Hall
- Police
- Pubs and Bars (2)

Heritage

3.32. There are 2 listed buildings within the town centre located at 53-57 Victoria Street – shown in Figure 3.11. No part of the town centre is located within a Conservation Area.

Figure 3.11: Torry Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)



Household Survey Perceptions of the Town Centre

3.33. Figure 3.12 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for general comparison goods (all categories) is rated at close to "average" with slightly positive overall ratings identified for general comparison goods and below average for bulky goods. This response is surprising given the very limited offer within the town centre and may reflect that these units cater for a specific market.
- Access to the town centre by car and by public transport is identified as "good" to "very good". Access by public transport is the highest rated of all centres covered in the survey.
- All other ratings are rated as close to "average" i.e. as an attractive place to visit, for leisure and for personal business.

3.34. Given the limited size of the town centre in terms of the range of shops and services available these responses can be considered to be surprisingly positive. In terms of the 14 centres covered in the household survey across all centres it's average rank was 6th which was the fourth highest of all centres. It is evident that, notwithstanding its limited size, the centre is viewed quite positively by those who visit the centre.

Frequency of Visit

3.35. The household survey identified that a significant proportion of those living within the same postcode sector as Torry never visit the centre (41% of total). However, for those who do they do so on a reasonably regular basis averaging one visit per week. This suggests that some visit for routine top-up trips and others on an occasional basis for specialist requirements.

Conclusions

3.36. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally mixed picture of the health of the centre, taking into account its limited size:

- Vacancies are significantly above national averages and have increased notably since 2018.
- The retail goods offer within the centre is limited and less than one would expect from a location designated as a "town centre". The primary role of the centre is the provision of local retail and leisure services but also some specialised services/goods.
- Numbers of comparison goods shops have declined significantly since 2018 whereas services have increased.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is mixed.
- The centre is seen as very easy to access by both public and private transport.
- Household interview responses provide, on balance, generally positive views of the town centre including those of the retail offer, leisure and other services.

Torry Town Centre: Turnover, Catchment Area and Future Growth

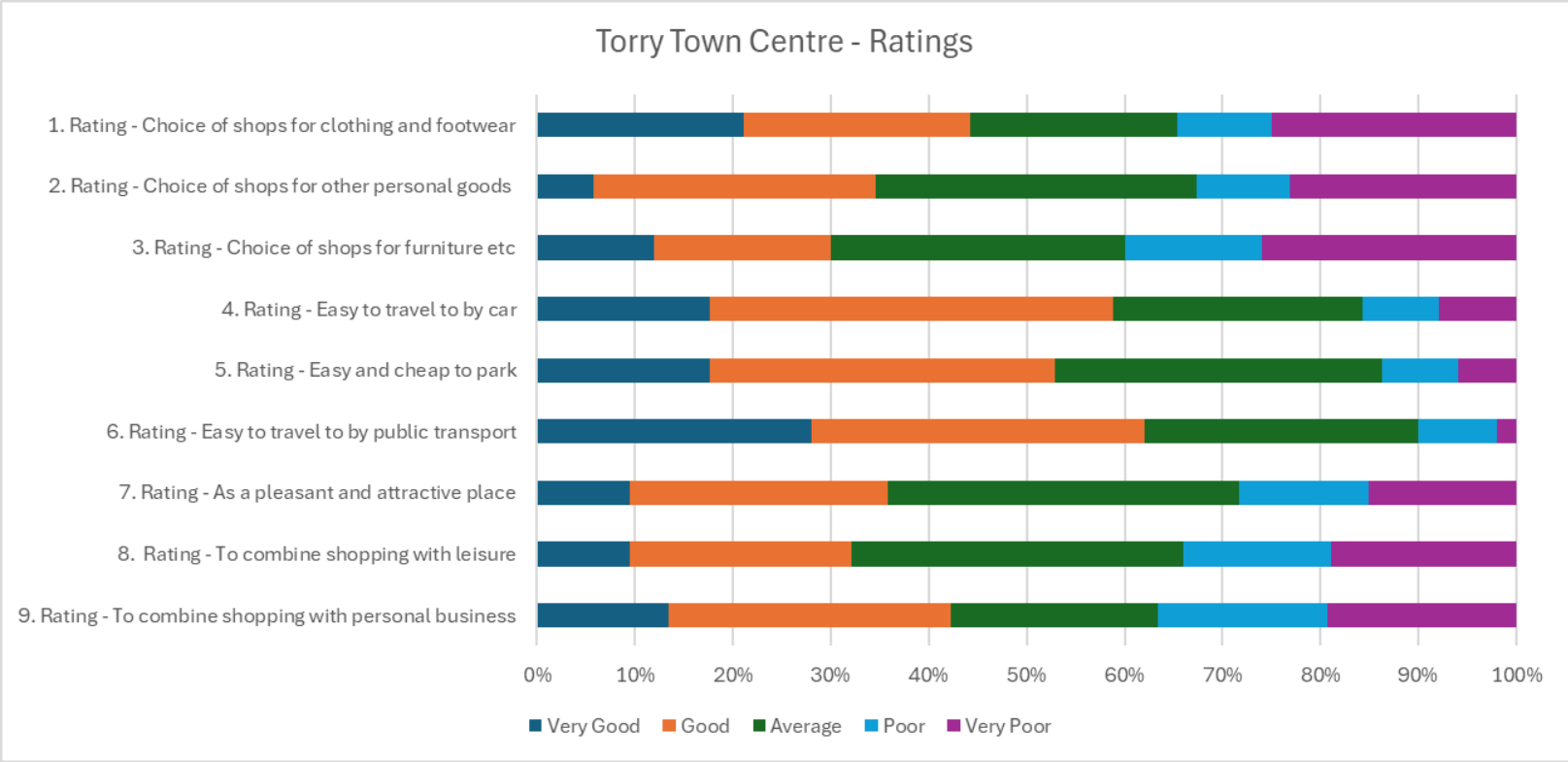
Turnover and Sales Densities

3.37. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 7 units; 1607 sq m GFA; 1044 sq m NFA (sales); and £7.64m turnover. The most significant unit is the Spar.
- General Comparison and Bulky Goods: 9 units; 993 sq m GFA; 646 m NFA (sales); and £3.23m turnover.
- Services: 26 units; 1806 sq m GFA
- Vacancies: 14 units; 839 sq m GFA

Figure 3.12 Household Survey: Attitudes to Torry Town Centre

Torry TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	21%	6%	12%	18%	18%	28%	9%	9%	13%
Good	23%	29%	18%	41%	35%	34%	26%	23%	29%
Average	21%	33%	30%	25%	33%	28%	36%	34%	21%
Poor	10%	10%	14%	8%	8%	8%	13%	15%	17%
Very Poor	25%	23%	26%	8%	6%	2%	15%	19%	19%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	10%	2%	-10%	43%	39%	52%	8%	-2%	6%
Balance Rank (of 14)	3	4	5	12	10	1	9	9	5



3.38. This confirms that, although services are the largest category of retail floorspace within the centre they do not dominate floorspace, instead a significant proportion of space and turnover is for convenience and comparison goods sales.

3.39. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 81% of national averages.
- General comparison goods densities are close to national averages (103%).
- Bulky goods appear to be trading above national average levels (116%).

3.40. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Torry to trade at levels slightly below national averages and, in this context, trading levels appear healthy. Convenience sales densities are close to levels one would expect for this type of location.

Catchment Area and Market Penetration

3.41. Figure 3.13 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Torry Town Centre and also the levels of market penetration for different goods categories. The figure also summaries other key information for the town centre in 2023 including the location of principal retail frontages within the town centre. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA are both limited to the areas around the centre i.e. study zone 30. Market penetration levels in this area are low (<10%).
- Both General Comparison and Bulky Comparison Goods are similar to convenience goods: the centre's PCA and SCA are both limited to the areas around the centre i.e. study zone 30. Market penetration levels in this area are low (<10%).

Future Changes in Retail Turnover: Torry Town Centre

3.42. Figure 3.14 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

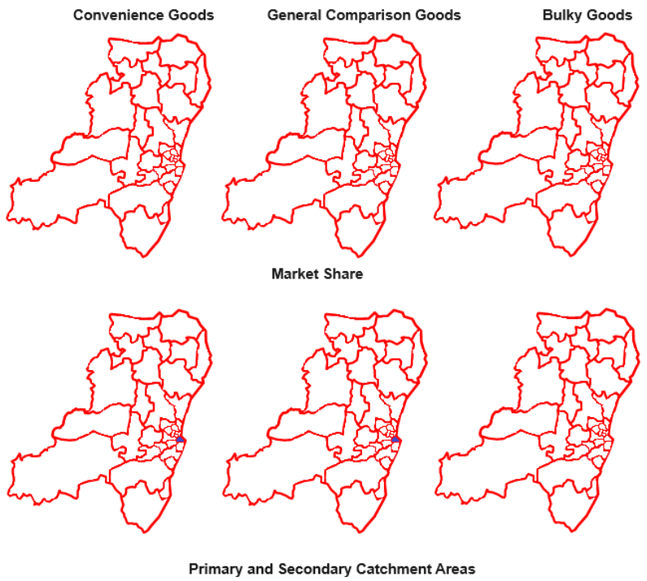
3.43. The principal forecasts are:

- Decrease in convenience turnover to 2028 (reflecting national expenditure growth forecasts) and thereafter a slower rate of decline.
- Significant growth for general comparison and bulky goods turnover

3.44. In overall terms turnover for the town centre is to be flat to 2028 and, thereafter, to grow steadily to 2038.

3.45. Sales densities for convenience goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 3.13: Torry Town Centre - Key Retail Characteristics



Key:

Market Share

10-30%

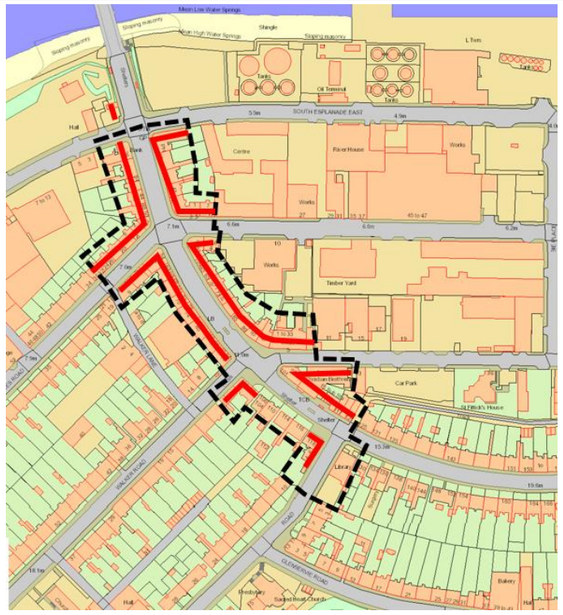
30-50%

>50%

Catchment Areas

Primary Catchment Area

Secondary Catchment Area



Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	16	1607	1044		7.64	898	584		3.00	95	62		0.23	2600	1690		10.87
Retail Services	26													1806			
Vacant	14													839			
ALL RETAIL GOODS AND SERVICES	**56**	**1607**	**1044**		**£7.64m**	**898**	**584**		**£3.00m**	**95**	**62**		**£0.23m**	**5245**			**£10.87m**

Recent Changes

Year	Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
	No. of Units					
2004	13	17	18	7	55	£11.02m
2013	8	14	32	7	61	£6.55m
2018	8	10	25	4	47	
2023	7	9	26	14	56	£10.87m
					change 2013-23	+66%
					change 2004-23	-1%

Vitality and Viability Summary

The 2023 survey identified average levels of satisfaction for comparison goods shopping (despite limited provision) which contrasts with the position identified in 2013. High level of satisfaction with ease of access by public transport and to combine with business. Below average satisfaction with combining with leisure, and travel by car.

Strengths: Public transport accessibility; some additional services and facilities; compact centre. Turnover has increased (despite higher vacancies) and is similar to 2004 levels.

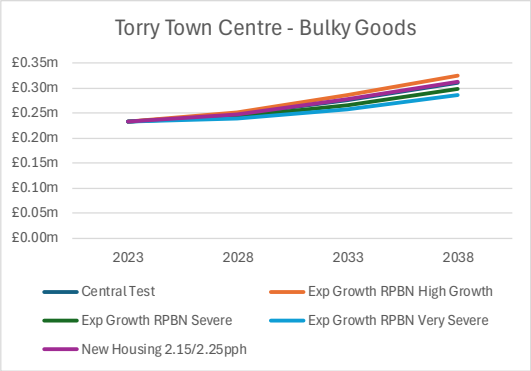
Weaknesses: Limited food retail offer (no major main food shop); limited multiples; adverse impacts of traffic on amenity; mixed environmental quality. High level of vacancies (25% by number of units and 16% by floor area) - significantly increased since 2018 and similar to that identified in 2013.

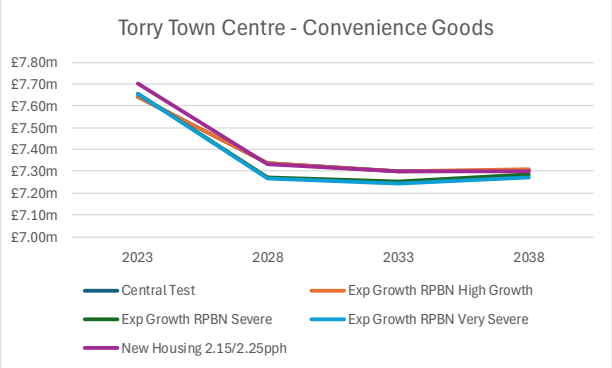
Summary: in general it is considered that Torry has below average indicators of vitality and viability but has shown some improvement since 2012.

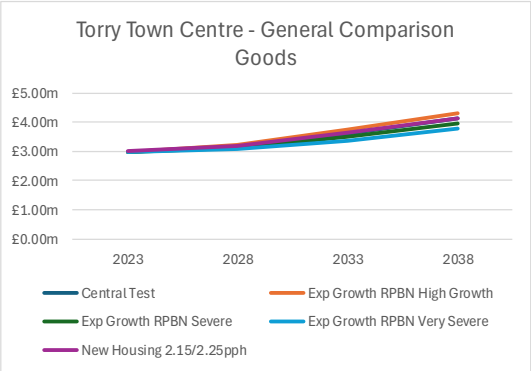
Retail Strategy Summary

Centre Classification	Town Centre
Planning Policy Approach	Protection and manage change
Proposed Retail Floorspace	
Commitments	
Proposals	

Figure 3.14: Forecast Future Turnover of Torry Town Centre



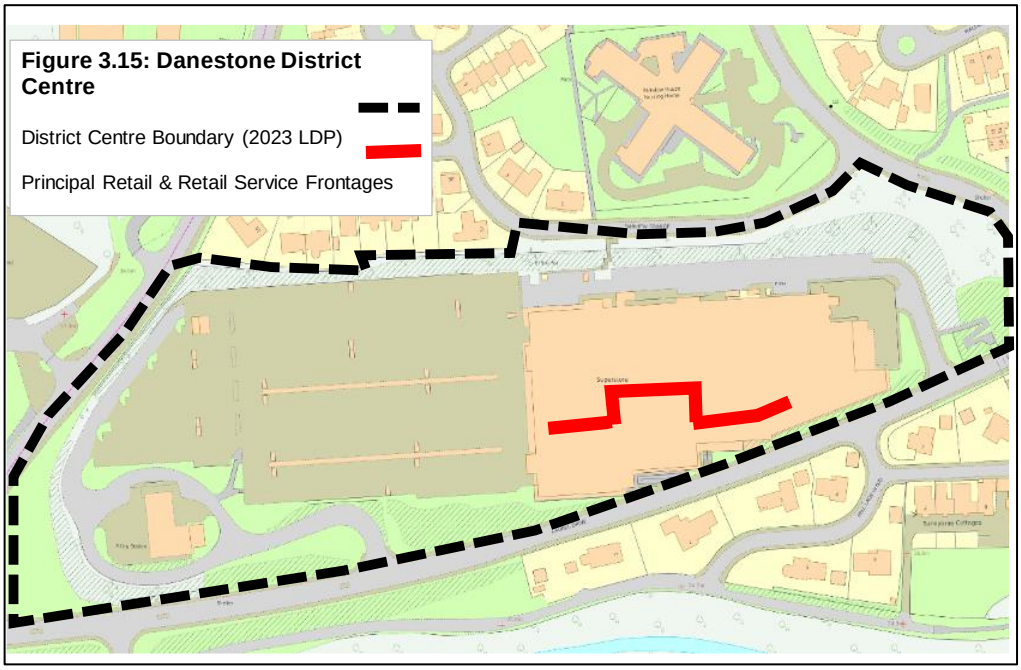




Danestone District Centre

3.46. Danestone District Centre comprises the Tesco Extra store together with a limited number of small units accessed from within the Tesco store. Figure 3.15 identifies the extent of Danestone District Centre as defined in the LDP.

Figure 3.15: Danestone District Centre



Space in Use

Numbers of Units by Type

3.47. Figure 3.16 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 3.16: Danestone District Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	1	2	2	2
Comparison	1	1	3	3
Retail, Leisure + Business Services	3	5	4	4
Vacant				
TOTAL	5	8	9	9
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	7118	6771	6771	6771
Comparison	3249	6700	6835	6835
Retail, Leisure + Business Services	280	449	311	311
Vacant				0
TOTAL	10647	13920	13917	13917

Changes Over Time

3.48. Examination of Figure 3.16 indicates minimal changes in the type of floorspace and numbers of units over time.

Vacancies

Vacancy Rates

3.49. There are no vacant units within Danestone District Centre. This is, therefore, well below the current average vacancy rate within Scotland and the UK. No vacancies have been recorded in the surveys undertaken since 2003.

Additional Facilities/Services

3.50. Danestone District centre does not provide any significant additional services or facilities.

Heritage

3.51. There are no heritage designations within or adjacent to Danestone District Centre

Household Survey Perceptions of the Town Centre

3.52. Danestone, and other district centres, were not included in the survey of attitudes in the household survey.

Vitality and Viability

3.53. The character of Danestone District Centre, with the dominance of a single superstore and limited range of additional retail goods shops and services/facilities limits the applicability of concepts of vitality and viability.

3.54. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally mixed picture of the health of the centre, taking into account its character:

- There are no vacant units.
- The retail goods offer within the centre is extensive but this is limited to the offer within a single, dominant, superstore (Tesco).
- Services and facilities within the Centre are very limited.
- The physical layout reflects that of the superstore i.e. dominated by car parking and large format retail units of limited architectural character. This limits the environmental quality of the centre.
- The centre is seen as very easy to access by private car and is served by bus routes.

Danestone District Centre: Turnover, Catchment Area and Future Growth

Turnover and Sales Densities

3.55. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the district centre as follows:

- Convenience Goods: 2 units; 6771 sq m GFA; 3329 sq m NFA (sales); and £40.46m turnover. The most significant unit is the Tesco superstore.
- General Comparison and Bulky Goods: 1 unit (but significant space in the Tesco store); 6835 sq m GFA; 3444 sqm NFA (sales); and £20.22m turnover.
- Services: 4 units; 311 sq m GFA
- Vacancies: none

3.56. The Tesco superstore dominates floorspace within the centre.

3.57. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 93% of national averages.
- General comparison goods densities are below national averages (75%).
- Bulky goods are also trading below national average levels (60%).

3.58. Caution is needed in interpreting these figures in particular because the comparison floorspace turnover is associated with sales within Tesco i.e. a predominantly convenience goods store. These sales densities are only slightly lower than average for Tesco within the UK. In this context, trading levels appear healthy. Convenience sales densities are close to levels one would expect for this type of location. However, comparison with previous studies identify that sales have reduced reflecting increased competition within the catchment area served by the superstore.

Catchment Area and Market Penetration

3.59. Figure 3.17 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Danestone District Centre and also the levels of market penetration for different goods categories. The figure also summaries other key information for the town centre in 2023 including the location of principal retail frontages within the centre. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA are both limited to the urban areas of north/north west Aberdeen. This is significant in that, in previous studies, the catchment area extended further north west into Aberdeenshire. This reduction in catchment area reflects the impact of increased provision within both Aberdeenshire and also, to an extent, at Bridge of Don RP. Market penetration levels in this area are 10-30%.
- Both General Comparison and Bulky Comparison Goods are similar to convenience goods: the centre's PCA and SCA are both limited to north and north west Aberdeen but, reflecting the more limited provision, market penetration levels for comparison goods in this area are low (<10%).

Future Changes in Retail Turnover: Danestone District Centre

3.60. Figure 3.18 sets out the future turnover of each of the principal goods categories for the District Centre for the period 2023 to 2038 for each strategic model test.

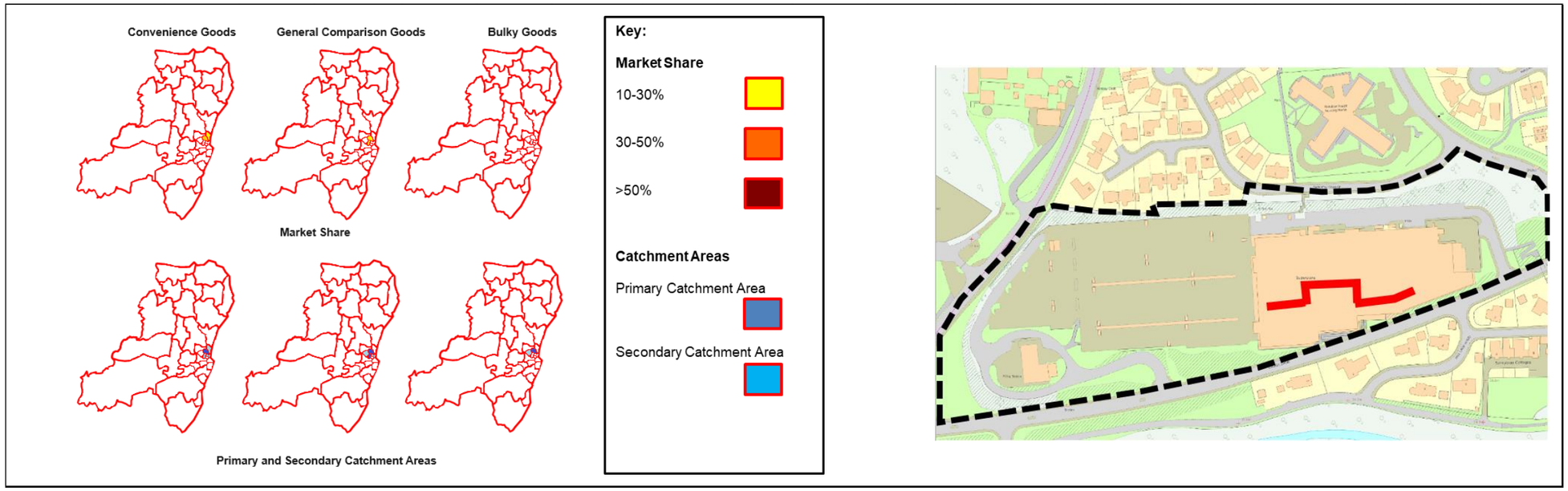
3.61. The principal forecasts are:

- Steady increase in convenience turnover to 2028 (reflecting a combination of population growth within the PCA countered by the impact of national expenditure growth forecasts) and thereafter a more rapid rate of growth.
- Significant growth for general comparison and bulky goods turnover

3.62. In overall terms turnover for the town centre is forecast to show steady growth to 2028 and on to 2038.

3.63. Sales densities for convenience goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 3.17: Danestone District Centre - Key Retail Characteristics



Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	5	6771	3402		40.46	6169	3111		19.13	666	333		1.09	13605	6846		60.68
Retail Services	4													311			
Vacant	0													0			
ALL RETAIL GOODS AND SERVICES	**9**	**6771**	**3402**		**£40.46m**	**6169**	**3111**		**£19.13m**	**666**	**333**		**£1.09m**	**13917**			**£60.68m**

Recent Changes

Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	1	1	3	0	5	£83.42m
2013	2	1	5	0	8	£85.06m
2018	2	3	4	0	9	
2023	2	3	4	0	9	£60.68m
					change 2013-23	-29%
					change 2004-23	-27%

Vitality and Viability Summary

The nature of Danestone as a District Centre, dominated by a major superstore with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:

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 shop. No survey undertaken in 2023.

Strengths: No vacancies; ease of access by private car.

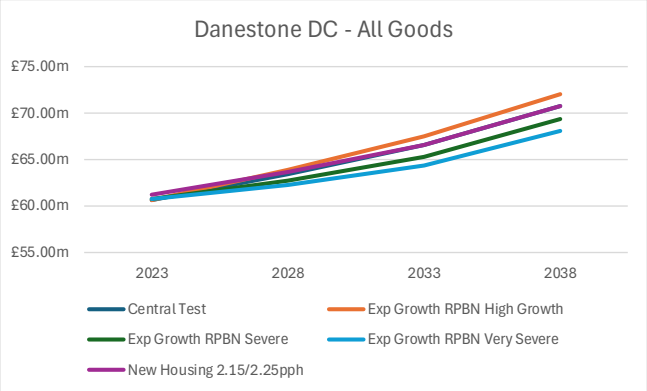
Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking. Declining sales reflecting increased competition.

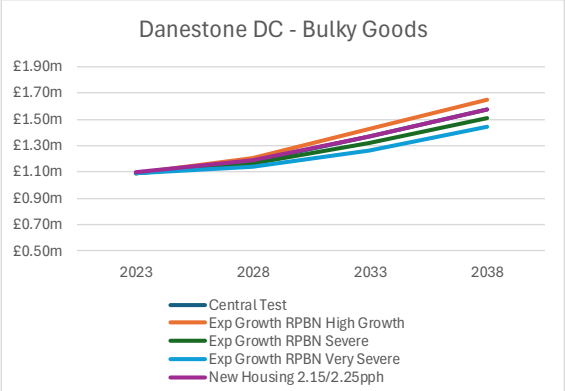
Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available. Reduction in turnover reflecting national changes and increased provision in north Aberdeen and Inverurie.

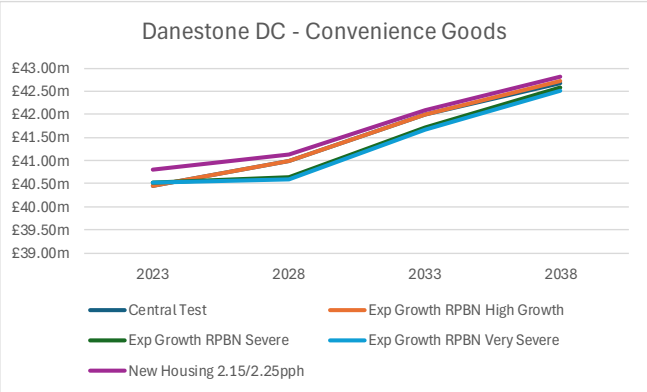
Retail Strategy Summary

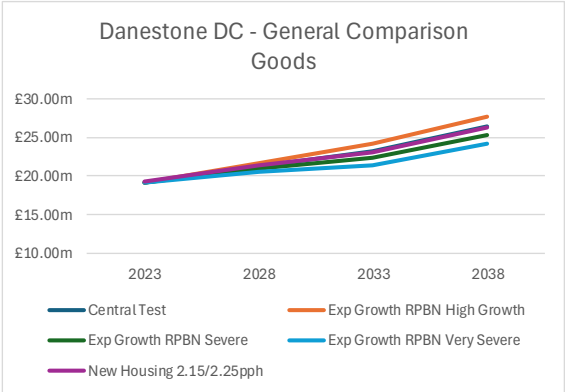
Centre Classification	District Centre
Planning Policy Approach	Protection
Proposed Retail Floorspace	Potentially affected by new District Centre proposals for north and west of Aberdeen.
Commitments	
Proposals	

Figure 3.18: Forecast Future Turnover of Danestone District Centre









Dyce District Centre

3.64. Dyce District Centre comprises the ASDA superstore together with additional units adjacent to the superstore. Figure 3.19 identifies the extent of Dyce District Centre as defined in the LDP.

Figure 3.19: Dyce District Centre

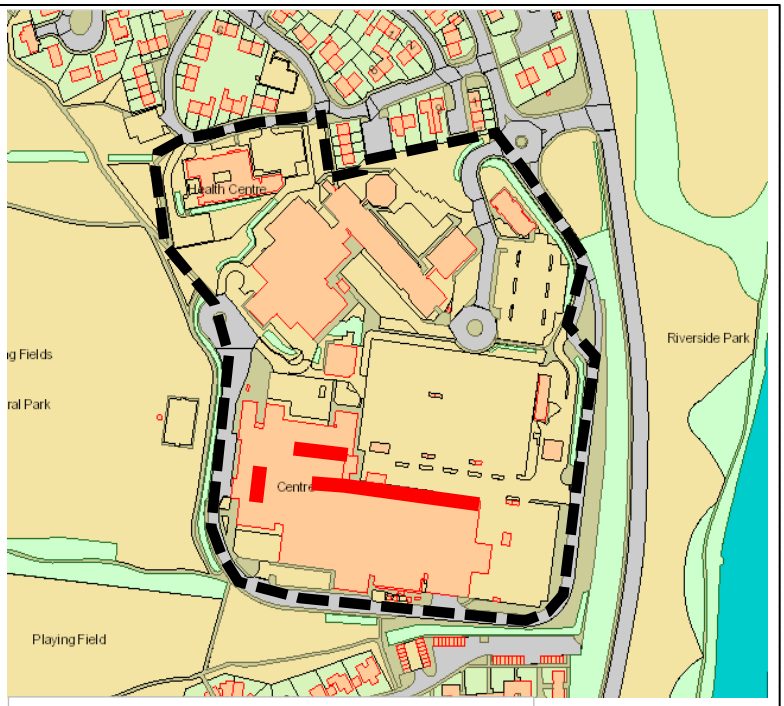


Figure 3.19: Dyce District Centre

District Centre Boundary (2023 LDP)

Principal Retail & Retail Service Frontages

Space in Use

Numbers of Units by Type

3.65. Figure 3.20 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 3.20: Dyce District Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	2	1	1	1
Comparison	9	3	3	3
Retail, Leisure + Business Services	1	5	1	4
Vacant	2	2	7	4
TOTAL	14	11	12	12
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	4627	4778	4791	4810
Comparison	2896	4730	4442	4458
Retail, Leisure + Business Services	191	373	92	375
Vacant	300	387	769	483
TOTAL	8014	10268	10094	10125

Changes Over Time

3.66. Examination of Figure 3.20 indicates that there have been limited changes in units since 2013 although there was a significant increases in vacant units to 2018 which have since reduced.

Vacancies

Vacancy Rates

3.67. Figure 3.20 also sets out information on vacancies within Dyce District Centre. In 2023/24 the vacancy rates were:

- Number of units: 33%
- Floor area: 5%

3.68. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Dyce District Centre by number of units is well above the national average but, by floorspace, it is well below the average. This reflects the dominance of the ASDA superstore which occupies a large majority of the floorspace within the centre.

Changes over Time

3.69. Figure 3.20 indicates that vacancies increased to 2018 but have since reduced to levels closer to those identified in 2003 and 2013.

Additional Facilities/Services

3.70. Dyce District Centre provides a limited range of additional services and facilities:

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

Heritage

3.71. There are no heritage designations within or adjacent to Danestone District Centre

Household Survey Perceptions of the Town Centre

3.72. Dyce, along with other district centres, was not included in the survey of attitudes in the household survey.

Vitality and Viability - Summary

3.73. The character of Dyce District Centre, with the dominance of a single superstore and limited range of additional retail goods shops and services/facilities limits the applicability of concepts of vitality and viability.

3.74. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally mixed picture of the health of the centre, taking into account its character:

- There are four vacant units, that is significantly above average by number of units but significantly below average by floorspace.
- The retail goods offer within the centre is extensive but this is limited to the offer within a single, dominant, superstore (ASDA).
- Other services and facilities within the Centre are limited.

- The physical layout reflects that of the superstore i.e. dominated by car parking and large format retail units is of limited architectural character. This limits the environmental quality of the centre.
- The centre is seen as very easy to access by private car and is served by bus routes.

Dyce District Centre: Turnover, Catchment Area and Future Growth

Turnover and Sales Densities

3.75. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the District Centre as follows:

- Convenience Goods: 1 unit; 4810 sq m GFA; 2645 sq m NFA (sales); and £32.17m turnover. The only convenience floorspace is located within the ASDA superstore.
- General Comparison and Bulky Goods: 4 units (but significant space in the ASDA store); 4458 sq m GFA; 2504 sq m NFA (sales); and £20.51m turnover.
- Services: 4 units; 375 sq m GFA
- Vacancies: 4 units; 483 sq m GFA

3.76. The ASDA superstore dominates floorspace within the centre.

3.77. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 103% of national averages.
- General comparison goods densities are below national averages (75%).
- Bulky goods are also trading below national average levels (230%).

3.78. Caution is needed in interpreting these figures in particular because the comparison floorspace turnover is associated with sales within ASDA i.e. a predominantly convenience goods store. The sales densities for convenience and general comparison are close to the average for ASDA in the UK. The bulky goods densities are high and may reflect sampling error (i.e. inclusion within the sample of those who just happen to regularly use the ASDA store).

Catchment Area and Market Penetration

3.79. Figure 3.21 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Dyce District Centre and also the levels of market penetration for different goods categories. The figure also summaries other key information for the town centre in 2023 including the location of principal retail frontages within the town centre. The figure identifies that:

- For Convenience Goods: the centre's PCA is limited to the urban areas of north west Aberdeen but the SCA extends into Aberdeenshire (Zone 15). Market penetration levels in this area are 30-50% in the PCA and 10-30% in the SCA.
- Both General Comparison and Bulky Comparison Goods are similar to convenience goods but extend more generally across north Aberdeen. Market penetration levels for comparison goods in this area are in the range of 10-30% but lower in Aberdeenshire.

Future Changes in Retail Turnover: Danestone District Centre

3.80. Figure 3.22 sets out the future turnover of each of the principal goods categories for the District Centre for the period 2023 to 2038 for each strategic model test.

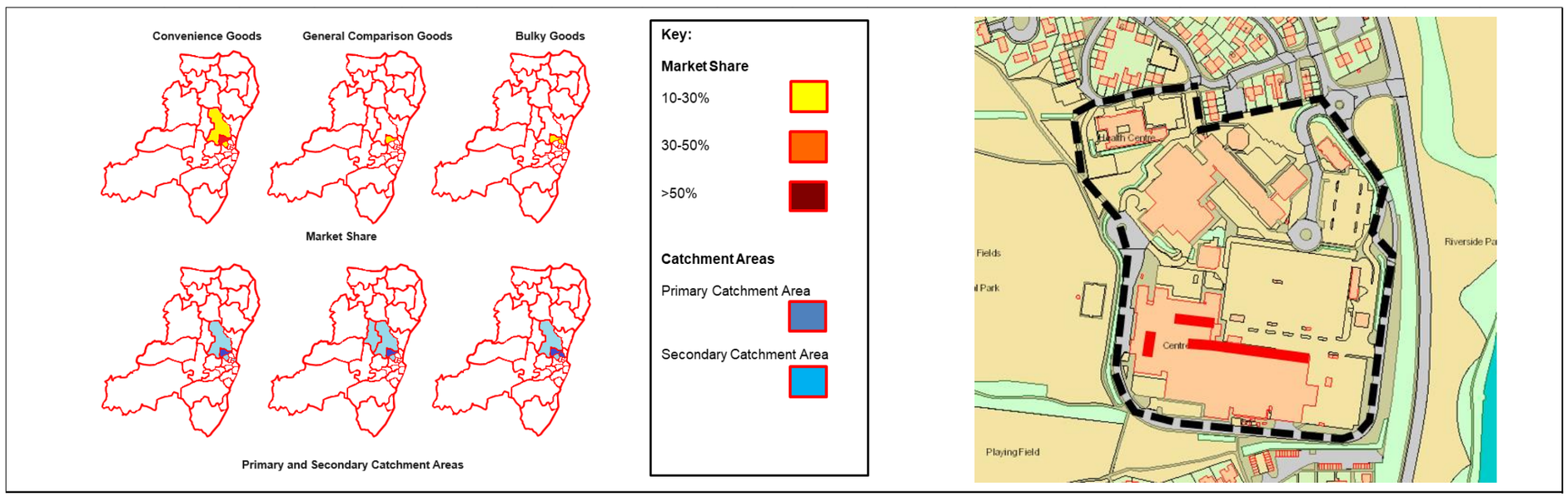
3.81. The principal forecasts are:

- Broadly flat (no change) in convenience turnover to 2038 (reflecting a combination of population growth within the PCA countered by the impact of national expenditure growth forecasts).
- Significant growth for general comparison and bulky goods turnover

3.82. In overall terms turnover for the centre is forecast to show steady growth to 2028 and on to 2038.

3.83. Sales densities for convenience goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 3.21: Dyce District Centre - Key Retail Characteristics



Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	4	4810	2645		32.17	3583	2023		12.03	874	481		8.48	9267	5149		52.68
Retail Services	4													375			
Vacant	4													483			
ALL RETAIL GOODS AND SERVICES	**12**	**4810**	**2645**		**£32.17m**	**3583**	**2023**		**£12.03m**	**874**	**481**		**£8.48m**	**10125**			**£52.68m**

Recent Changes

Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	2	9	1	2	14	£49.45m
2013	1	3	5	2	11	£54.15m
2018	1	3	1	7	12	
2023	1	3	4	4	12	£52.68m
					change 2013-23	-3%
					change 2004-23	+7%

Vitality and Viability Summary

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:

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 an attractive place to shop. No survey undertaken in 2023.

Strengths: Ease of access by private car. Centre includes some important community facilities.

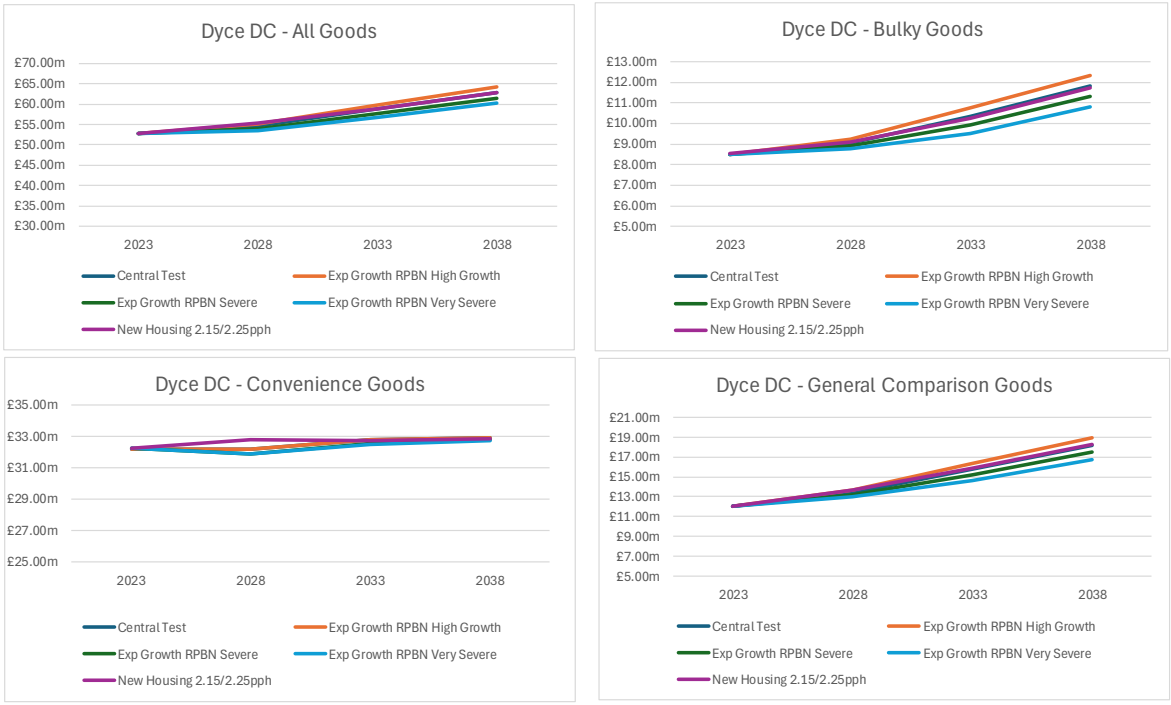
Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking; Level of vacancies reduced from high level identified in 2018 with some small units occupied, including for non-retail use.

Summary: limited applicability of indicators to this centre. Indicators of viability appear average - major superstore remains strong and vacancies in small units has reduced. Turnover has reduced reflecting national changes and competition from stores in north Aberdeen. Few occupied units and limited range of additional facilities, services and goods types available.

Retail Strategy Summary

Centre Classification	District Centre
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	Potentially affected by new District Centre proposals for north and west of Aberdeen.

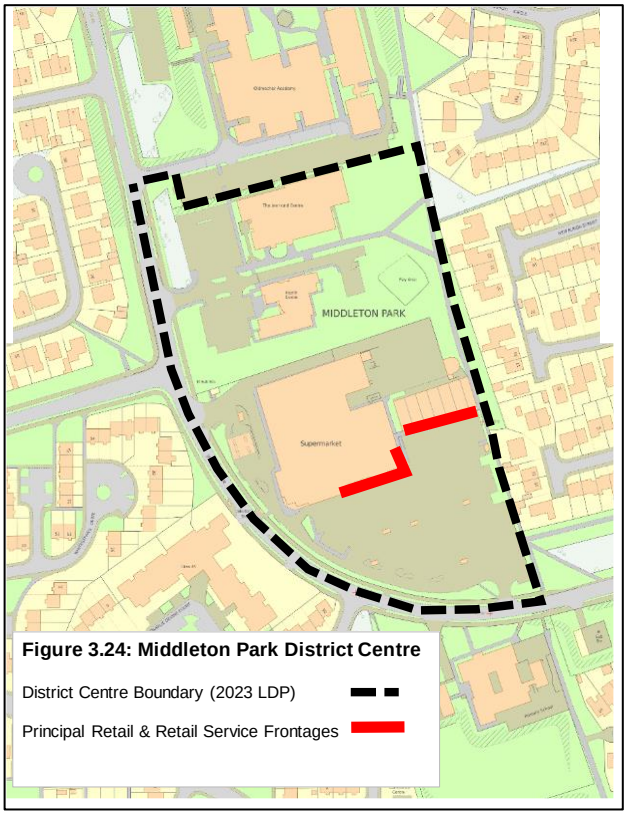
Figure 3.22: Forecast Future Turnover of Dyce District Centre



Middleton Park District Centre

3.84. Middleton Park District Centre comprises the ASDA superstore together with a parade of units adjacent to the superstore. Figure 3.23 identifies the extent of the District Centre as defined in the LDP.

Figure 3.23: Middleton Park District Centre



Space in Use

Numbers of Units by Type

3.85. Figure 3.24 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 3.24: Middleton Park District Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	1	1	1	1
Comparison	1	0	1	1
Retail, Leisure + Business Services	5	6	5	5
Vacant				
TOTAL	7	7	7	7
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	3290	3597	3617	3617
Comparison	1525	1542	1665	1665
Retail, Leisure + Business Services	575	648	533	533
Vacant	0	0	0	0
TOTAL	5390	5787	5815	5814

Changes Over Time

3.86. Examination of Figure 3.24 indicates minimal changes in the type of floorspace and numbers of units over time.

Vacancies

Vacancy Rates

3.87. There are no vacant units within Middleton Park District Centre. This is, therefore, well below the current average vacancy rate within Scotland and the UK. No vacancies have been recorded in the surveys undertaken since 2003.

Additional Facilities/Services

3.88. Middleton Park District centre provides a limited range of significant additional services or facilities:

- Dentist
- Health Centre
- Leisure/Sport Centre and Gym

Heritage

3.89. There are no heritage designations within or adjacent to Middleton Park District Centre

Household Survey Perceptions of the Town Centre

3.90. Middleton Park, and other district centres, was not included in the survey of attitudes in the household survey.

Vitality and Viability - Summary

3.91. The character of Middleton Park District Centre, with the dominance of a single superstore and limited range of additional retail goods shops and services/facilities limits the applicability of concepts of vitality and viability.

3.92. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally mixed picture of the health of the centre, taking into account its character:

- There are no vacant units.
- The retail goods offer within the centre is good but this is limited to the offer within a single, dominant, superstore (ASDA).
- Other services and facilities within the Centre are limited.
- The physical layout reflects that of the superstore i.e. dominated by car parking and large format retail units of limited architectural character. This limits the environmental quality of the centre.
- The centre is seen as very easy to access by private car and is served by bus routes.

Middleton Park District Centre: Turnover, Catchment Area and Future Growth

Turnover and Sales Densities

3.93. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the district centre as follows:

- Convenience Goods: 1 unit; 3617 sq m GFA; 1989 sq m NFA (sales); and £21.75m turnover. The most significant unit is the ASDA superstore.

- General Comparison and Bulky Goods: 1 unit (but significant space in the ASDA store); 1665 sq m GFA; 927 sqm NFA (sales); and £5.11m turnover.
- Services: 5 units; 5331 sq m GFA
- Vacancies: none

3.94. The ASDA superstore dominates floorspace within the centre.

3.95. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 93% of national averages.
- General comparison goods densities are below national averages (75%).
- Bulky goods are also trading below national average levels (60%).

3.96. Caution is needed in interpreting these figures in particular because the comparison floorspace turnover is associated with sales within ASDA i.e. a predominantly convenience goods store. These sales densities are only slightly lower than average for ASDA within the UK. In this context, trading levels appear healthy. Convenience sales densities are close to levels one would expect for this type of location. However, comparison with previous studies identify that sales have reduced reflecting increased competition within the catchment area served by the superstore.

Catchment Area and Market Penetration

3.97. Figure 3.25 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Middleton Park District Centre and also the levels of market penetration for different goods categories. The figure also summaries other key information for the centre in 2023 including the location of principal retail frontages within the town centre. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA are both limited to the urban areas of north Aberdeen. Within this catchment area there has been increased competition, notably from M&S at Bridge of Don. Market penetration levels in this area are 10-30%.
- Both General Comparison and Bulky Comparison Goods are similar to convenience goods : the centre's PCA and SCA are both limited to north Aberdeen but, reflecting the more limited provision, market penetration levels for comparison goods in this area are low (<10%).

Future Changes in Retail Turnover: Middleton Park District Centre

3.98. Figure 3.26 sets out the future turnover of each of the principal goods categories for the District Centre for the period 2023 to 2038 for each strategic model test.

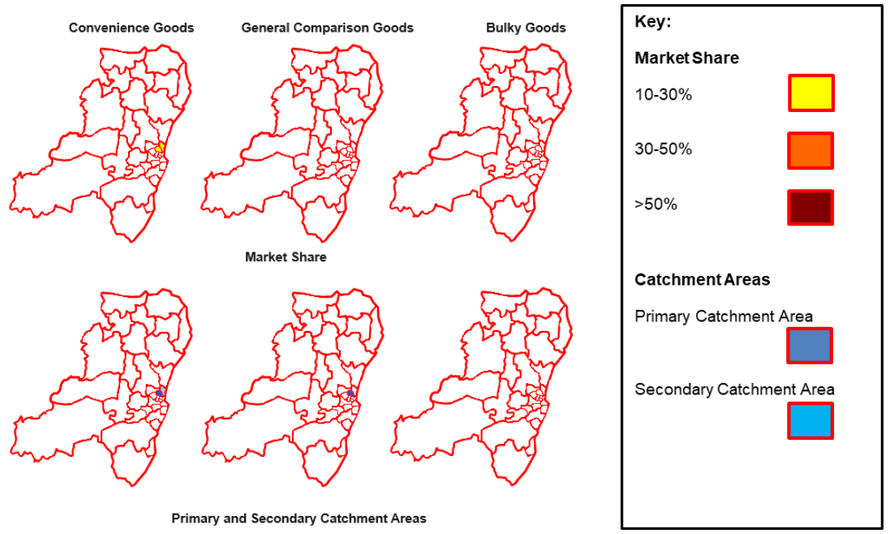
3.99. The principal forecasts are:

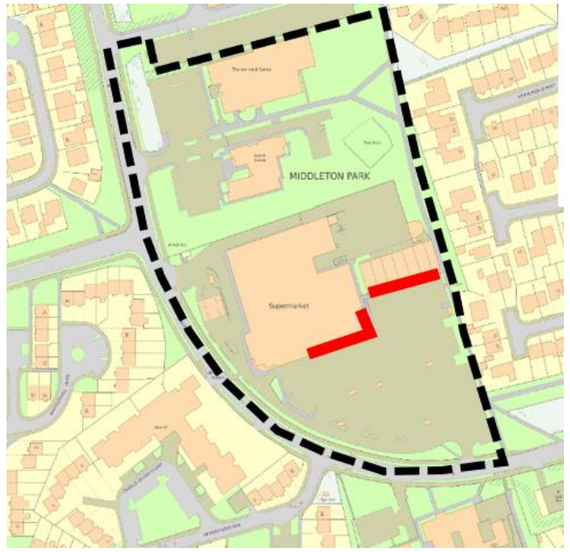
- Slow growth for convenience goods to 2028 and, thereafter, significant growth, primarily related to population increases in the catchment area.
- Slight drop in general comparison turnover to 2028 with growth thereafter. The centre does not include any significant bulky goods retail floorspace.

3.100. In overall terms turnover for the town centre is forecast to slight decline to 2028 with steady growth thereafter to 2038.

3.101. Sales densities for convenience and comparison goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 3.25: Middleton Park District Centre - Key Retail Characteristics





Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	2	3617	1989		21.75	1665	927		5.11					5282	2916		26.86
Retail Services	5													533			
Vacant	0													0			
ALL RETAIL GOODS AND SERVICES	**7**	**3617**	**1989**		**£21.75m**	**1665**	**927**		**£5.11m**				**£0.00m**	**5814**			**£26.86m**

Recent Changes

Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	1	1	5	0	7	£28.72m
2013	1	0	6	0	7	£31.36m
2018	1	1	5	0	7	
2023	1	1	5	0	7	£26.86m
					change 2013-23	-14%
					change 2004-23	-6%

Vitality and Viability Summary

The nature of Middleton Park as a District Centre, dominated by a major supermarket with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:

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. No survey undertaken in 2023.

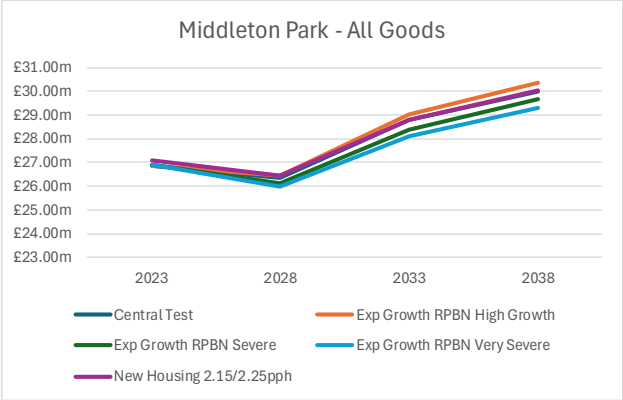
Strengths: No vacant units; ease of access by private car; provides some important local facilities and services. Slight decline in turnover reflecting increased competition in north Aberdeen.
Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking.

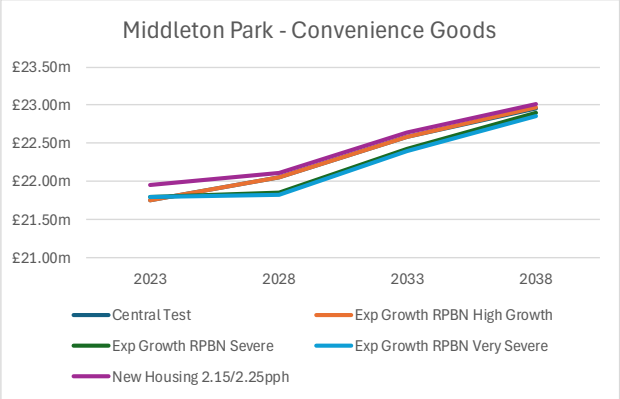
Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.

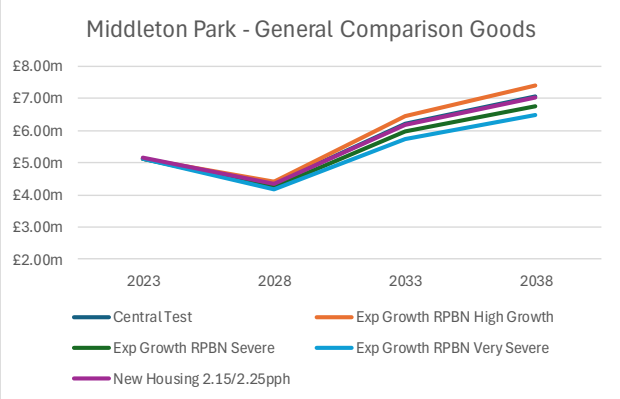
Retail Strategy Summary

Centre Classification	District Centre
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	Potentially affected by new District Centre proposals for north and west of Aberdeen.

Figure 3.26: Forecast Future Turnover of Middleton Park District Centre



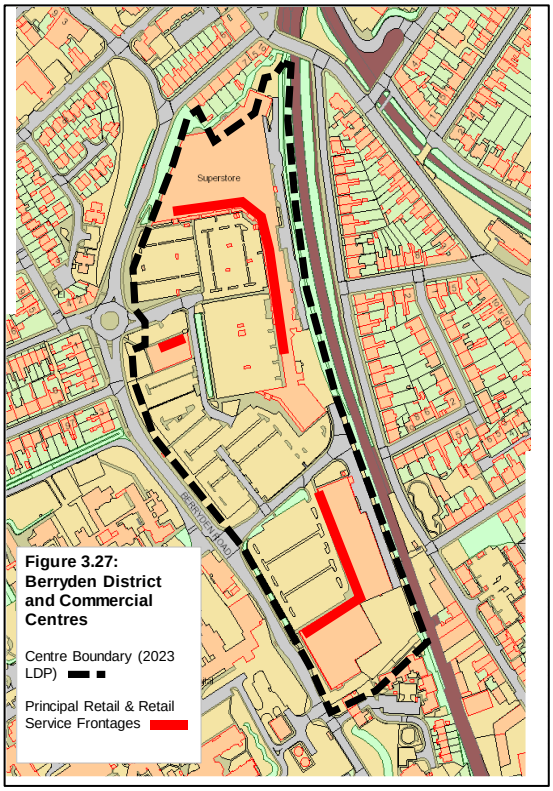




Berryden District Centre

3.102. Berryden District Centre comprises the whole of the northern (upper) and southern (lower) parts of Berryden including both the Sainsbury superstore and a series of large format units together within a limited number of smaller units close to Sainsbury. Figure 3.27 identifies the extent of Berryden District Centre as defined in the LDP.

Figure 3.27: Berryden District Centre



Space in Use

Numbers of Units by Type

3.103. Figure 3.28 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 3.28: Berryden District Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	1	1	1	2
Comparison	7	10	8	8
Retail, Leisure + Business Services	2	3	3	6
Vacant	1	1	5	2
TOTAL	11	15	17	18
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	6540	5092	5092	7164
Comparison	8237	16660	15183	16733
Retail, Leisure + Business Services	288	1862	356	1202
Vacant	151	1299	4651	850
TOTAL	15216	24913	25282	25949

Changes Over Time

3.104. The principal change in floorspace and numbers of units identified in Figure 3.28 reflects the recent redefinition of the centre to include Lower Berryden (since the 2018 surveys, but the 2018 data includes both parts of Berryden). In addition the figure shows a significant increase in vacant units in 2018 which has subsequently reduced but, most recently, has been an increase in retail service units.

Vacancies

Vacancy Rates

3.105. Figure 3.28 also sets out information on vacancies within Berryden District Centre. In 2023/24 the vacancy rates were:

- Number of units: 11%
- Floor area: 3%

3.106. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Berryden District Centre by number of units is slightly below above the national average but, by floorspace, it is well below the average. This reflects that the two vacant units are smaller than the remainder of units within the centre.

Changes over Time

3.107. Figure 3.20 indicates that vacancies increased to 2018 but have since reduced to levels close to those identified in 2003 and 2013.

Additional Facilities/Services

3.108. There are no significant additional services and facilities within Berryden apart from the identified retail and service units.

Heritage

3.109. There are no heritage designations within Berryden District Centre but the centre is located adjacent to Rosemount and Westburn Conservation Area and there is one listed building to the north of the centre at 55 Powis Terrace.

Household Survey Perceptions of the Town Centre

3.110. Berryden, and other district centres, was not included in the survey of attitudes in the household survey.

Vitality and Viability - Summary

3.111. The character of Berryden District Centre, with the dominance large format retail units (and leisure unit) and a more limited range of additional retail goods shops and services/facilities limits the applicability of concepts of vitality and viability.

3.112. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally mixed picture of the health of the centre, taking into account its character:

- There are two units vacant. This is close to average by number of units but significantly below average by floorspace.
- The retail goods offer within the centre is extensive and includes a range of larger format units for both convenience and comparison goods but choice, in terms of operator, is limited. There are a limited number of small format units.
- Other services and facilities within the Centre are limited.

- The physical layout reflects that of the superstore/retail park format of layout i.e. dominated by car parking with limited quality pedestrian links through the centre. This limits the environmental quality of the centre.
- The centre is seen as very easy to access by private car and is served by bus routes.

Berryden District Centre: Turnover, Catchment Area and Future Growth

Turnover and Sales Densities

3.113. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the district centre as follows:

- Convenience Goods: 2 units; 7614 sq m GFA; 4687 sq m NFA (sales); and £39.39m turnover. The most significant unit is the Sainsbury superstore.
- General Comparison and Bulky Goods: 8 units (but significant space is also provided in the Sainsbury store); 16733 sq m GFA; 11902 sqm NFA (sales); and £75.11m turnover.
- Services: 6 units; 1202 sq m GFA
- Vacancies: 2 units; 850 sq m GFA

3.114. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 72% of national averages.
- General comparison goods densities are at national averages (100%).
- Bulky goods are also trading above national average levels (147%).

Catchment Area and Market Penetration

3.115. Figure 3.29 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Berryden Centre and also the levels of market penetration for different goods categories. The figure also summaries other key information for the District Centre in 2023 including the location of principal retail frontages. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA are limited to the central and western areas of the city. Within the urban context this is a relatively wide catchment and, reflecting this, market penetration rates are relatively low (typically <10%) reflecting competition from a range of other superstores and convenience floorspace.
- For general comparison goods the catchment area is primarily focussed on the local area i.e. Zone 27 but, for bulky goods, the centre draws trade from a wide area. Although the PCA comprises Zone 28 the secondary catchment for bulky goods extends across much of the City. Furthermore the household survey also identified significant trade directed to Berryden from parts of Aberdeenshire, particularly from the rural west/south west.

Future Changes in Retail Turnover: Berryden District Centre

3.116. Figure 3.30 sets out the future turnover of each of the principal goods categories for the district centre for the period 2023 to 2038 for each strategic model test.

3.117. The principal forecasts are:

- Decline in convenience goods turnover to 2028 and, thereafter, continued decline but at a slower rate. This reflects a slight reduction in population in the catchment area served by the centre combined within only marginal expenditure growth per capita.
- Significant growth in expenditure for both general comparison and bulky goods to 2028 and continuing, at a faster rate, to 2038. This is primarily driven by expenditure growth per capita but the wider catchment will also exhibit population growth.

3.118. In overall terms turnover for the town centre is forecast to minimal growth to 2028 but significant growth thereafter.

3.119. Sales densities for convenience and comparison goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 3.29: Berryden District Centre - Key Retail Characteristics

Floorspace and Turnover 2023																
		Convenience				General Comparison				Bulky Goods				All Goods			
	No.	GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover	
		Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m
Total Retail Goods Floorspace	10	7164	4687		39.39	12444	8824		40.51	4290	3078		34.59	23897	16589		114.50
Retail Services	6													1202			
Vacant	2													850			
ALL RETAIL GOODS AND SERVICES	**18**	**7164**	**4687**		**£39.39m**	**12444**	**8824**		**£40.51m**	**4290**	**3078**		**£34.59m**	**25949**			**£114.50m**

Recent Changes

Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 prices
2004	1	7	2	1	11	£84.26m
2013	1	10	3	1	15	£119.28m
2018	1	8	3	5	17	
2023	2	8	6	2	18	£114.50m
					change 2013-2	-4%
					change 2004-2	+36%

Vitality and Viability Summary

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. Surveys were not undertaken in 2023.

Strengths: Ease of access by private car; high proportion of multiples.

Vacancies have returned to close to national average (11%) by number but well below average by floorspace (3%) in 2028 having been above average in 2018.

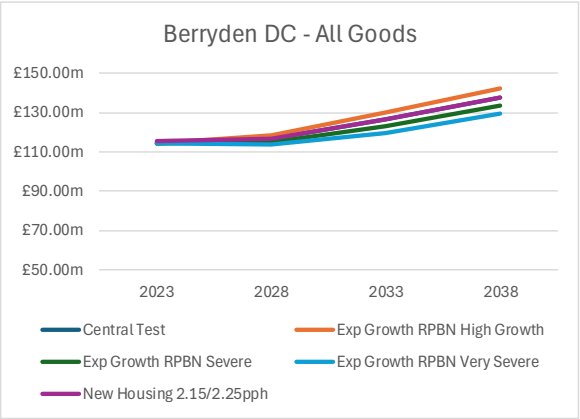
Weaknesses: Despite significant increase in range with new occupiers there remains limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking; poor access for pedestrians between supermarket and retail warehouse units.

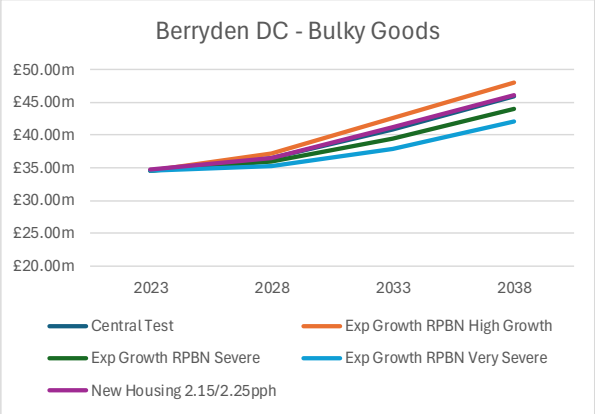
Summary: limited applicability of indicators to this centre. Indicators of viability now appear relatively strong due to occupation of major units in Lower Berryden however a weakness is the small number of units that limits the range of facilities, services and goods types available.

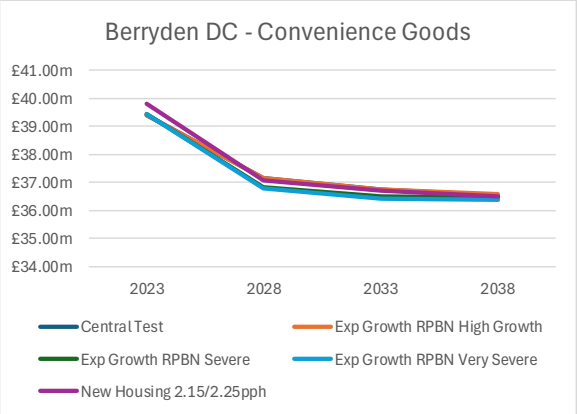
Retail Strategy Summary

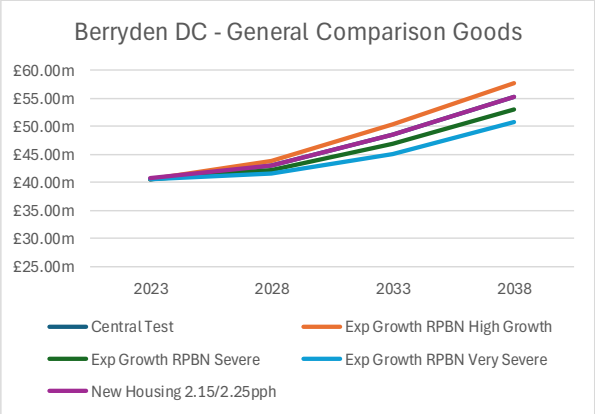
Centre Classification	District Centre (2023 LDP) No further changes recommended
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	

Figure 3.30: Forecast Future Turnover of Berryden District Centre





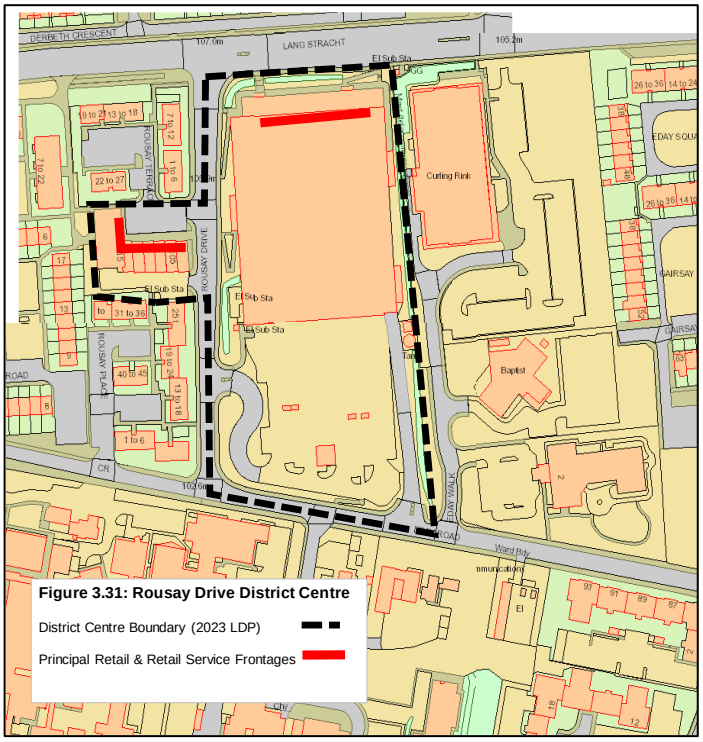




Rousay Drive District Centre

3.120. Rousay Drive District Centre comprises the Tesco superstore on the south side of the Langstracht together with a parade of smaller units located on the west side of Rousay Drive. Figure 3.31 identifies the extent of the District Centre as defined in the LDP.

Figure 3.31: Rousay Drive District Centre



Space in Use

Numbers of Units by Type

3.121. Figure 3.32 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2013 to 2023. Floorspace is dominated by the Tesco superstore.

Figure 3.32: Rousay Drive District Centre– Types of Use 2013-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience		4	2	3
Comparison				
Retail, Leisure + Business Services		5	5	5
Vacant		1	1	
TOTAL		10	8	8
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience		4217	4052	4052
Comparison		2612	2408	2408
Retail, Leisure + Business Services		365	365	365
Vacant			0	0
TOTAL		7194	6825	6825

Changes Over Time

3.122. The surveys indicate minimal changes in numbers of units and floorspace since 2013.

Vacancies

Vacancy Rates

3.123. There are no vacant units with Rousay Drive. Previously a single small unit has been identified as vacant in 2013 and 2018.

Additional Facilities/Services

3.124. Rousay Drive does not provide any additional facilities and services for the community (although a Baptist Church and Curling Rink are located immediately to the east of Tesco).

Heritage

3.125. There are no heritage designations within, or close to, Rousay Drive District Centre.

Household Survey Perceptions of the Town Centre

3.126. Rousay Drive, and other district centres, was not included in the survey of attitudes in the household survey.

Vitality and Viability - Summary

3.127. The character of Rousay Drive District Centre, with the dominance of a single superstore and limited range of additional retail goods shops and services/facilities limits the applicability of concepts of vitality and viability.

3.128. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally mixed picture of the health of the centre, taking into account its character:

- There are no vacant units.
- The retail goods offer within the centre is extensive but this is limited to the offer within a single, dominant, superstore (Tesco).
- Other services and facilities within the Centre are limited.
- There is no clear integration between the superstore and the smaller parade of units on Rousay Drive. Both parts are dominated by the private car which limits the environmental quality of the centre.
- The centre is seen as very easy to access by private car and is served by bus routes.

Rousay Drive District Centre: Turnover, Catchment Area and Future Growth

Turnover and Sales Densities

3.129. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the district centre as follows:

- Convenience Goods: 2 units; 4052 sq m GFA; 2634 sq m NFA (sales); and £37.24m turnover. The most significant unit is the Tesco superstore.
- General Comparison and Bulky Goods: no units but significant floorspace for general comparison goods included in the Tesco superstore: 2408 sq m GFA, 1565 sq m NFA and £19.45m turnover.
- Services: 5 units; 365 sq m GFA
- Vacancies: no units

3.130. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 113% of national averages.
- General comparison goods densities are at national averages (96%).
- Bulky goods are also trading above national average levels (171%).

3.131. Although only limited weight can be given to these notional averages, the figures indicate that Rousay Drive is trading at relatively high levels.

Catchment Area and Market Penetration

3.132. Figure 3.33 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Rousay Drive District Centre and also the levels of market penetration for different goods categories. The figure also summaries other key information for the district centre in 2023 including the location of principal retail frontages within the centre. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA are limited to the western areas of the city. Within these areas market penetration rates are between 10% and 30%.
- For General Comparison the catchment area is similarly primarily focussed on the local area and western parts of the City (primarily Zone 29N) with similar market penetration levels of 10-30%. The District Centre does not contain any significant bulky goods floorspace.

Future Changes in Retail Turnover: Rousay Drive District Centre

3.133. Figure 3.34 sets out the future turnover of each of the principal goods categories for the district centre for the period 2023 to 2038 for each strategic model test.

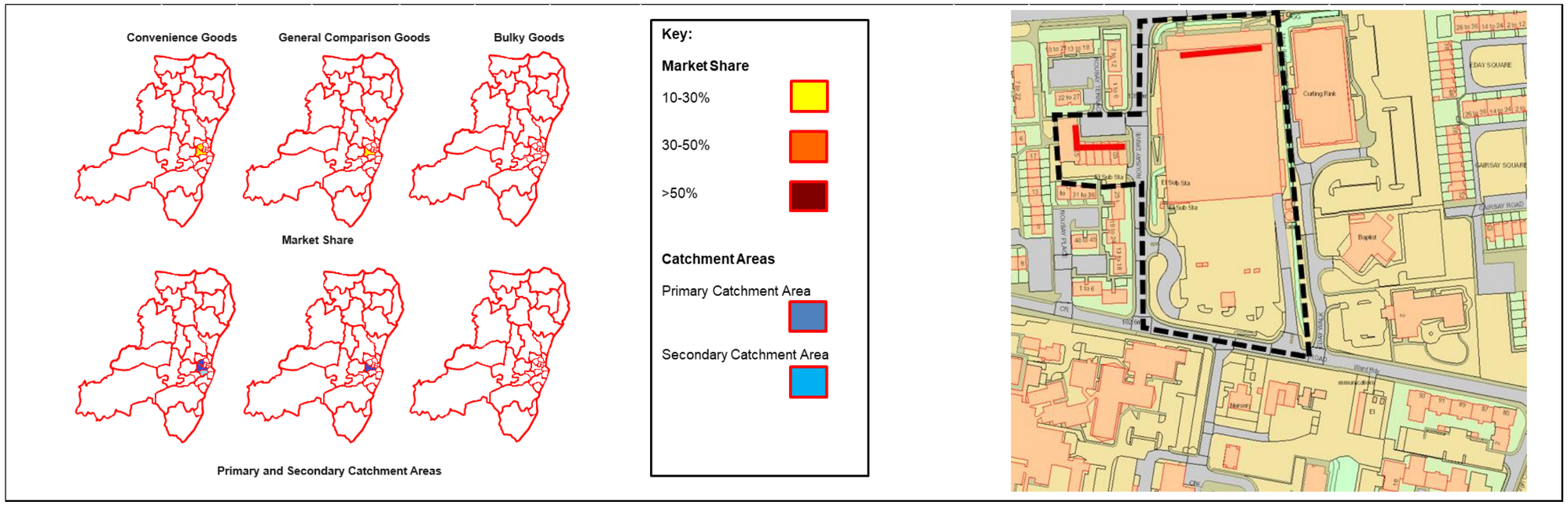
3.134. The principal forecasts are:

- Decline in convenience goods turnover to 2028 and, thereafter, marginal growth which reflects longer term population growth within the catchment area served by the centre.
- Significant growth in expenditure for general comparison goods to 2028 and continuing, at a faster rate, to 2038. This is primarily driven by expenditure growth per capita but the wider catchment will also exhibit population growth.

3.135. In overall terms turnover for the town centre is forecast to marginal decline to 2028 (reflecting the importance of convenience goods retail within the centre) but significant growth thereafter.

3.136. Sales densities for convenience and comparison goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 3.33: Rousay Drive District Centre - Key Retail Characteristics



Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	3	4052	2634		37.24	2408	1565		19.45					6460	4199		56.69
Retail Services	5													365			
Vacant														0			
ALL RETAIL GOODS AND SERVICE	**9**	**4052**	**2634**		**£37.24m**	**2408**	**1565**		**£19.45m**				**£0.00m**	**6825**			**£56.69m**

Recent Changes

Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2013	4	0	5	0	9	£41.51m
2018	2	0	5	1	8	£46.92m
2023	3	0	5	1	9	£56.69m
					change 2013-23	+37%

Vitality and Viability Summary

The nature of Rousay Drive as a District Centre, dominated by a major supermarket with limited provision through smaller units makes it difficult to apply the concepts of vitality and viability:

Strengths: One small vacant unit; ease of access by private car.

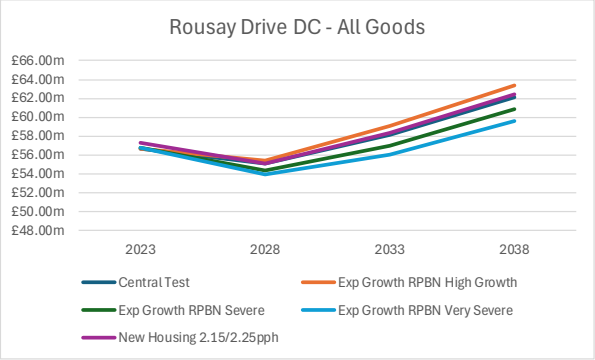
Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited integration between Tesco and small parade of independent shops.

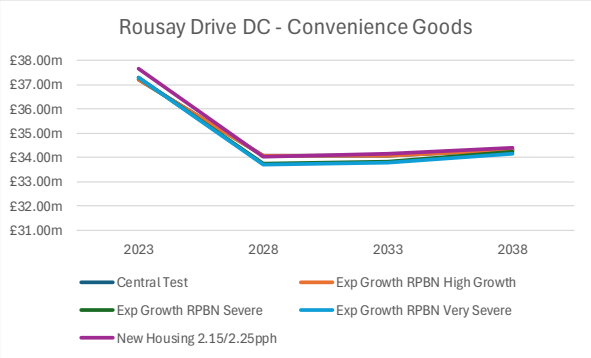
Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.

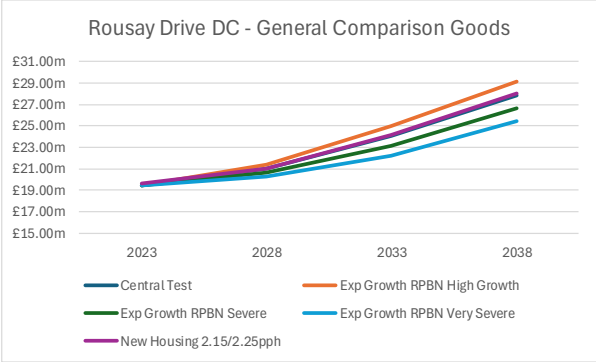
Retail Strategy Summary

Centre Classification	District Centre
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	

Figure 3.34: Forecast Future Turnover of Rousay Drive District Centre







Commercial Centres

3.137. The following sections set out key information for the five Commercial Centres identified in the adopted Aberdeen City LDP: Garthdee; Kittybrewster; Links Road/Boulevard; Denmore Road; and Bridge of Don Retail Park. . The following information is provided for each centre:

- Location plan;
- Summary numbers of units and floorspace between 2004 and 2023; and
- Summary of the key retail characteristics including catchment areas and market penetration.

Garthdee Commercial Centre

Figure 3.35: Garthdee Commercial Centre- Location Plan

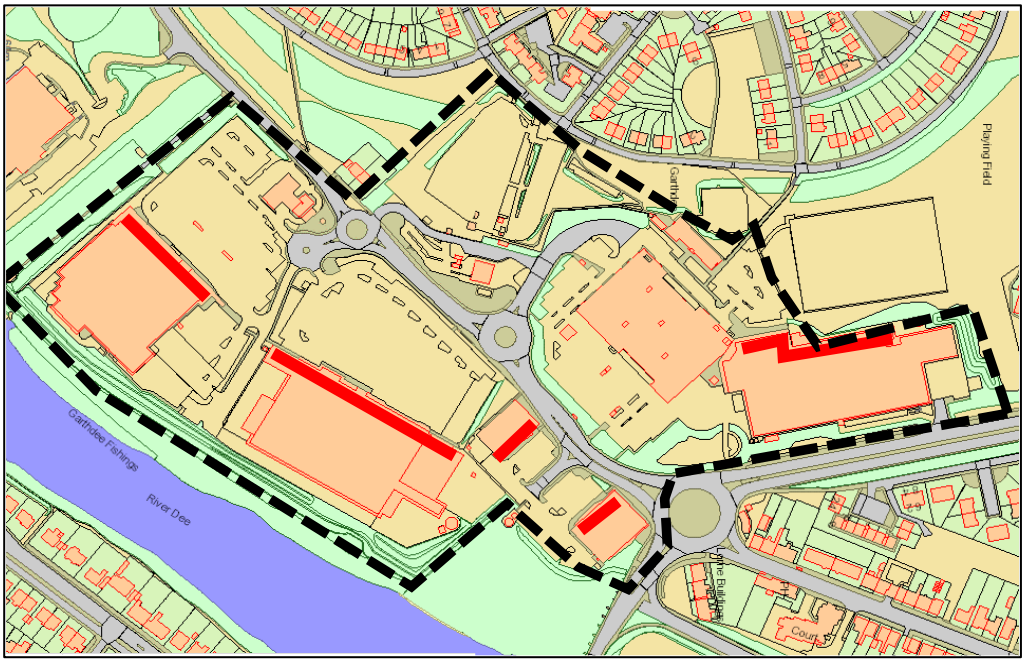
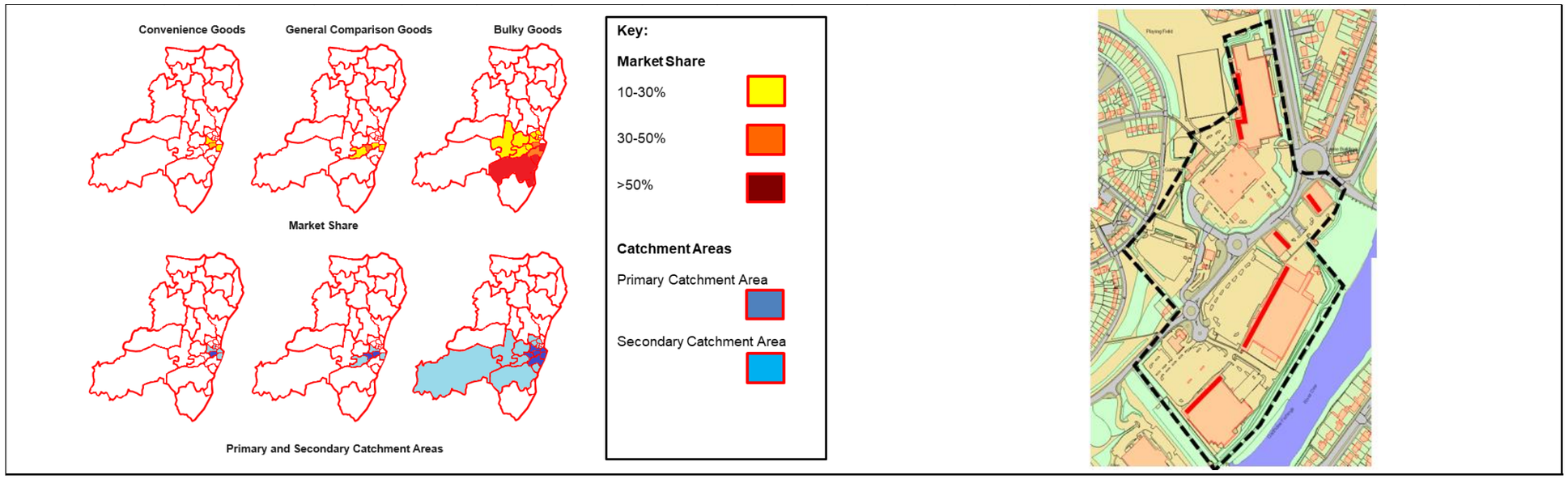


Figure 3.36: Garthdee Commercial Centre – Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	2	2	2	2
Comparison	3	3	3	3
Retail, Leisure + Business Services				
Vacant				
TOTAL	5	5	5	5
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	10542	10164	10325	10325
Comparison	17623	24728	27400	27400
Retail, Leisure + Business Services		0	0	0
Vacant		0	0	0
TOTAL	28165	34892	37725	37725

Figure 3.37: Garthdee Commercial Centre - Key Retail Characteristics



Floorspace and Turnover 2023																
		Convenience				General Comparison				Bulky Goods				All Goods			
	No.	GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover	
		Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m
Total Retail GoodsFloorspace	5	10325	5911		69.69	12130	6967		38.82	15270	11880		53.05	37725	24758		161.55
Retail Services	0													0			
Vacant	0													0			
ALL RETAIL GOODS AND SERVICES	**5**	**10325**	**5911**		**£69.69m**	**12130**	**6967**		**£38.82m**	**15270**	**11880**		**£53.05m**	**37725**			**£161.55m**

Recent Changes

Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	2	3	0	0	5	£184.54m
2013	2	3	0	0	5	£172.87m
2018	2	3	0	0	5	
2023	2	3	0	0	5	£161.55m
					change 2013-23	-7%
					change 2004-23	-12%

Vitality and Viability Summary

The nature of Garthdee as a retail location with only a small number of major retail units renders it difficult to apply the concepts of vitality and viability:

The 2012 survey identified good to very good levels of satisfaction for food shopping and average satisfaction for comparison goods. High levels of satisfaction for ease of access to the centre. Overall average levels of satisfaction for Boulevard RP as an attractive place to shop. No survey undertaken in 2023.

Strengths: no vacancies in 2023; all units are national multiples; ease of access by private car.

No vacancies throughout the period 2004-2023.

Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; no independents; environment dominated by car parking; poor access for pedestrians between supermarket and retail warehouse units. Steady decline in turnover reflecting increased competition (esp from Banchory)

Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.

Retail Strategy Summary

Centre Classification	Commercial Centre
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	

Kittybrewster Commercial Centre

Figure 3.38: Kittybrewster Commercial Centre - Location Plan

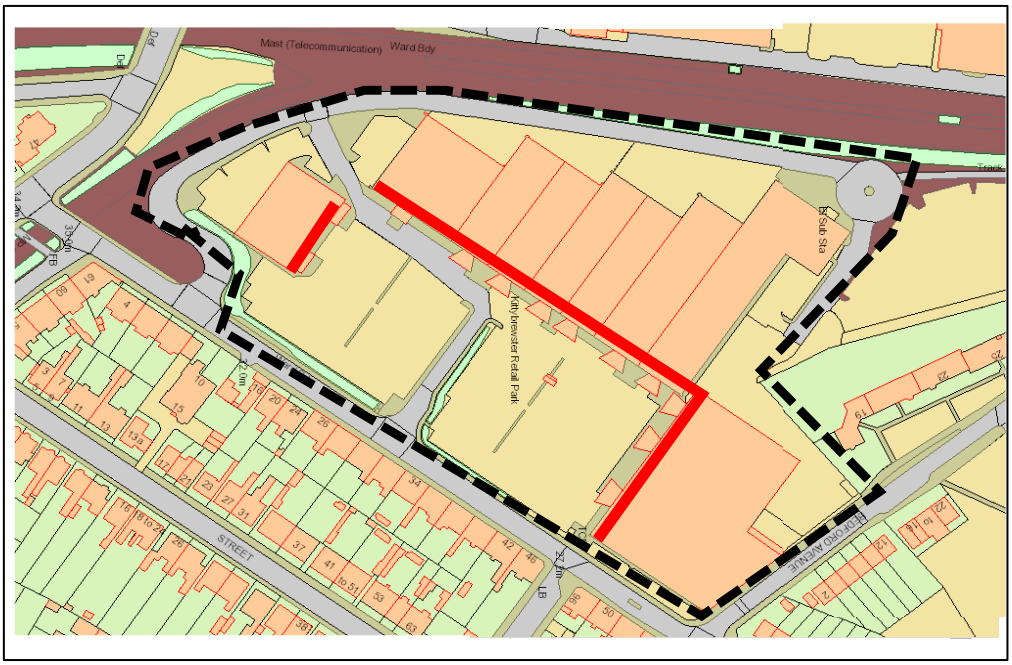
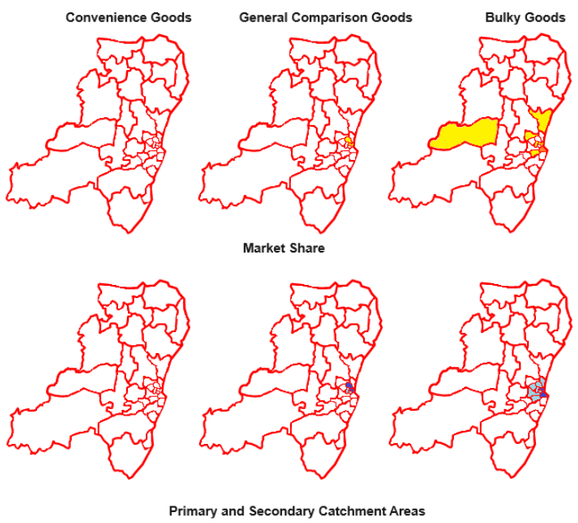


Figure 3.39: Kittybrewster Commercial Centre – Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience				
Comparison	12	12	10	11
Retail, Leisure + Business Services				
Vacant		1	1	2
TOTAL	12	13	11	13
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	0	0	0	681
Comparison	13445	16071	15409	16969
Retail, Leisure + Business Services	0	0		2025
Vacant	0	973	1553	0
TOTAL	13445	17044	16962	19674

Figure 3.40: Kittybrewster Commercial Centre - Key Retail Characteristics



Key:

Market Share

10-30%

30-50%

>50%

Catchment Areas

Primary Catchment Area

Secondary Catchment Area

Floorspace and Turnover 2023																
		Convenience				General Comparison				Bulky Goods				All Goods			
	No.	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
Total Retail Goods Floorspace	11	681	544		1.12	3162	2152		8.07	13807	11046		25.43	17650	14120		34.63
Retail Services	2													2025			
Vacant																	
ALL RETAIL GOODS AND SERVICES	**13**	**681**	**544**		**£1.12m**	**3162**	**2152**		**£8.07m**	**13807**	**11046**		**£25.43m**	**19674**			**£34.63m**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	0	12	0	0	12	£31.57m
2018	0	10	0	1	11	
2023	0	11	2	0	13	£34.63m
					change 2004-23	+10%
					change 2013-23	+20%

Vitality and Viability Summary

The nature of Kittybrewster as a retail park, comprising a series of retail warehouse units, with no provision through smaller units, makes it difficult to apply the concepts of vitality and viability:

The 2012 survey identified average levels of satisfaction for comparison goods shopping and high levels of satisfaction for ease of access to the retail park. Overall average levels of satisfaction for Kittybrewster RP as an attractive place to shop. No survey undertaken in 2023.

Strengths: No vacancies (low vacancies throughout 2004-2023); ease of access by private car; high proportion of multiples.

Weaknesses: Limited retail offer reflecting retail park nature of development (although this has diversified in recent years); limited range of additional services and facilities; limited independents; environment dominated by car parking.

Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available. Turnover increases in part reflect significant increase in general comparison retail floorspace compared to bulky goods.

Retail Strategy Summary

Centre Classification	Commercial Centre (Retail Park)
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	

Links Road/Boulevard Retail Park Commercial Centre

Figure 3.41: Links Road/Boulevard Retail Park Commercial Centre- Location Plan

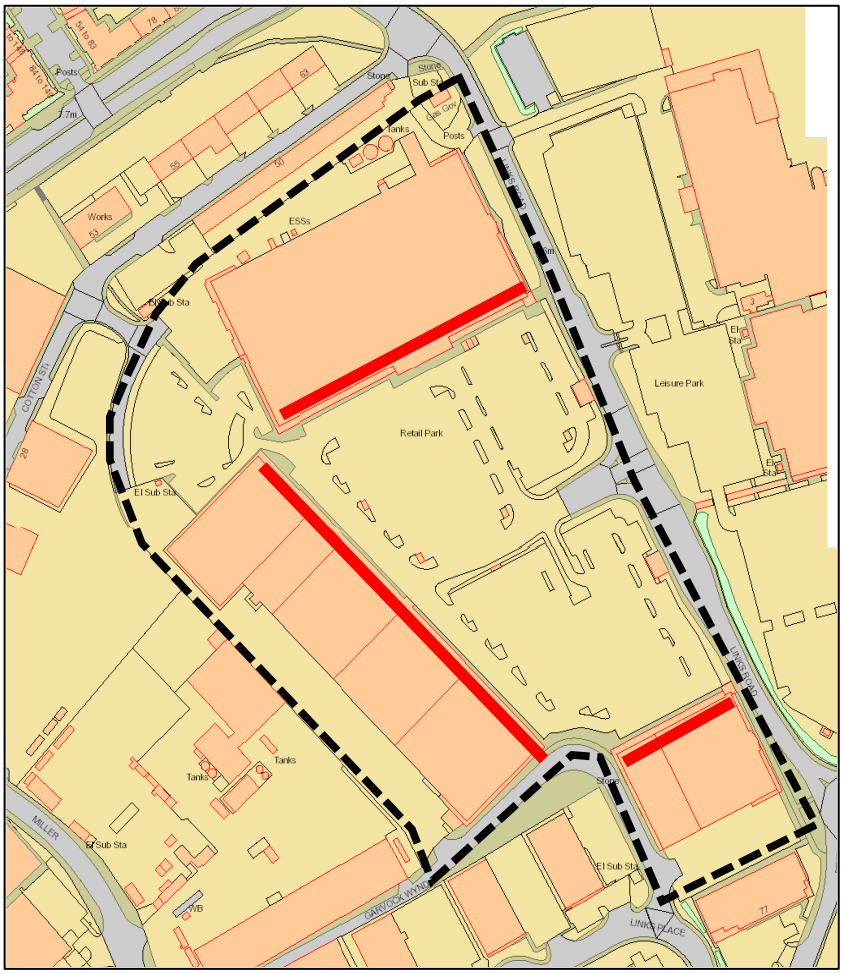


Figure 3.42: Links Road/Boulevard Retail Park Commercial centre – Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience		2	3	3
Comparison	20	7	7	6
Retail, Leisure + Business Services			2	1
Vacant		3	2	2
TOTAL	20	12	14	12
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience		7175	7234	7433
Comparison	19141	15469	15298	13432
Retail, Leisure + Business Services	0	0	0	208
Vacant	0	0	1350	930
TOTAL	19141	22644	23882	22004

Figure 3.43: Links Road/Boulevard Retail Park Commercial Centre - Key Retail Characteristics

Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	9	7433	4457		41.25	7800	5159		31.13	5632	4039		14.75	20866	13536		87.13
Retail Services	1													208			
Vacant	2													930			
ALL RETAIL GOODS AND SERVICES	**12**	**7433**	**4457**		**£41.25m**	**7800**	**5159**		**£31.13m**	**5632**	**4039**		**£14.75m**	**22004**			**£87.13m**

Recent Changes

Year	Conv	Comp	No. of Units Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 prices
2004	0	20			20	£29.42m
2013	2	7	0	3	12	£81.44m
2018	3	7	2	2	14	
2023	3	6	1	2	12	£87.13m
					change 2013-23	+7%
					change 2004-23	+196%

Vitality and Viability Summary

The nature of Boulevard as a retail park, dominated by a major superstore and retail warehouse units, with no provision through smaller units makes it difficult to apply the concepts of vitality and viability:

The 2012 survey 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. Overall above average levels of satisfaction for Boulevard RP as an attractive place to shop. Survey not undertaken in 2023.

Strengths: ease of access by private car; high proportion of multiples.

Two vacancies in 2023 - 14% by number of units and 4% by floor area

Weaknesses: Limited retail offer reflecting small number of retail units; limited range of additional services and facilities; limited independents; environment dominated by car parking; poor access for pedestrians between supermarket and retail warehouse units.

Summary: limited applicability of indicators to this centre. Indicators of viability appear relatively strong. The principal weakness is the small number of units that limits the range of facilities, services and goods types available.

Retail Strategy Summary

Centre Classification	Commercial Centre (Retail Park)
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	

Denmore Road Commercial Centre

3.138. The Denmore Road area is identified in the in the APG – Hierarchy of Centres as a Commercial Centre although its boundary is limited to site OP75 which is identified as part of the Commercial Centre and as a site for Bulky Goods retailing in the LDP. Additional retail and related units in the Denmore Road area are identified in Figure 3.44.

Figure 3.44: Denmore Commercial Centre - Location Plan

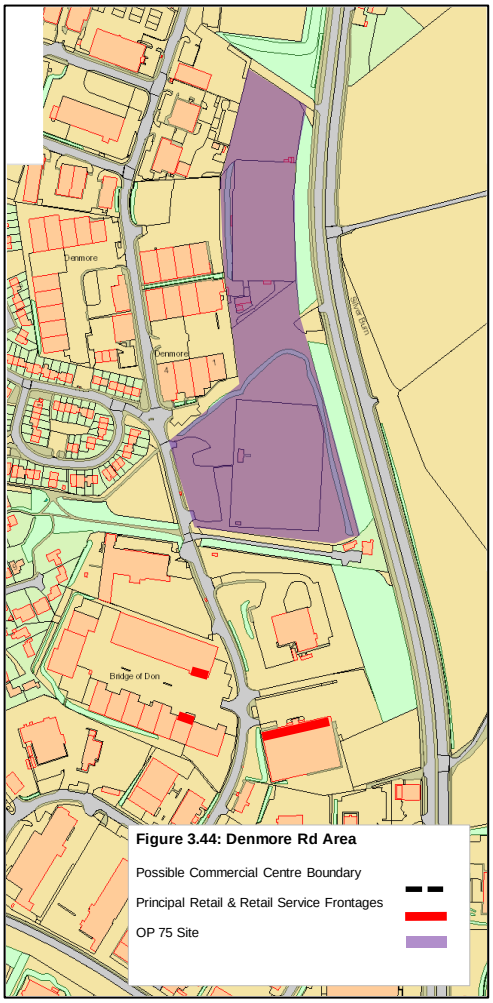
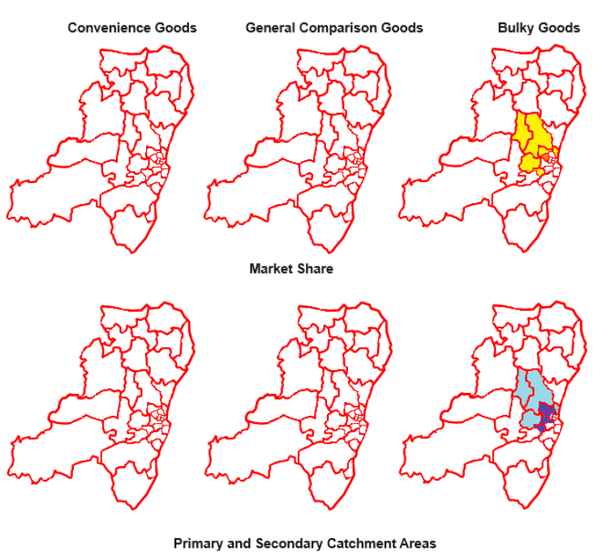


Figure 3.45: Denmore Road – Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience		2	3	3
Comparison	20	7	7	6
Retail, Leisure + Business Services			2	1
Vacant		3	2	2
TOTAL	20	12	14	12
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience		7175	7234	7433
Comparison	19141	15469	15298	13432
Retail, Leisure + Business Services	0	0	0	208
Vacant	0	0	1350	930
TOTAL	19141	22644	23882	22004

Figure 3.46: Denmore Road Commercial Centre - Key Retail Characteristics



Key:

Market Share

10-30%

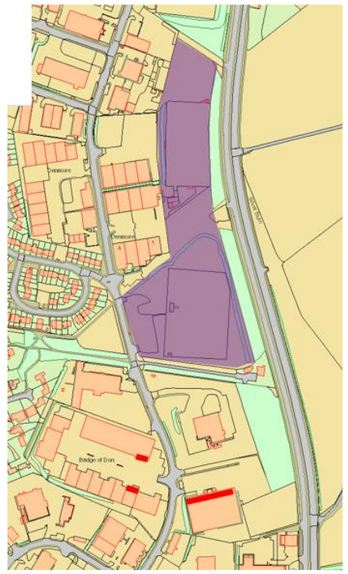
30-50%

>50%

Catchment Areas

Primary Catchment Area

Secondary Catchment Area



Floorspace and Turnover 2023																
		Convenience				General Comparison				Bulky Goods				All Goods			
	No.	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
Total Retail Goods Floorspace	3									11235	8755		20.81	11235	8755		20.81
Retail Services	1													153			
Vacant																	
ALL RETAIL GOODS AND SERVICES	**4**									**11235**	**8755**		**£22.81m**	**11388**			**£20.81m**

Recent Changes						
Year	No. of Units					Retail Goods Turnover £m 2021 Prices
	Conv	Comp	Ret Services	Vacant	Total	
2018	1	4	1	0	6	
2023	0	*3*	1	0	4	£20.81m

Vitality and Viability Summary

The Denmore Road area comprices existing bulky goods retail units plus OP75 identified as opportunity for new Commercial Centre (Bulky Goods only).

Retail Strategy Summary

Centre Classification	Bridge of Don retail park - Commercial Centre OP75 - opportunity for new Commercial Centre (Bulky Goods)
Planning Policy Approach	Protection
Proposed Retail Floorspace ***Commitments*** ***Proposals***	

Bridge of Don Retail Park Commercial Centre

Figure 3.47: Bridge of Don Retail Park Commercial Centre - Location Plan

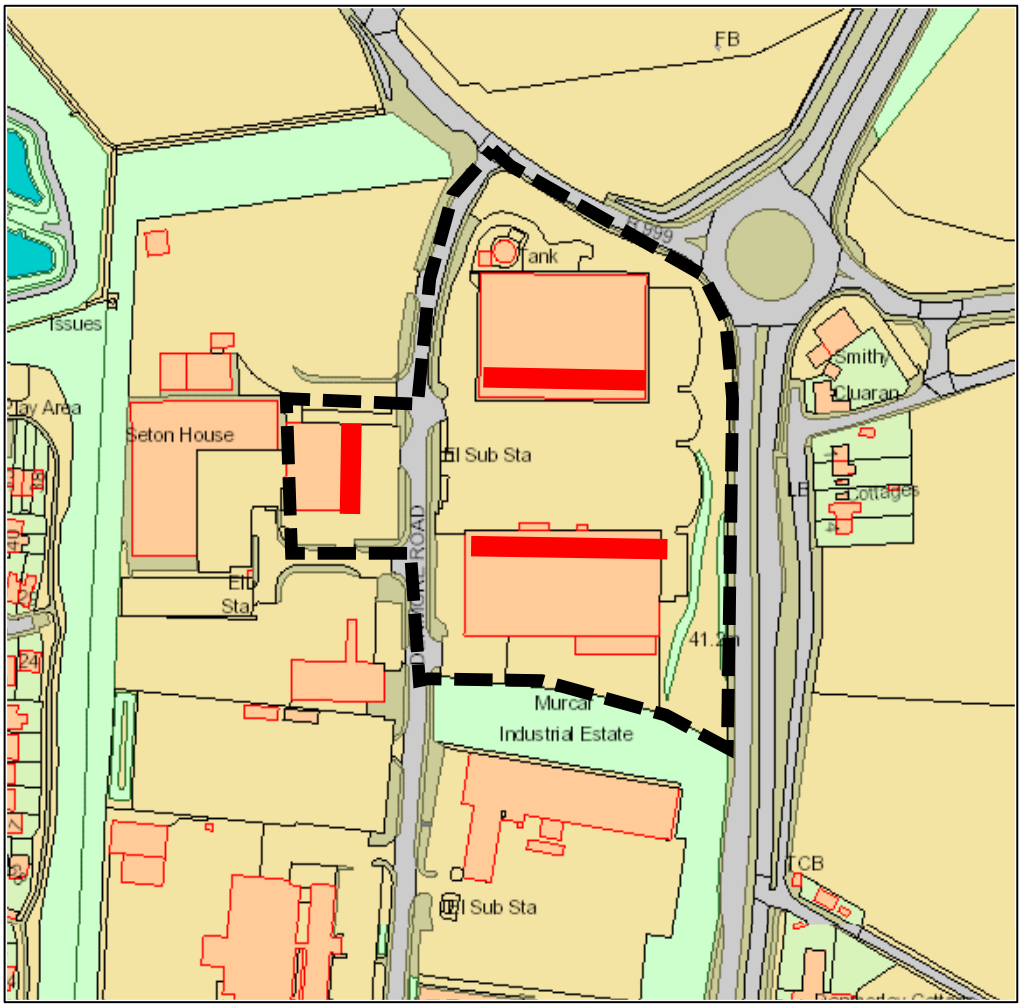
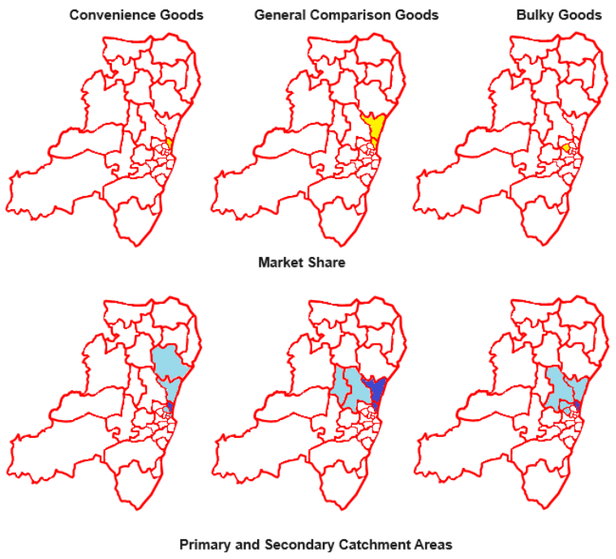


Figure 3.48: Bridge of Don Retail Park – Types of Use 2018-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience			1	1
Comparison			4	3
Retail, Leisure + Business Services			1	1
Vacant				1
TOTAL	0	0	6	6
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience			1801	1731
Comparison			8518	2760
Retail, Leisure + Business Services			168	168
Vacant				1532
TOTAL	0	0	10487	6193

Figure 3.49: Bridge of Don Retail Park Commercial Centre - Key Retail Characteristics



Key:

Market Share

10-30%

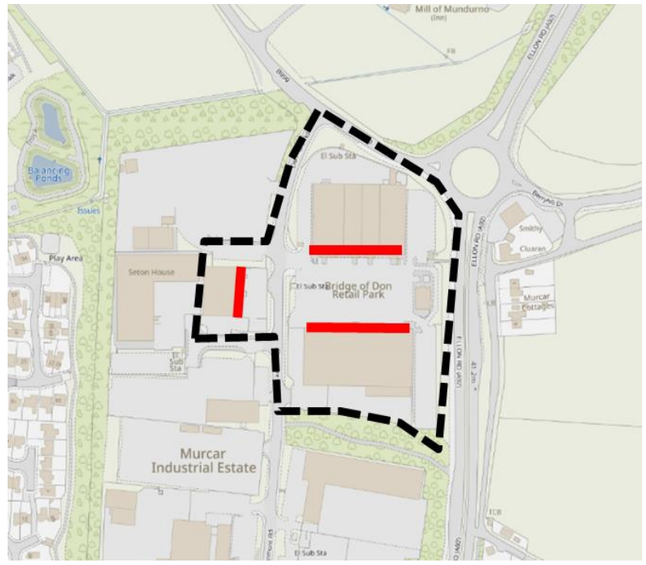
30-50%

>50%

Catchment Areas

Primary Catchment Area

Secondary Catchment Area



Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	4	1731	1150		7.91	990	743		5.72	1770	1328		4.91	4492	3221		18.54
Retail Services	1													168			
Vacant	1													1532			
ALL RETAIL GOODS AND SERVICES	**6**	**1731**	**1150**		**£7.92m**	**990**	**743**		**£5.72m**	**1770**	**1328**		**£5.38m**	**6193**			**£18.54m**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2018	1	4	1	0	6	
2023	1	3	1	1	6	£18.54m

Vitality and Viability Summary

The Bridge of Don RP comprises limited range of large format retail warehouse units including both general comparison and convenience shopping. Location identified to include older unit on W side of Denmore Road (currently vacant). Concepts of vitality and viability are difficulty to apply to this location.

Retail Strategy Summary

Centre Classification	Bridge of Don Retail Park - Commercial Centre
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	

4. Aberdeenshire – Principal Town Centres

Overview

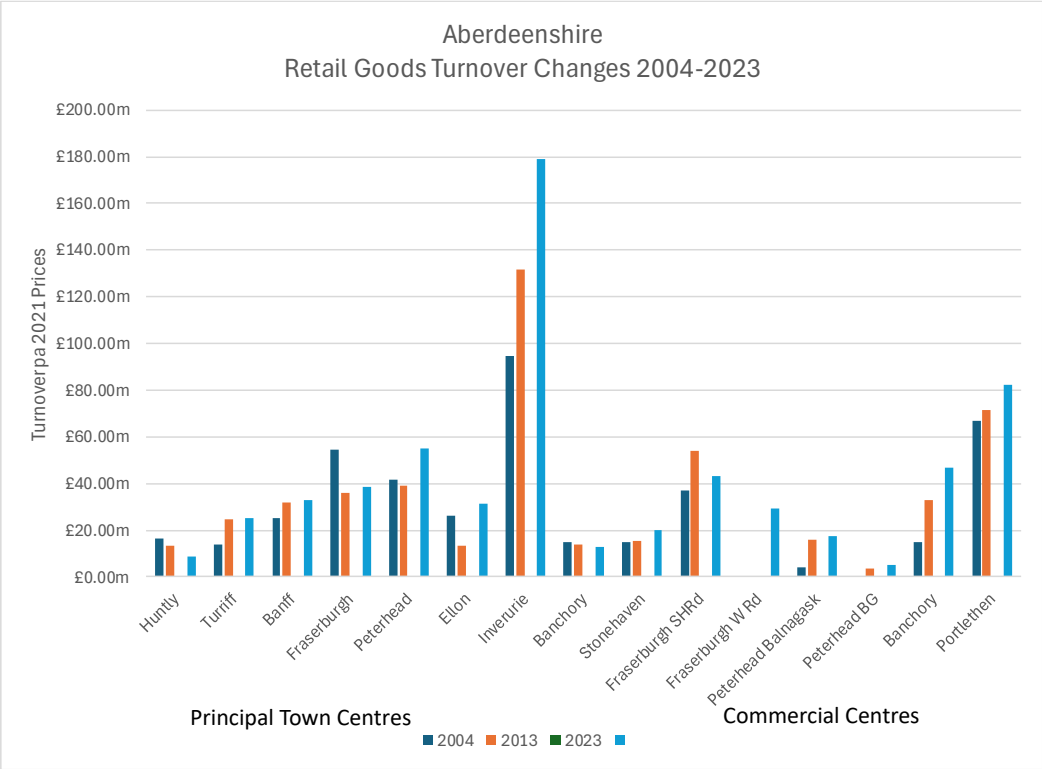
4.1. This section provides a similar review of the Principal Town Centres, selected Other Town Centres and Commercial Centres[6] as identified in the Aberdeenshire LDP 2023. Figures 4.1 and 4.2 provide an overview of changes across these centres since 2003. The "Other Town Centres" included in the reviews are Westhill and Portlethen reflecting the fact that these are significantly larger than others in the "Other Town Centre" category.

4.2. Figure 3.1 shows that, whereas some centres have experienced significant floorspace increases since 2003 (most notably Inverurie but also Peterhead and Portlethen), others have seen a reduction in floorspace, including Huntly and Fraserburgh. Figure 4.2 presents similar information but for centres' turnover (in 2021 prices). This shows a similar pattern of change except that most centres have increased turnover in real terms and those that have declined are limited to Huntly, Fraserburgh and, marginally, Banchory. In each of these three cases there has been significant out-of-centre floorspace developed in the form of large supermarkets or superstores that have directly impacted on centre turnover.

[6] The retail park of Portlethen is included in these tables only – it is noted that the retail park is included within the defined Portlethen town centre identified as an "Other Town Centre" in the LDP network of centres.

Figure 4.1: Changes in Floorspace – Aberdeenshire Centres 2004-2023

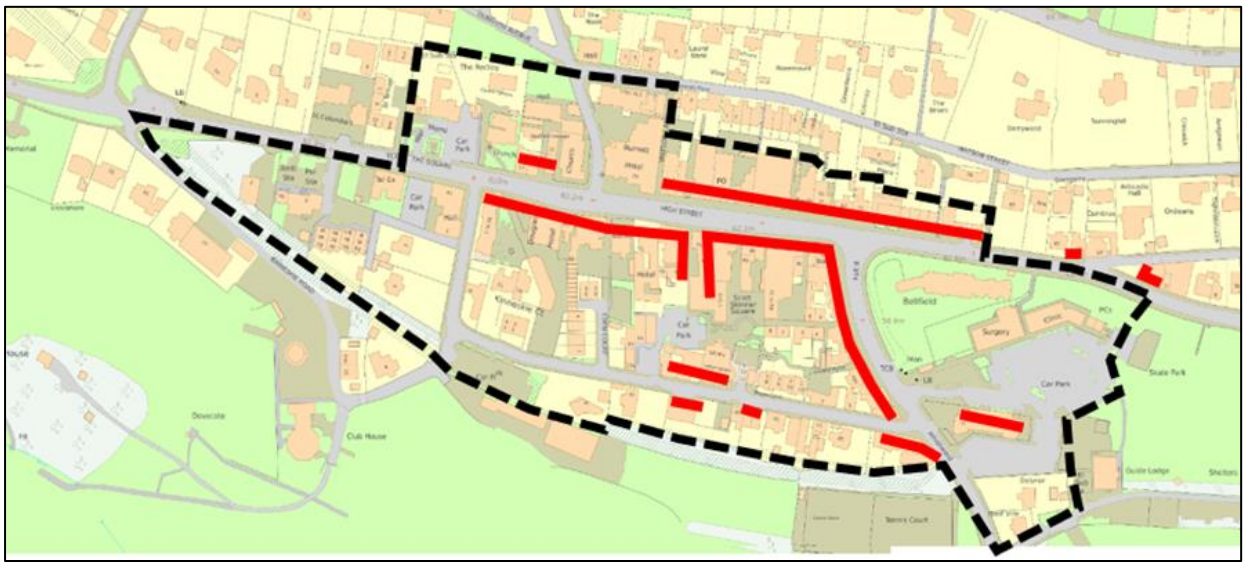
Figure 4.2: Changes in Retail Turnover – Aberdeenshire Centres 2004-2023 (2021 Prices)



Banchory Town Centre

4.3. Figure 4.3 identifies the extent of Banchory town centre as defined in the LDP.

Figure 4.3: Banchory Town Centre



Space in Use

Numbers of Units by Type

4.4. Figure 4.4 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 20223.

Figure 4.4: Banchory Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	7	7		7
Comparison	31	34		29
Retail, Leisure + Business Services	23	28		35
Vacant	0	2		9
TOTAL	61	71		80
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	877	1339		531
Comparison	4370	4508		4472
Retail, Leisure + Business Services	2157	2552		2945
Vacant	0	179		809
TOTAL	7404	8578		8757

Changes Over Time

4.5. Examination of Figure 4.4 indicates some trends in changes in provision since 2004 including an increase in numbers of services units (which is, in part, explained through new definitions adopted in Goad surveys) and a higher estimate of floorspace in 2013. Between 2013 and 2023 there has been a reduction in convenience floorspace with a commensurate increase in services space. Vacancies have also increased significantly between 2013 and 2023 and are, currently, at levels much higher than previously recorded.

Vacancies

Vacancy Rates

4.6. Figure 4.4 also sets out information on vacancies within Banchory town centre. In 2023/24 the vacancy rates were:

- Number of units: 11%
- Floor area: 9%

4.7. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Banchory town centre's vacancy rate is slightly below the UK average by both number and area of vacant units.

Changes over Time

4.8. Figure 4.4 indicates that vacancies have increased significantly from 2013 and are at the highest level recorded in the retail studies of the town.

Additional Facilities/Services

4.9. Banchory provides a range of additional facilities and services in addition to retail/retail services. These include:

- GP surgery
- MSP Office
- Dentist
- Library
- Clinics (2)
- Churches (2)
- Town Hall
- Funeral Director
- Registrar's Office
- Museum
- Cancer Support (local organisation – Clan)
- Vet

Heritage

4.10. There are 8 listed buildings within the town centre with the greatest concentration along the north side of the High Street. No part of the town centre is included within a Conservation Area. Figure 4.5 identifies the location of the listed buildings.

Figure 4.5: Banchory Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)

Household Survey Perceptions of the Town Centre

4.11. Figure 4.6 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for general comparison goods (all categories) is rated close to "poor" by residents (net balance of -27% to -41% of positive views). Choice of shops for bulky goods is identified to be between "average" and "good".
- Access to the town centre by car and by public transport is identified as "average" to "good with both public and car access given overall positive ratings.
- The town centre is identified as "good" to "very good" as a pleasant and attractive place to visit.
- Ratings are slightly better than average to combine shopping with leisure but poor for personal business.

4.12. In overall terms the town centre was viewed as average to good across all indicators for all the centres included within the survey and this was the third most positively viewed centre of the 14 included in the survey.

Frequency of Visit

4.13. The household survey identified that, for those living within postcode sectors close to Banchory, the average number of visits was close to once per week. Approximately 15% of those interviewed in the postcode sectors closest to the town centre did not visit the centre. A small proportion of respondents (16%) visited the centre frequently (at least twice per week) indicating it has a role for regularly top-up shopping/services whereas 37% only visited the centre occasionally indicating that the centre is also important for undertaking more specialist activities.

Conclusions

4.14. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally healthy picture of the vitality and viability of the centre, taking into account the limited size of the centre:

- Vacancies are slightly below national averages but have increased significantly since 2018.
- The retail goods offer within the centre is limited. The centre does provide some convenience and comparison offer but the principal market is aimed at day visitors and tourists, particularly in the tourist season. It also provides a limited role for local retail and leisure services. The centre also provides arrange of additional services and facilities.
- Convenience floorspace has declined whereas that for services has increased since 2018.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is high despite not having any significant areas of traffic calming/pedestrianisation. Although there are few listed buildings the historic character of the area is evident. This is viewed positively by residents.
- The centre is seen as easy to access by both public and private transport.
- Household interview responses provide, on balance, positive views of the town centre but a key weakness is the perceived poor offering for both general and bulky comparison goods.

Banchory Town Centre: Turnover, Catchment Area and Future Growth

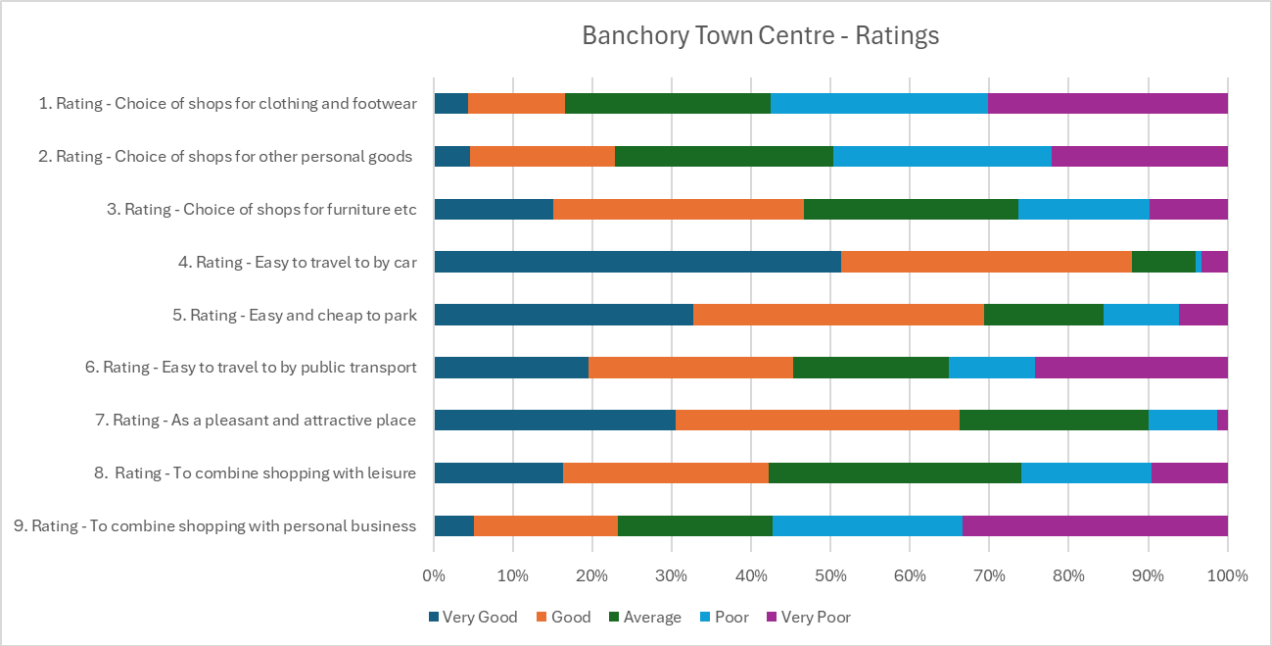
Turnover and Sales Densities

4.15. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 7 units; 531 sq m GFA; 345 sq m NFA (sales); and £3.57m turnover.
- General Comparison and Bulky Goods: 29 units; 4472 sq m GFA; 2907 sq m NFA (sales); and £9.08m turnover.
- Services: 35 units; 2945 sq m GFA
- Vacancies: 9 units; 809 sq m GFA

Figure 3.6 Household Survey: Attitudes to Banchory Town Centre

Banchory TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	4%	5%	15%	51%	33%	20%	30%	16%	5%
Good	12%	18%	32%	37%	37%	26%	36%	26%	18%
Average	26%	27%	27%	8%	15%	20%	24%	32%	20%
Poor	27%	27%	17%	1%	10%	11%	9%	16%	24%
Very Poor	30%	22%	10%	3%	6%	24%	1%	10%	33%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-41%	-27%	20%	84%	54%	10%	56%	16%	-34%
Balance Rank (of 14)	7	8	2	4	5	9	5	4	8



4.16. This confirms that, although services are the largest category of retail floorspace within the centre they do not dominate floorspace, instead a significant proportion of space and turnover is for convenience and comparison goods sales.

4.17. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 103% of national averages.
- General comparison goods densities are below national averages (61%).
- Bulky goods appear to be trading close to/slightly above national average levels (107%).

4.18. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Banchory to trade at levels slightly below national averages and, in this context, trading levels appear reasonably healthy.

Catchment Area and Market Penetration

4.19. Figure 4.7 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Banchory Town Centre and also the levels of market penetration for different goods categories. The figure also summarises other key information for the town centre in 2023 including the location of principal retail frontages. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA comprise Deeside i.e. Zones 19 (shire) 1+3 and 17. Market penetration levels in this area are low (<10%).
- Catchment areas for both General Comparison and Bulky Comparison Goods are similar to convenience goods i.e. zones 19 shire, 1+3 and 17. Market penetration levels in this area are low (<10%) part from general comparison goods in zone 19 which are 10-30%.

Future Changes in Retail Turnover: Banchory Town Centre

4.20. Figure 4.8 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

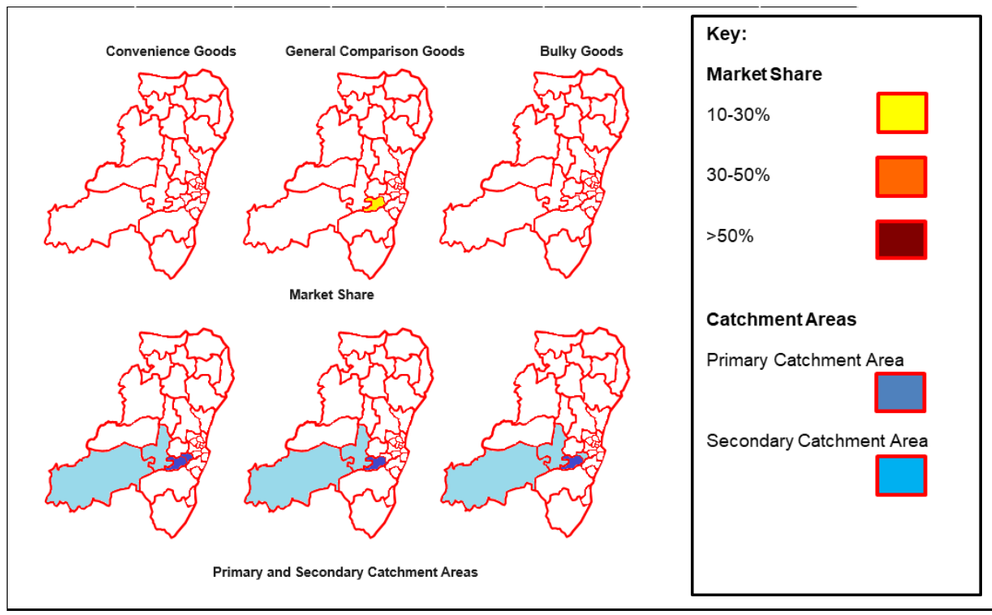
4.21. The principal forecasts are:

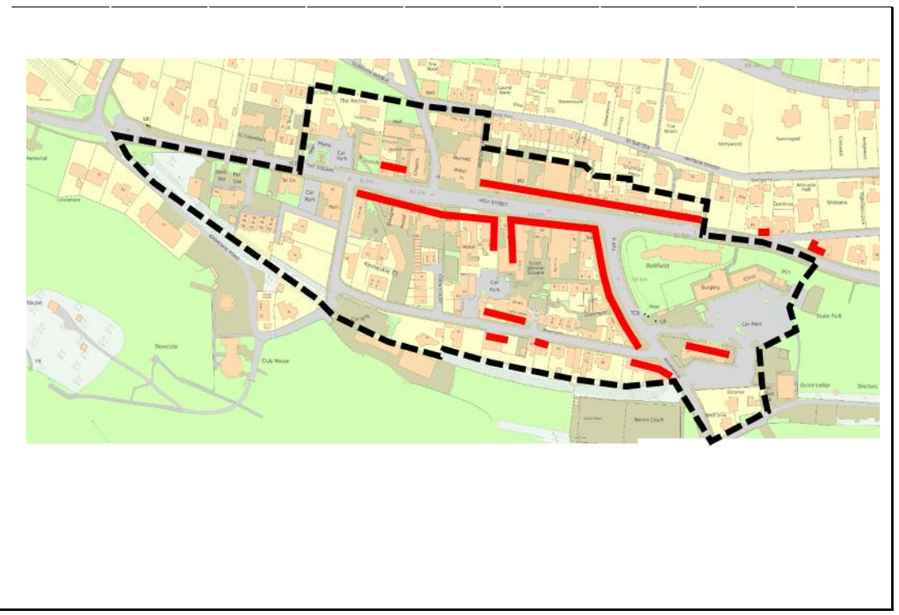
- Decrease in convenience turnover to 2028 (reflecting national expenditure growth forecasts) and thereafter a constant level of turnover. Decline to 2028 reflects increased competition from committed out of centre floorspace (Lidl and Home Bargains).
- Significant growth for general comparison and bulky goods turnover, particularly from 2028.

4.22. In overall terms turnover for the town centre is to decline to 2028 and , thereafter to grow steadily to 2038.

4.23. Sales densities for convenience goods will reduce reflecting the forecast changes in turnover for all goods categories.

Figure 4.7: Banchory Town Centre - Key Retail Characteristics





Floorspace and Turnover 2023																	
		Convenience				General Comparison				Bulky Goods				All Goods			
	No.	GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover	
		Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m
Total Floorspace (Retail Goo	36	531	345		3.57	3888	2527		7.76	584	380		1.33	5003	3252		12.66
Retail Services	35													2945			
Vacant	9													809			
ALL RETAIL GOODS AND S	**80**	**531**	**345**		**3.57**	**3888**	**2527**		**7.76**	**584**	**380**		**1.33**	**8757**			**12.66**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	7	31	23	0	61	£14.97m
2013	7	34	28	2	71	£13.63m
2018					0	
2023	7	29	35	9	80	£12.66m
					change 2013-23	-7%
					change 2004-23	-15%

Vitality and Viability Summary

2023 Household Survey. Positive views were expressed regarding bulky goods retail, easy of access/parking by car, as an attractive place and to combine with leisure activities. Below average responses identified for general comparison goods retail offer and for personal business.

Strengths
Wide range of retail and other services; strong independent sector; high quality and attractive environment.

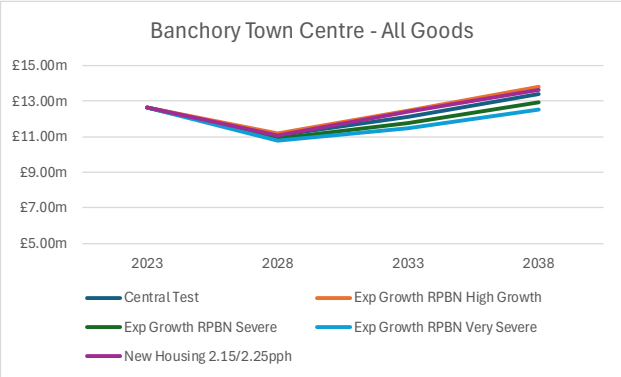
Weaknesses
Vacancies have increased significantly in recent years (but still slightly beelow average); limited retail offer for comparison goods

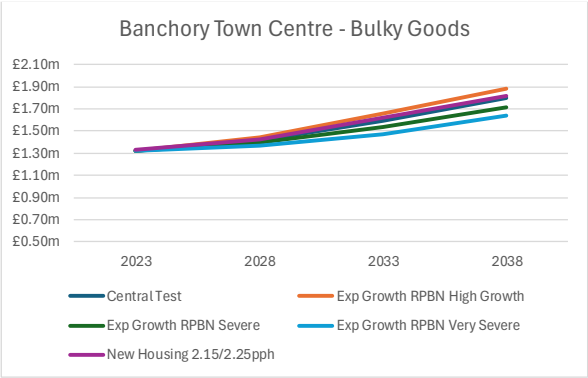
Others
Banchory has an important tourism/day visitor profile and is more limited in terms of its offer as a traditional town centre. Turnover has been relatively stable despite recent opening of Tesco superamarket but increase in vacancies could be a concern.

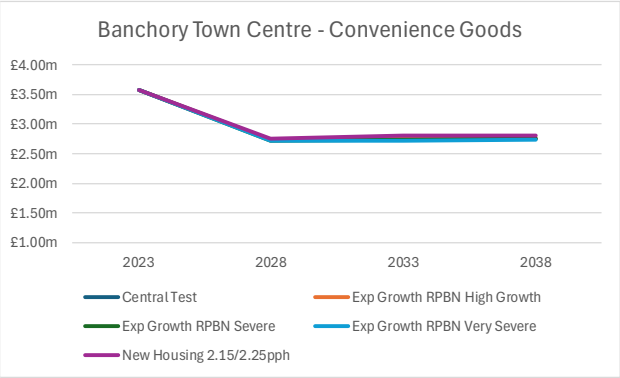
Retail Strategy Summary

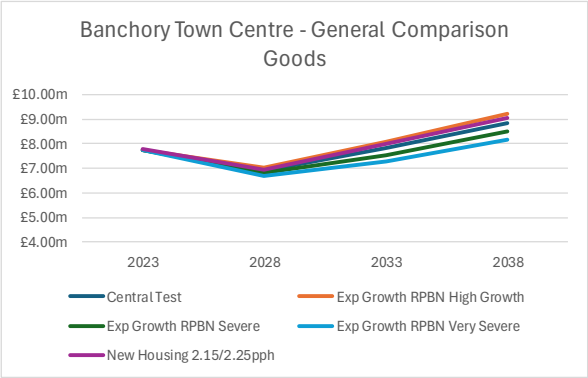
Centre Classification	Principal Town Centre
Planning Policy Approach	Protection and recognise specialist role.
Proposed Retail Floorspace	
Commitments	
Proposals	Significant OOC floorspace adjacent to Tesco for food and non-food retail

Figure 4.8: Forecast Future Turnover of Banchory Town Centre





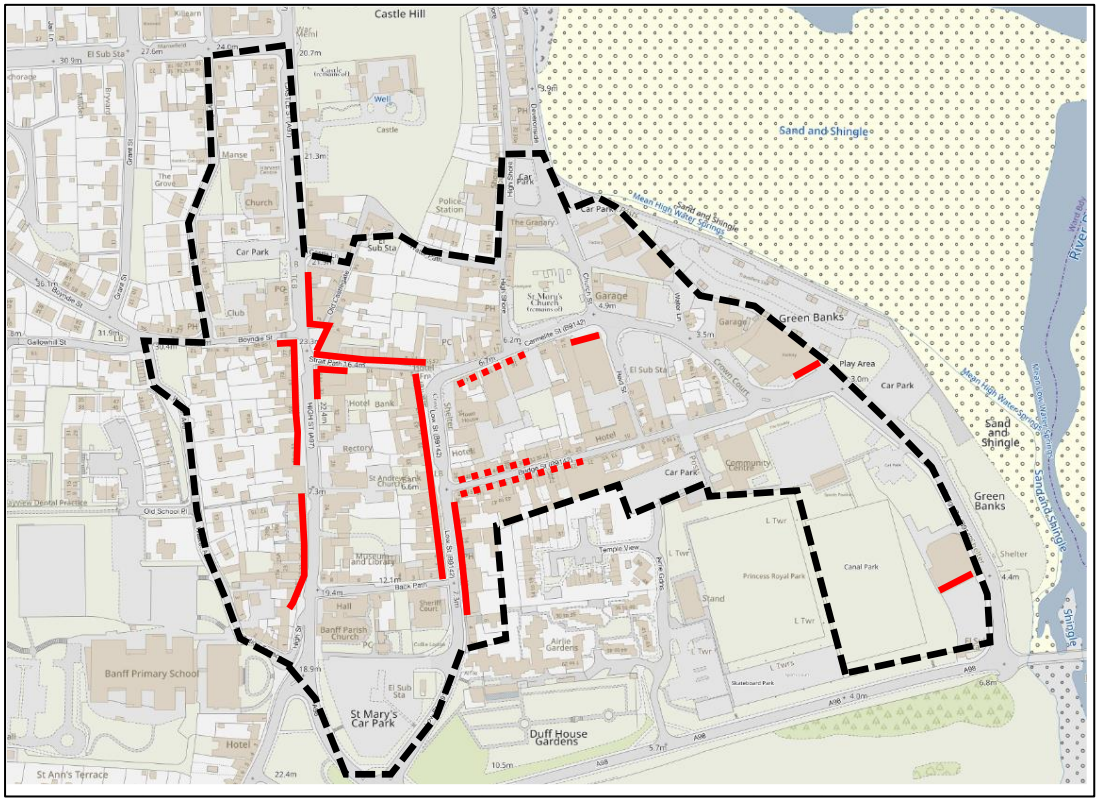




Banff Town Centre

4.24. Figure 4.9 identifies the extent of Banff town centre as defined in the LDP.

Figure 4.9 Banff Town Centre



Space in Use

Numbers of Units by Type

4.25. Figure 4.10 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 4.10: Banff Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	9	10		11
Comparison	35	36		27
Retail, Leisure + Business Services	31	31		39
Vacant	14	7		25
TOTAL	89	84		102
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	1787	3669		4868
Comparison	5625	8874		5572
Retail, Leisure + Business Services	3443	3442		9662
Vacant	2291	1145		2261
TOTAL	13146	17130		22363

Changes Over Time

4.26. Examination of Figure 4.10 indicates some trends in changes in provision since 2004 including a significant reduction in numbers and floorspace for comparison goods but an increase in convenience floorspace. The substantial increase in services floorspace primarily reflects a wider range of units included in the Goad definition of retail/leisure services plus updated data from the Regional Assessor. Vacancies have also increased significantly between 2013 and 2023 and are, currently, at levels much higher than previously recorded.

Vacancies

Vacancy Rates

4.27. Figure 4.10 also sets out information on vacancies within Banff town centre. In 2023/24 the vacancy rates were:

- Number of units: 25%
- Floor area: 10%

4.28. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Banff town centre's vacancy rate is substantially higher than the UK average by number of units but slightly below by area of units. This confirms that the vacancies are primarily in smaller units.

Changes over Time

4.29. Figure 4.10 indicates that vacancies have increased significantly from 2013 and are at the highest level recorded in the retail studies of the town.

Additional Facilities/Services

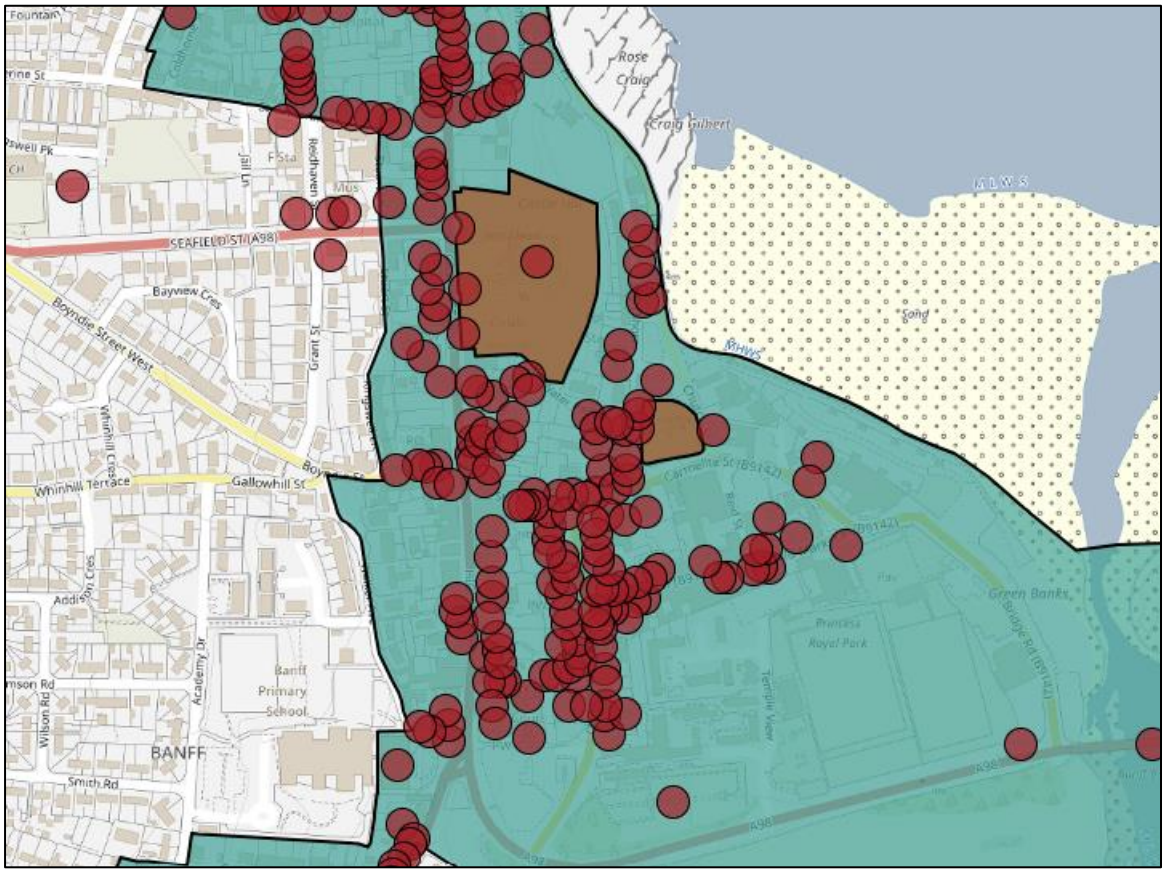
4.30. Banff provides a range of additional facilities and services in addition to retail/retail services. These include:

- Sports ground, pavilion and stadium
- Community Centre
- Business Hub
- Banff Business Centre
- Council offices
- Job Centre+
- Clinic
- GPO Delivery Office
- Churches/places of worship and halls (3)GP surgery
- Police
- Dentists (2)
- Sherriff Court
- Museum
- Local Hero Festival Premises
- Banff Castle Community + Arts
- Local community groups premises

Heritage

4.31. There are approximately 150-160 listed buildings within the town centre, two scheduled monuments (Banff Castle and St Mary's Church and Burial Ground) and most of the town centre is included within the Banff Conservation Area. Figure 4.11 identifies the location of the listed buildings and other heritage designations.

Figure 4.11: Banff Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)



Household Survey Perceptions of the Town Centre

4.32. Figure 4.12 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for general comparison goods (all categories) is rated between "poor" and "very poor" (net balance of -60% to -85% of positive views).
- Access to the town centre by car and by public transport is identified as "average" to "good with both public and car access given overall positive ratings.
- The town centre is identified as "average" as a pleasant and attractive place to visit.
- Ratings are "poor" to "very poor" as a location to combine shopping with leisure or for personal business.

4.33. In overall terms the town centre was viewed as generally "poor" across all indicators for all the centres included within the survey and this was the lowest ranking centre out of the 14 included in the survey.

Frequency of Visit

4.34. The household survey identified that, for those living within postcode sectors close to Banff, the average number of visits was one to two visits per week. Over half of the respondents visited the town centre at least once per week and these responses indicate the principal role of the town centre for frequent top-up shopping/services.

Conclusions

4.35. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally below average picture of the vitality and viability of the centre, taking into account its limited size:

- Vacancies are significantly above average by number of units but close to/below national averages in terms of floorspace. Vacancies have increased significantly since 2018.
- The retail goods offer within the centre is limited. The non-food offer is viewed poorly by respondents to the survey.
- The centre does provide a significant range of additional (non-retail) services and facilities.
- Convenience floorspace has increased as has space for services but floorspace for comparison goods has declined since 2018.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is generally high reflecting the historic character of the town centre. However, high levels of vacancies (e.g. along Bridge Street) significantly detract from the environmental quality of the town centre.
- The centres is seen as easy to access by both public and private transport.
- Household interview responses provide, on balance, the most negative views of the centre out of the 14 included in the survey. Key weaknesses identified are poor comparison goods offer, and lack of opportunities for leisure and personal business.

Banff Town Centre: Turnover, Catchment Area and Future Growth

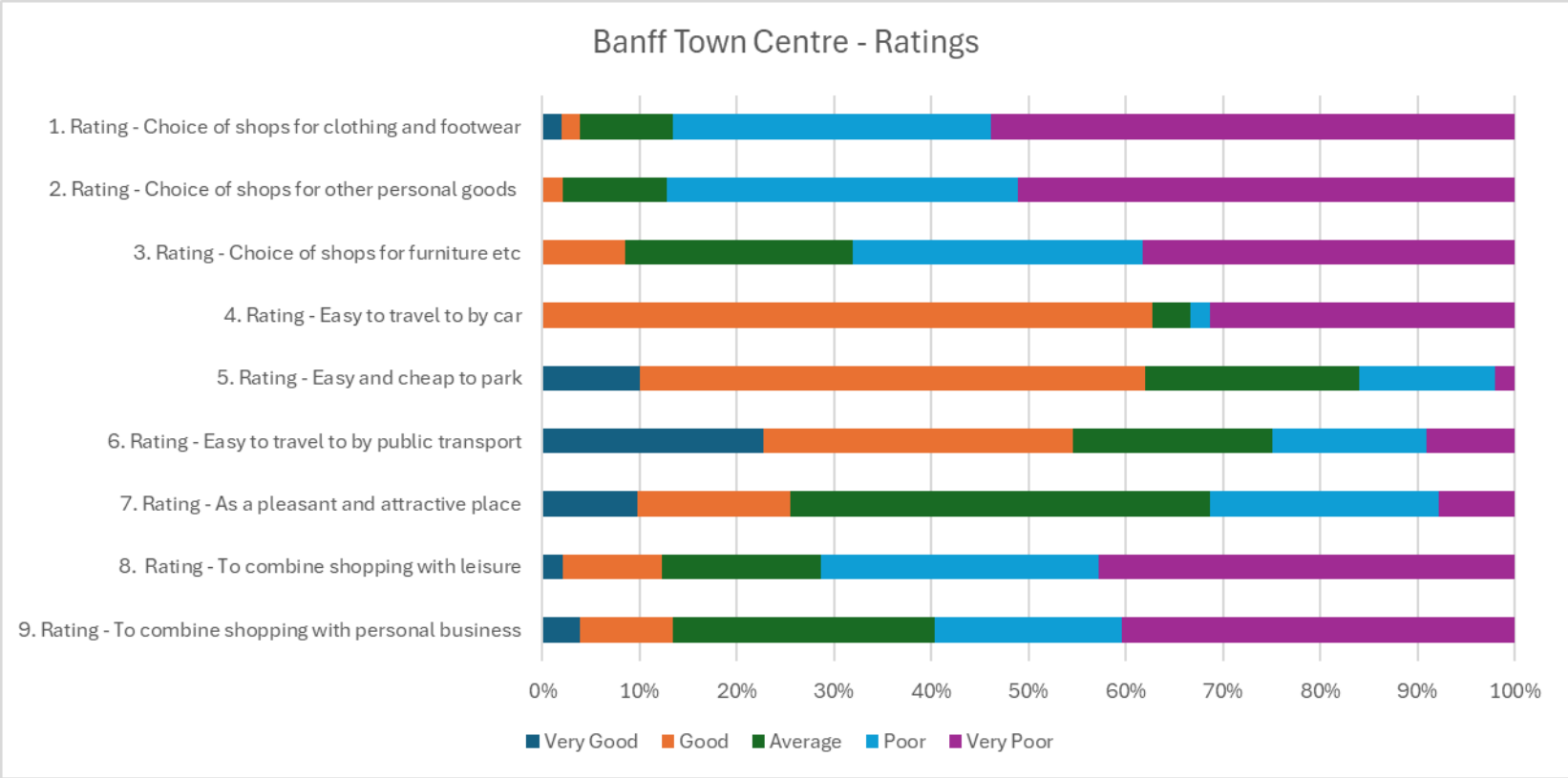
Turnover and Sales Densities

4.36. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 9 units; 4868 sq m GFA; 3164 sq m NFA (sales); and £22.01 turnover. Turnover is dominated by the Tesco and Co-op supermarkets.
- General Comparison and Bulky Goods: 27 units; 5572 sq m GFA; 3622 sq m NFA (sales); and £11.13m turnover.
- Services: 39 units; 9662 sq m GFA
- Vacancies: 25 units; 2261 sq m GFA

Figure 4.12 Household Survey: Attitudes to Banff Town Centre

Banff TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	2%	0%	0%	0%	10%	23%	10%	2%	4%
Good	2%	2%	9%	63%	52%	32%	16%	10%	10%
Average	10%	11%	23%	4%	22%	20%	43%	16%	27%
Poor	33%	36%	30%	2%	14%	16%	24%	29%	19%
Very Poor	54%	51%	38%	31%	2%	9%	8%	43%	40%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-83%	-85%	-60%	29%	46%	30%	-6%	-59%	-46%
Balance Rank (of 14)	13	14	10	13	8	3	11	14	9



4.37. This confirms that, although services are the largest category of retail floorspace within the centre they do not dominate floorspace, instead a significant proportion of space and turnover is for convenience and comparison goods sales.

4.38. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 65% of national averages.
- General comparison goods densities are below national averages (75%).
- Bulky goods appear to be trading below average levels (67%).

4.39. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Banff to trade at levels slightly below national averages but, even allowing for this, trading levels appear weak.

Catchment Area and Market Penetration

4.40. Figure 4.13 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Banff Town Centre and also the levels of market penetration for different goods categories. The figure also summarises other key information for the town centre in 2023 including the location of principal retail frontages within the town centre. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA are restricted to Zone 7 (Banff and Macduff). Market penetration levels in this area are between 30% and 50%.
- Catchment areas for both General Comparison and Bulky Comparison Goods are Zone 7 for the PCA and Zone 6 for the SCA. Market penetration levels in the PCA are 10-30% for both general and bulky comparison goods and <10% in the SCA.

Future Changes in Retail Turnover: Banff Town Centre

4.41. Figure 4.14 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

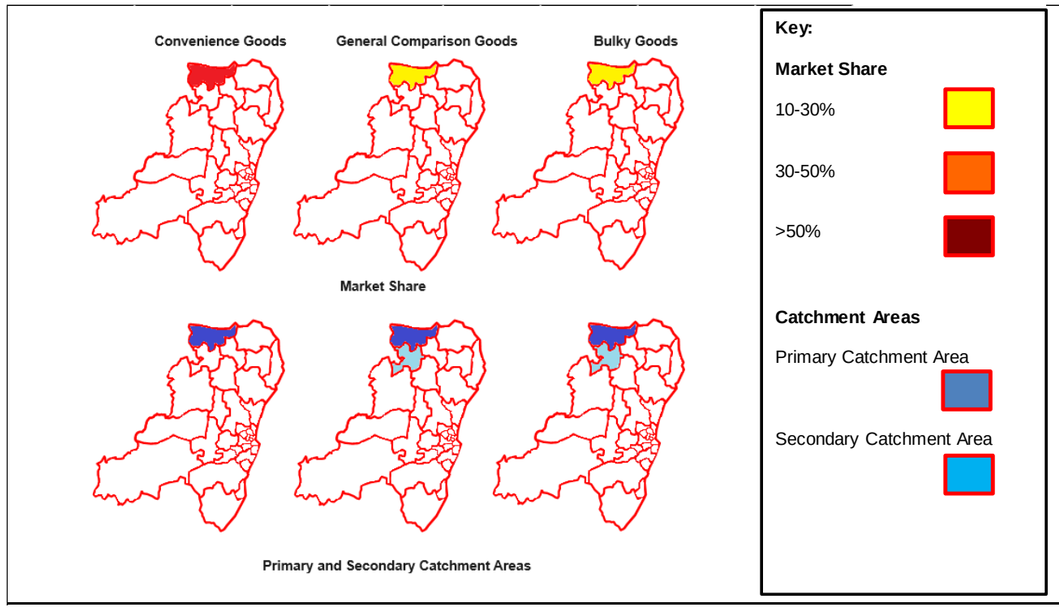
4.42. The principal forecasts are:

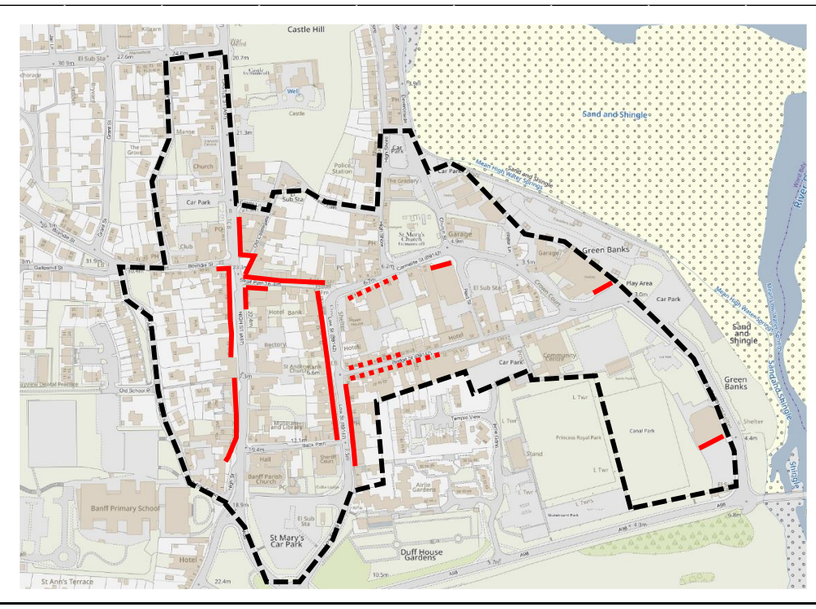
- Decrease in convenience turnover to 2038. This reflects a combination of flat available expenditure per capita, low population growth and competition from Aldi in Macduff.
- Significant growth for general comparison and bulky goods turnover, particularly from 2028.

4.43. In overall terms turnover for the town centre is broadly flat to 2028 and thereafter modest growth to 2038.

4.44. Sales densities for convenience goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 4.13: Banff Town Centre - Key Retail Characteristics





Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Floorspace (Retail Goo	38	4868	3164		22.01	2684	1745		7.03	2887	1877		4.10	10440	6786		33.14
Retail Services	39													9662			
Vacant	25													2261			
ALL RETAIL GOODS AND S	**102**	**4868**	**3164**		**22.01**	**2684**	**1745**		**7.03**	**2887**	**1877**		**4.10**	**22363**			**33.14**

Recent Changes

Year	Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
	No. of Units					
2004	9	35	31	14	89	£25.03m
2013	10	36	31	7	84	£31.68m
2018						
2023	11	27	39	25	102	£33.14m
					change 2013-23	+5%
					change 2004-23	+32%

Vitality and Viability Summary

2023 Household Survey. Positive responses identified in terms of accessibility - by car and public transport. Neutral response identified for attractiveness of centre. All other indicators were strongly negative - for choice of comparison goods shops (all categories) and for combning with leisure and personal business.

Strengths
Strong independent sector and good offer for retail and related services; histoiric/attractive core.

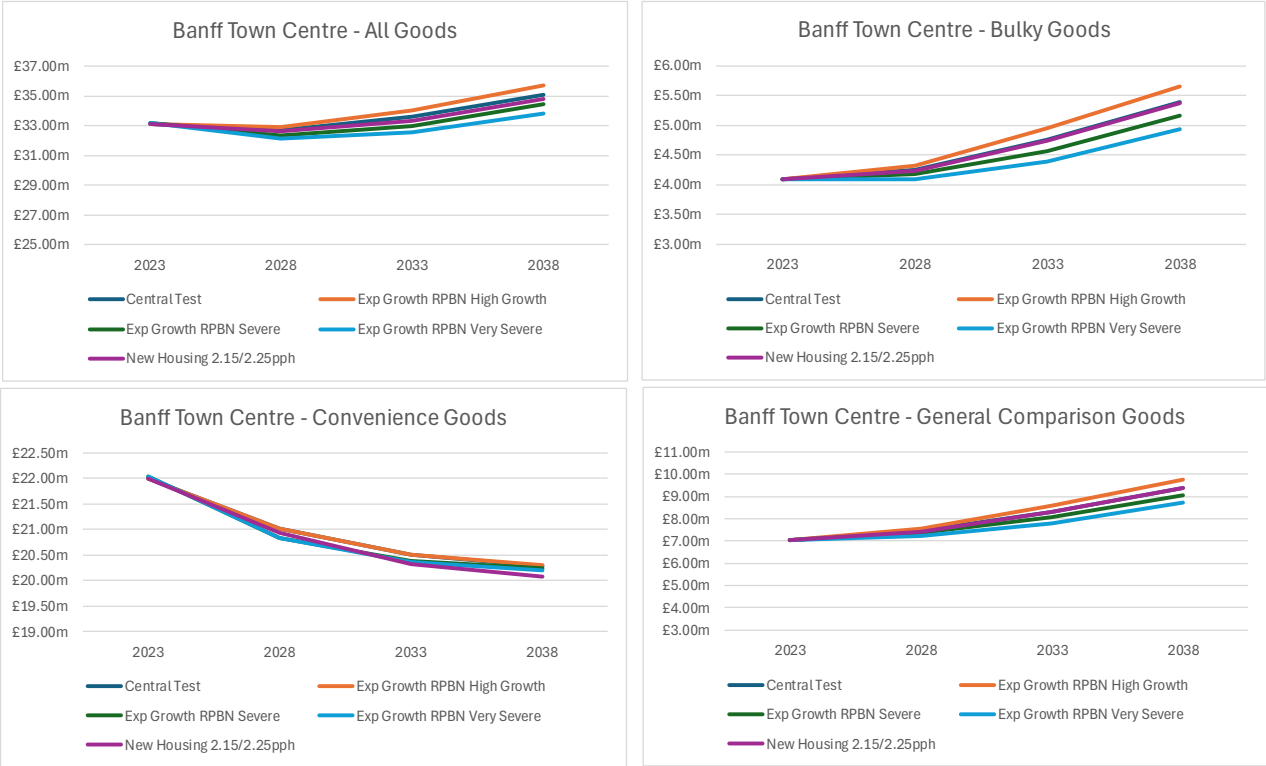
Weaknesses
Centre has suffered significant decline with high levels of vacancies (25% by number of units and 10% by floorspace). Low levels of satisfaction with centre.

Others
Major concern about increase in vacancies since 2013 (additional units identified in surveys reflects amendment to definitions).

Retail Strategy Summary

Centre Classification	Principal Town Centre
Planning Policy Approach	Protecction
Proposed Retail Floorspace	
Commitments	Additional floorspace to serve OP1 and OP2 should not threaten town centre.
Proposals	

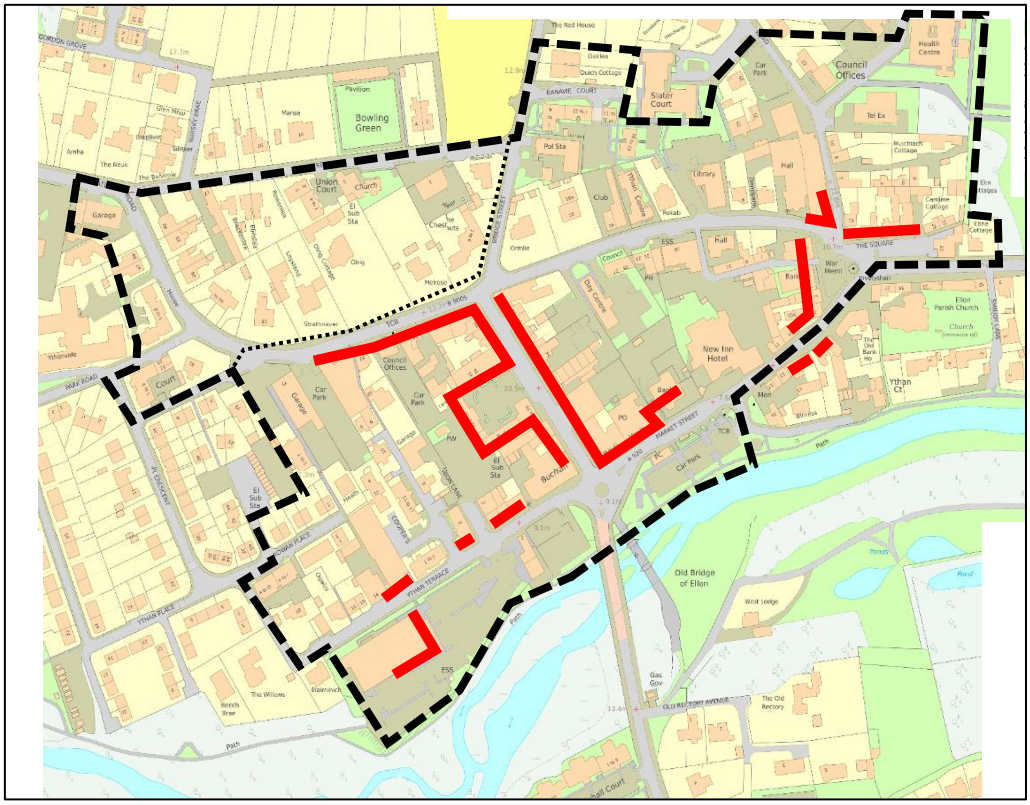
Figure 4.14 Forecast Future Turnover of Banff Town Centre



Ellon Town Centre

4.45. Figure 4.15 identifies the extent of Ellon town centre as defined in the LDP.

Figure 4.15 Ellon Town Centre



Space in Use

Numbers of Units by Type

4.46. Figure 4.16 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 4.16: Ellon Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	7	7		11
Comparison	24	31		20
Retail, Leisure + Business Services	33	36		49
Vacant	3	2		8
TOTAL	67	76		88
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	3084	1840		2505
Comparison	4529	4654		3503
Retail, Leisure + Business Services	3029	4049		5037
Vacant	134	2194		756
TOTAL	10776	12737		11800

Changes Over Time

4.47. Examination of Figure 4.16 indicates significant trends in changes in provision since 2004 including a significant reduction in numbers and floorspace for comparison goods but an increase in services floorspace. The number of convenience units has increased but the floorspace is still lower than that identified in 2004. Vacancies have also increased significantly since 2013.

Vacancies

Vacancy Rates

4.48. Figure 4.16 also sets out information on vacancies within Ellon town centre. In 2023/24 the vacancy rates were:

- Number of units: 9%
- Floor area: 7%

4.49. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Ellon's town centre's vacancy rate is slightly lower than the UK average by number of units but significantly lower by area of units.

Changes over Time

4.50. Figure 4.16 indicates that vacancies by number of units have increased significantly from 2013 but, in terms of floorspace, vacancies have reduced.

Additional Facilities/Services

4.51. Ellon provides a range of additional facilities and services in addition to retail/retail services. These include:

- Dentist
- Clinics (2)
- Music School
- Council office
- Funeral Director
- Community Mental Health support
- Churches and halls (3)
- Fire Station
- Police Station
- Ellon Resource Centre (social work)
- Library
- Ellon Castle Gardens
- Vet
- Home Care Services office

Heritage

4.52. There are 7 listed buildings within/adjacent to the town centre and no part of the town centre is within/adjacent to a Conservation Area. However, notwithstanding the lack of heritage features the River Ythan has a positive impact on the overall environment of the town centre.

Figure 4.17: Ellon Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)

Household Survey Perceptions of the Town Centre

4.53. Figure 4.18 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for general comparison goods (all categories) and bulky goods is rated as generally "poor" (net balance of -31% to -54% of positive views).
- Access to the town centre by car and for parking is viewed as "good" to "very good" but access by public transport is between "average" and "poor".
- The town centre is identified as "good" as a pleasant and attractive place to visit.
- Ratings are average as a place for combining shopping with leisure but poor to combine with personal business.

4.54. In overall terms the town centre was viewed as generally "poor" across all indicators for all the centres included within the survey and this was the 10th ranked centre out of the 14 included in the survey.

Frequency of Visit

4.55. The household survey identified that, for those living within postcode sectors close to Ellon, the average number of visits was once per week. Over one quarter of respondents (28%) living in postcodes close to Ellon never visited the centre which was the highest proportion of all centres included in the survey. Over 40% of the respondents visited the town centre at least once per week and these responses indicate the principal use of the town centre is for frequent top-up shopping/services.

Conclusions

4.56. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally mixed picture of the vitality and viability of the centre, taking into account the limited size of the centre:

- Vacancies are below average by number of units and floorspace but have increased in terms of number of units since 2013.
- The retail goods offer within the centre is limited. The non-food offer is viewed poorly by respondents to the survey.
- The centre does provide a significant range of additional (non-retail) services and facilities.
- Convenience floorspace has increased as has space for services but floorspace for comparison goods has declined since 2013.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is generally good reflecting, in part, the influence of the River Ythan flowing adjacent to the town centre. Through traffic can adversely impact the amenity of shoppers in the town centre.
- The centres is seen as easy to access by private transport but not by public transport.
- Household interview responses provide, on balance, a negative view of the town centre and a significant proportion of residents living nearby choose not to visit the town centre.

Ellon Town Centre: Turnover, Catchment Area and Future Growth

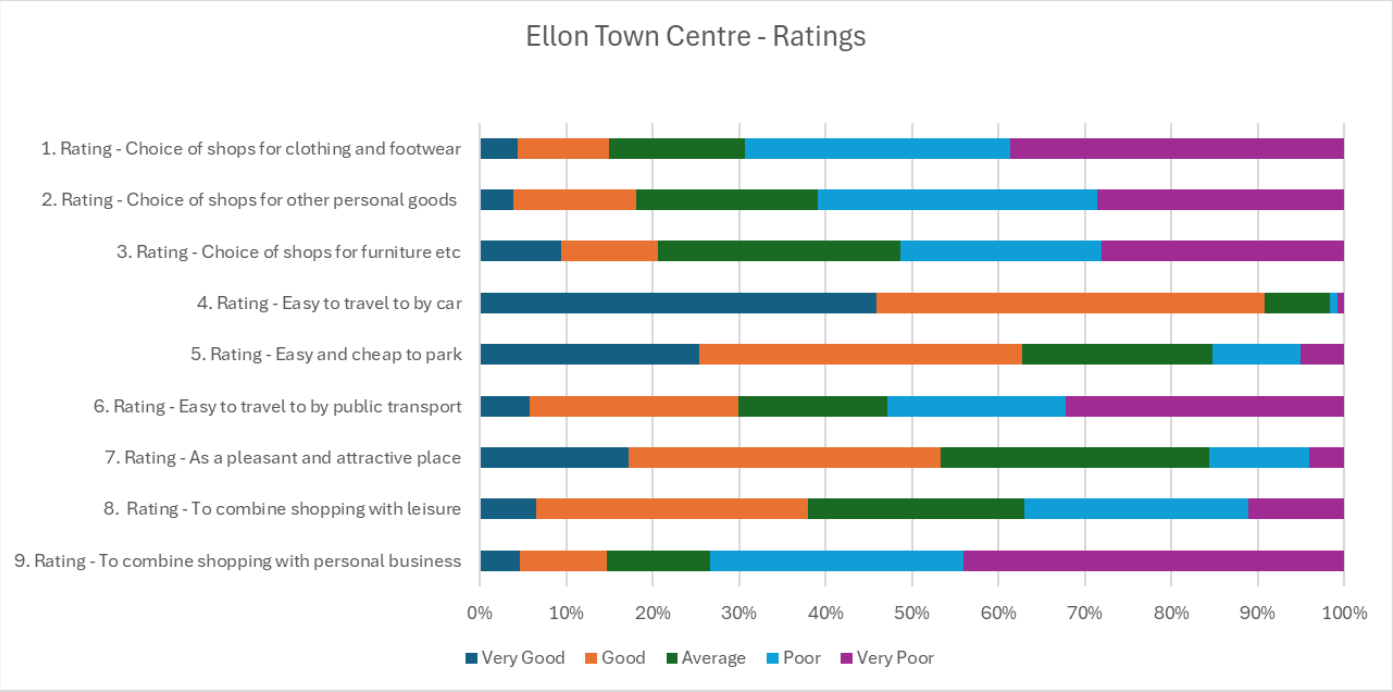
Turnover and Sales Densities

4.57. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 11 units; 2505 sq m GFA; 1685 sq m NFA (sales); and £21.75 m turnover. Turnover is dominated by the Aldi supermarket.
- General Comparison and Bulky Goods: 20 units; 3503 sq m GFA; 2291 sq m NFA (sales); and £9.82m turnover.
- Services: 49 units; 5037 sq m GFA
- Vacancies: 8 units; 756 sq m GFA

Figure 4.18. Household Survey: Attitudes to Ellon Town Centre

Ellon TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	4%	4%	9%	46%	25%	6%	17%	6%	5%
Good	11%	14%	11%	45%	37%	24%	36%	31%	10%
Average	16%	21%	28%	8%	22%	17%	31%	25%	12%
Poor	31%	32%	23%	1%	10%	21%	11%	26%	29%
Very Poor	39%	29%	28%	1%	5%	32%	4%	11%	44%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-54%	-43%	-31%	89%	47%	-23%	38%	1%	-59%
Balance Rank (of 14)	9	10	8	1	7	14	7	8	11



4.58. This confirms that, although services are the largest category of retail floorspace within the centre they do not dominate floorspace, instead a significant proportion of space and turnover is for convenience and comparison goods sales.

4.59. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 108% of national averages.
- General comparison goods densities are below national averages (80%).
- Bulky goods appear to be trading slightly above average levels (124%).

4.60. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Ellon, to trade at levels slightly below national averages and, allowing for this, trading levels appear healthy.

Catchment Area and Market Penetration

4.61. Figure 4.19 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Ellon Town Centre and also the levels of market penetration for different goods categories. The figure also summarises other key information for the town centre in 2023 including the location of principal retail frontages. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA are restricted to Zone 13 (Ellon) extending into Zone 14 Newburgh. Market penetration levels in this area are between 10% and 30%.
- Catchment areas for both General Comparison and Bulky Comparison Goods are also Zone 13 for the PCA and, for bulky goods extend up towards Peterhead (Zone 10) for the SCA. Market penetration levels in the PCA are 10-30% for both general and bulky comparison goods and <10% in the SCA.

Future Changes in Retail Turnover: Ellon Town Centre

4.62. Figure 4.20 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

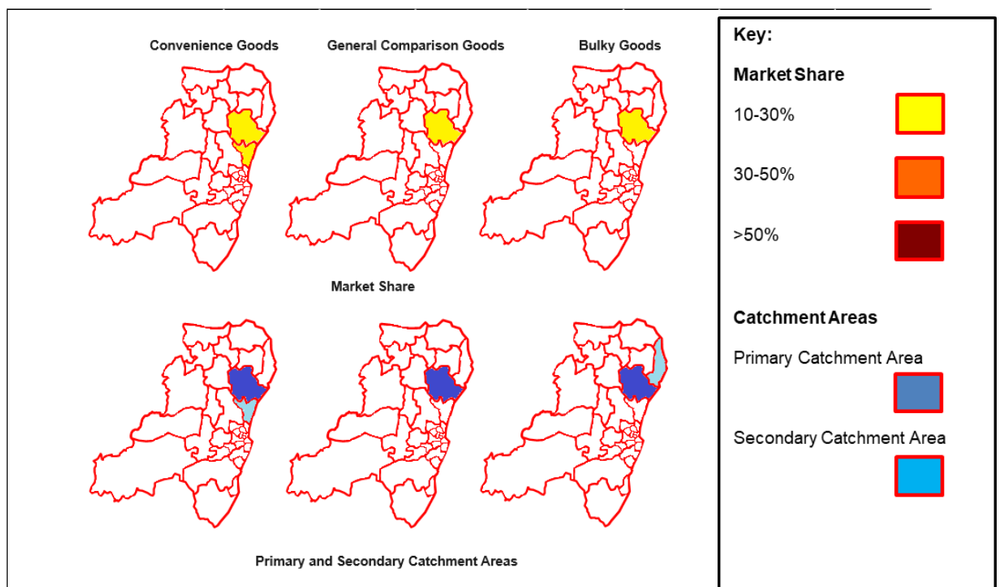
4.63. The principal forecasts are:

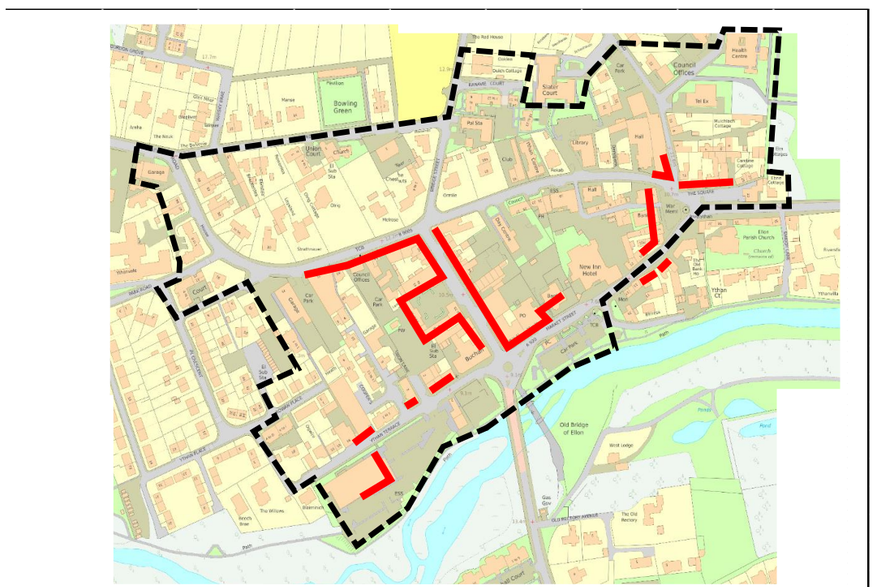
- Broadly flat convenience turnover to 2028 and increasing thereafter reflecting growth in population in the catchment area.
- Significant growth for general comparison and bulky goods turnover, particularly from 2028.

4.64. In overall terms turnover for the town centre is slight growth to 2028 and thereafter significant growth to 2038.

4.65. Sales densities for convenience goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 4.19: Ellon Town Centre - Key Retail Characteristics





Floorspace and Turnover 2023																
		Convenience				General Comparison				Bulky Goods				All Goods			
	No.	GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover	
		Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m
Total Retail Goods Floorspace	31	2505	1685		21.75	2268	1489		6.59	1234	802		3.22	6008	3976		31.56
Retail Services	49													5037			
Vacant	8													756			
ALL RETAIL GOODS AND SERVICES	**88**	**2505**	**1685**		**21.75**	**2268**	**1489**		**6.59**	**1234**	**802**		**3.22**	**11800**			**31.56**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	7	24	33	3	67	£26.38m
2013	7	31	36	2	76	£13.22m
2018					0	
2023	11	20	49	8	88	£31.56m
					change 2013-23	+139%
					change 2004-23	+20%

Vitality and Viability Summary

2023 Household Survey. Positive views regardiing accessibility of centre by car, for parking and as an attractive place. Neutral response identified for leisure activities. Significantly negative responses for all categories of comparison goods shopping, access by public transport and for combining with personal business.

Strengths
Strong independent sector; good range of additional services and convenience goods offer. Highly attractive riverside setting. Vacancies remain below national averages.

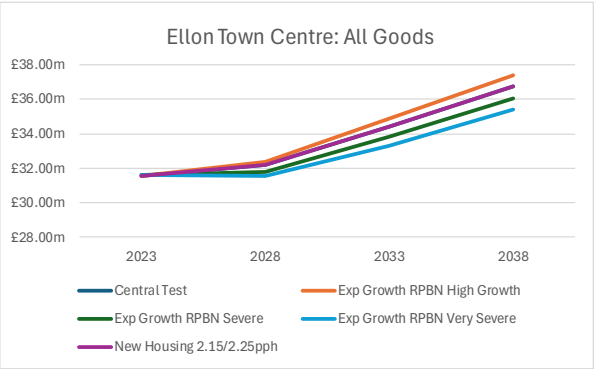
Weaknesses
Limited comparsion goods offer with few multiples. Vacancies have significantlly increased but remain below average. Low level of satisfaction with comparison goods shopping offer.

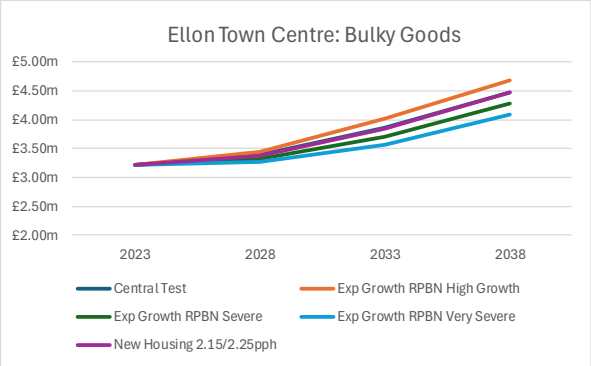
Others
Increase in units reflects redefinition of retail and related services. Significant concern about increase in vacancies. High increase in turmnover reflects opening of Aldi post-2003 but turnover appears to be improving despite increased vacancies.

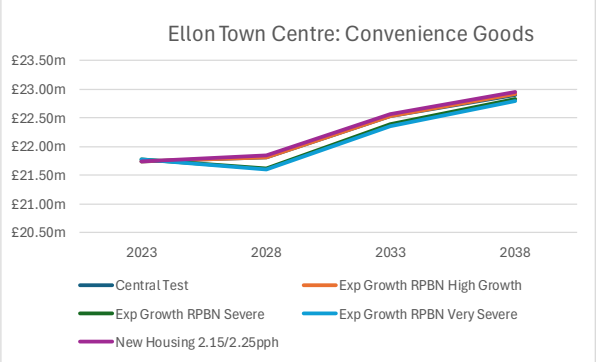
Retail Strategy Summary

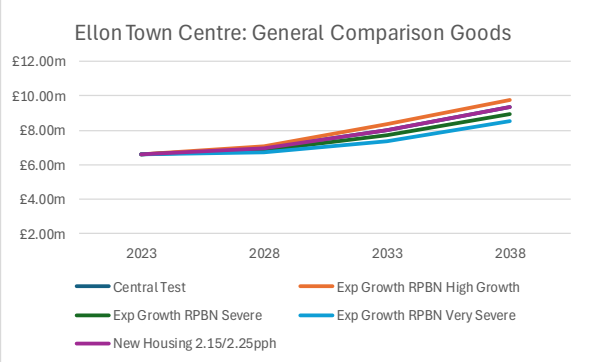
Centre Classification	Principal Town Centre
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	Additional floorspace to serve Cromleybank should not threaten town centre.

Figure 4.20 Forecast Future Turnover of Ellon Town Centre





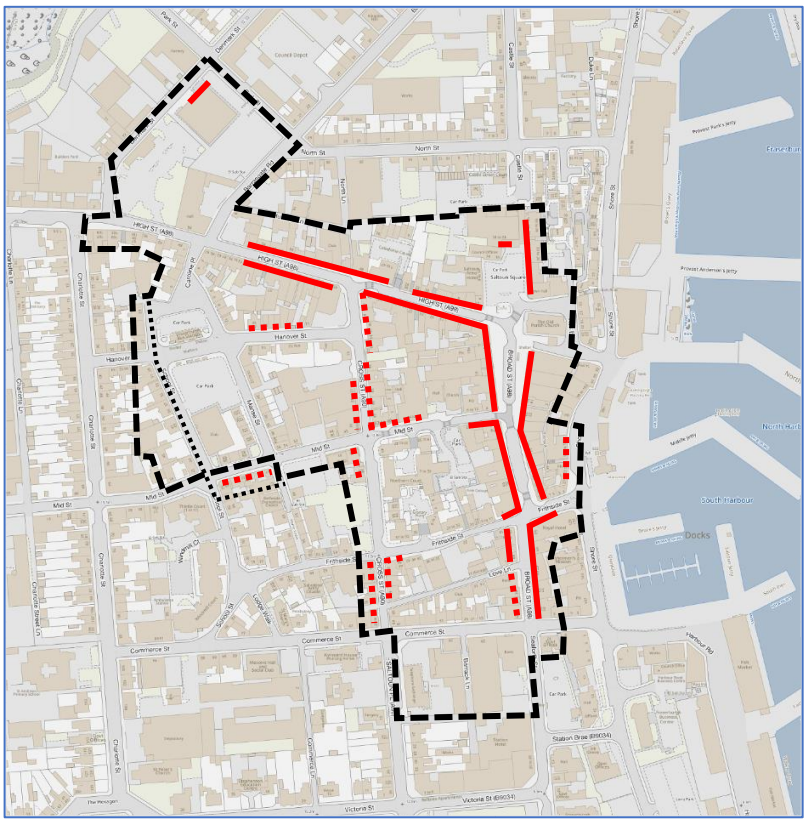




Fraserburgh Town Centre

4.66. Figure 4.21 identifies the extent of Fraserburgh town centre as defined in the LDP.

Figure 4.21. Fraserburgh Town Centre



Space in Use

Numbers of Units by Type

4.67. Figure 4.22 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 4.22: Fraserburgh Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	19	19		15
Comparison	73	57		60
Retail, Leisure + Business Services	39	64		87
Vacant	21	23		16
TOTAL	152	163		178
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	2943	3314		3346
Comparison	16541	12764		12154
Retail, Leisure + Business Services	5030	7535		3139
Vacant	1627	1820		853
TOTAL	26141	25433		19491

Changes Over Time

4.68. Examination of Figure 4.22 indicates significant trends in changes in provision since 2004 including a significant reduction in numbers and floorspace for comparison goods but an increase in services floorspace. The number of convenience units has decreased but the floorspace has remained close to its level in 2013. Vacancies have decreased significantly since 2013.

Vacancies

Vacancy Rates

4.69. Figure 4.22 also sets out information on vacancies within Fraserburgh town centre. In 2023/24 the vacancy rates were:

- Number of units: 9%
- Floor area: 4%

4.70. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Fraserburgh town centre's vacancy rate is lower than the UK average by number of units and significantly lower by area of units.

Changes over Time

4.71. Figure 4.22 indicates that vacancies have decreased significantly from 2013 both in terms of numbers of units and floorspace.

Additional Facilities/Services

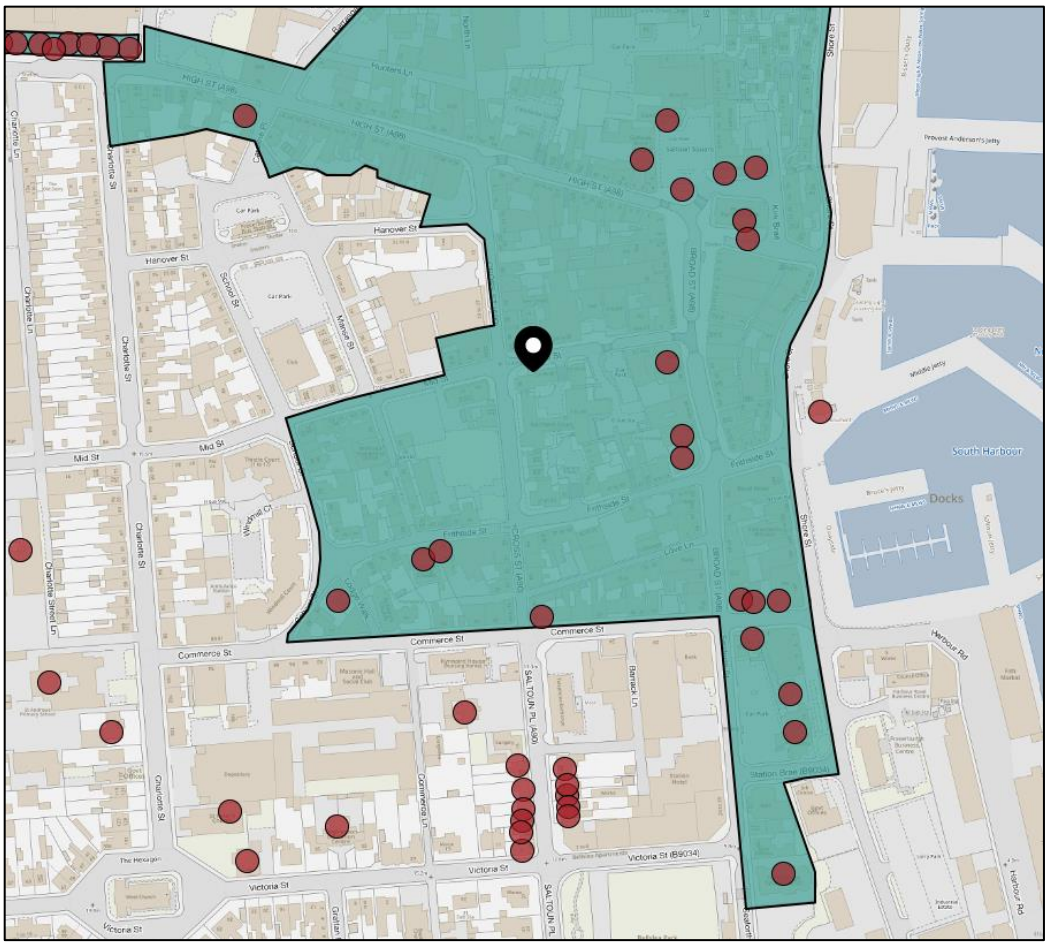
4.72. Fraserburgh provides a range of additional facilities and services in addition to retail/retail services. These include:

- Job Centre+
- NHS Vaccination Centre
- Churches/Places of Worship and Halls (6)
- Council Services
- Faithlie Centre
- Citizens Advice Bureau
- Foyer
- Dance Studios (2)
- Dentist
- Dalrymple Hall & Arts Centre
- Leisure Centre
- Crossroads
- GPO Sorting Office/Collection
- Bus Station
- Royal British Legion/Clubs

Heritage

4.73. There are 33 Listed Buildings within/adjacent to the town centre and most of the town centre is included within Fraserburgh Town Centre Conservation Area. In addition, although industrial in character, the proximity of the harbour area adds positively to the character of the town centre.

Figure 4.23: Fraserburgh Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)



Household Survey Perceptions of the Town Centre

4.74. Figure 4.24 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for general comparison goods (all categories) was viewed as generally "poor" whereas bulky goods as "average" to "good".
- Access to the town centre by car and for parking is viewed as "good" to "very good" but access by public transport is between "average" and "good".
- The town centre is identified as "average" to "poor" as a pleasant and attractive place to visit.
- Ratings are "average" as a place for combining shopping with leisure but "good" to combine with personal business.

4.75. In overall terms the town centre was viewed as generally "average" across all indicators for all the centres included within the survey and this was the 5th ranked centre out of the 14 included in the survey.

Frequency of Visit

4.76. The household survey identified that, for those living within postcode sectors close to Fraserburgh, the average number of visits was one-two per week. Hardly any respondents (2%) living in postcodes close to Fraserburgh never visited the centre which was the lowest proportion of all centres included in the survey. Half (50%) of respondents visited the town centre at least once per week and these responses indicate the principal role of the town centre for frequent top-up shopping/services.

Conclusions

4.77. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally mixed to positive picture of the vitality and viability of the centre, taking into account the size of the centre:

- Vacancies are below average by number of units and floorspace and have decreased in terms of number of units and floorspace since 2013.
- Most categories of goods are available within the centre although the choice is often limited. The non-food offer is, however, viewed poorly by respondents to the survey.
- The centre does provide a significant range of additional (non-retail) services and facilities.
- Both convenience and comparison floorspace has remained generally constant since 2013.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is mixed – parts of the centre have historic interest but some buildings are of mixed quality/condition.
- The centre is seen as easy to access by private transport and reasonable by public transport.
- Household interview responses provide, on balance, a positive view of the town centre with residents frequently visiting the centre.

Fraserburgh Town Centre: Turnover, Catchment Area and Future Growth

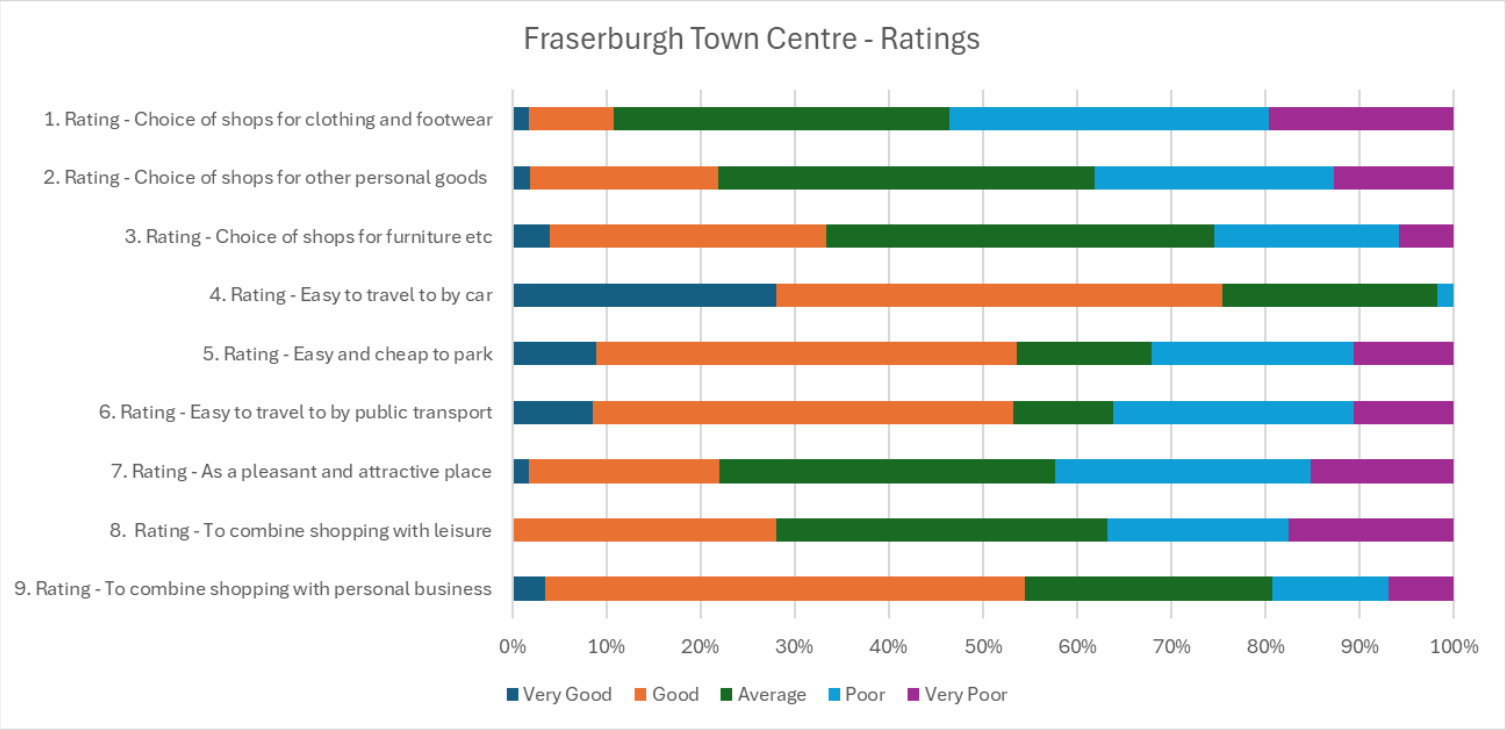
Turnover and Sales Densities

4.78. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 15 units; 3346 sq m GFA; 2510 sq m NFA (sales); and £16.25 m turnover.
- General Comparison and Bulky Goods: 75 units; 12154 sq m GFA; 7900 sq m NFA (sales); and £22.09m turnover.
- Services: 87 units; 3139 sq m GFA
- Vacancies: 16 units; 853 sq m GFA

Figure 4.24 Household Survey: Attitudes to Fraserburgh Town Centre

Fraserburgh TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	2%	2%	4%	28%	9%	9%	2%	0%	4%
Good	9%	20%	29%	47%	45%	45%	20%	28%	51%
Average	36%	40%	41%	23%	14%	11%	36%	35%	26%
Poor	34%	25%	20%	2%	21%	26%	27%	19%	12%
Very Poor	20%	13%	6%	0%	11%	11%	15%	18%	7%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-43%	-16%	8%	74%	21%	17%	-20%	-9%	35%
Balance Rank (of 14)	3	10	13	6	11	10	4	7	8



4.79. In the town centre retail goods shops predominate, particularly for comparison goods. The bulky comparison goods (notably furniture) is particularly important.

4.80. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 72% of national averages.
- General comparison goods densities are below national averages (59%).
- Bulky goods appear to be trading close below average levels (82%).

4.81. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Fraserburgh to trade at levels slightly below national averages. However, even allowing for this, trading levels appear to be below average. This low level of trade and turnover identified from the household survey is not consistent with the low levels of vacancies identified.

Catchment Area and Market Penetration

4.82. Figure 4.25 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Fraserburgh Town Centre and also the levels of market penetration for different goods categories. The figure also summarises other key information for the town centre in 2023 including the location of principal retail frontages. The figure identifies that:

- For Convenience Goods: the centre's PCA comprises Zone 10 (Fraserburgh and adjoining areas) and the SCA extends along the coast into Zone 7 (towards Banff). Market penetration levels in the PCA are between 10% and 30% and less than this in the SCA. Low market penetration reflects the impact of out of centre stores – Tesco and ASDA.
- The PCA for both General Comparison and Bulky Comparison Goods are also Zone 10 but the SCA differs including parts of Zones 7, 11 (Peterhead) and 12 (Mintlaw). Market penetration for general comparison is only 10-30% in the PCA and less elsewhere, however, for bulky goods levels are higher – 30-50% in the PCA and 10-30% in the SCA.

Future Changes in Retail Turnover: Fraserburgh Town Centre

4.83. Figure 4.26 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

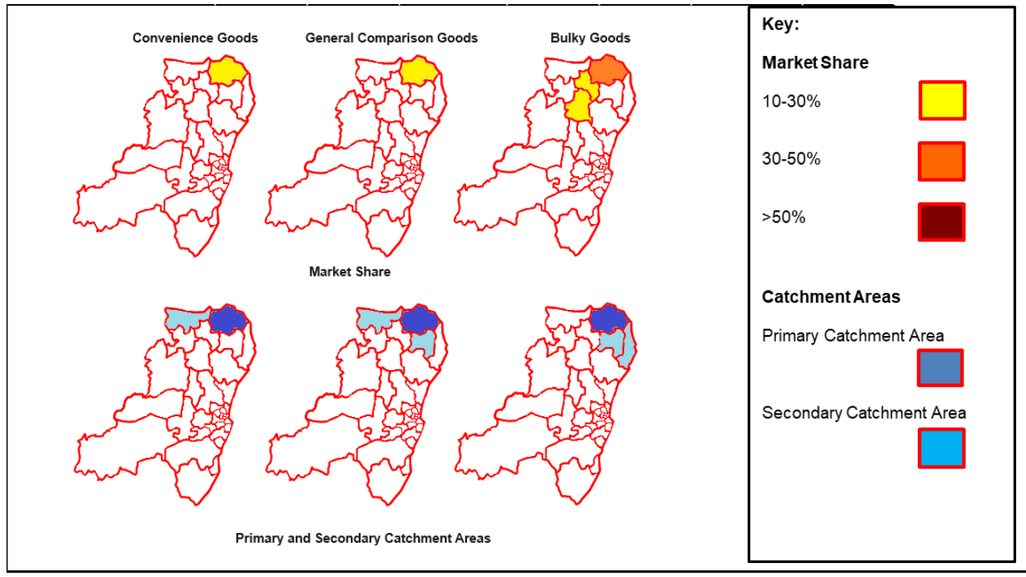
4.84. The principal forecasts are:

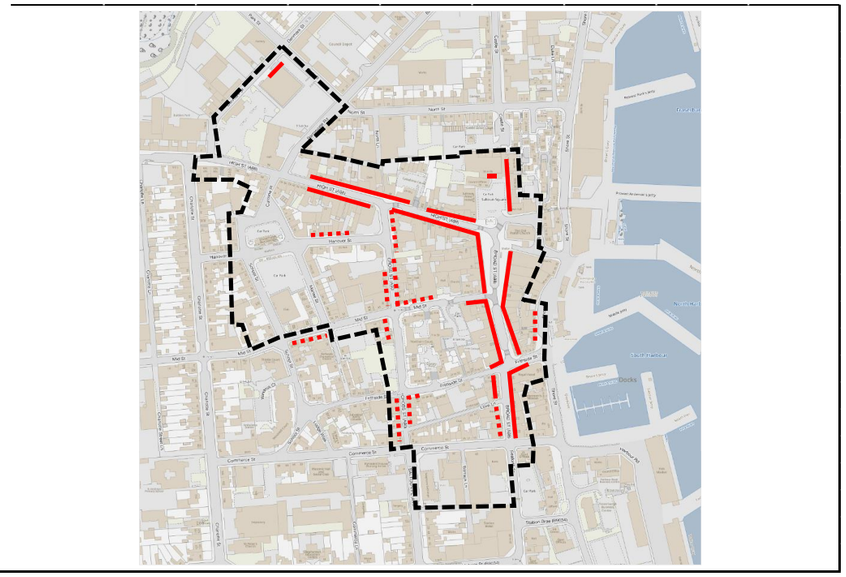
- Decline in convenience goods sales through to 2038 reflecting limited growth in population in the catchment area and flat expenditure growth.
- Significant growth for general comparison and bulky goods turnover, particularly from 2028.

4.85. In overall terms turnover for the town centre is slight decline to 2028 and thereafter significant growth to 2038.

4.86. Sales densities for convenience and comparison goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 4.25: Fraserburgh Town Centre - Key Retail Characteristics





Floorspace and Turnover 2023																
		Convenience				General Comparison				Bulky Goods				All Goods			
	No.	GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover	
		Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m
Total Retail Goods Floorspace	75	3346	2510		16.25	6045	3929		11.50	6110	3971		10.59	15500	10410		38.34
Retail Services	87													3139			
Vacant	16													853			
ALL RETAIL GOODS AND SERVICES	**178**	**3346**	**2510**		**16.25**	**6045**	**3929**		**11.50**	**6110**	**3971**		**10.59**	**19491**			**38.34**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	19	73	39	21	152	£54.69m
2013	19	57	64	23	163	£35.90m
2018					0	
2023	15	60	87	16	178	£38.34m
					change 2013-23	+7%
					change 2004-23	-30%

Vitality and Viability Summary

2023 Household Survey. Positive views expressed for accessibility by private car, public transport, parking and for personal business. Neutral views expressed for bulky goods shopping and leisure. Slightly negative views expressed for personal goods shopping, as an attractive place and negative views for clothes' shopping.

Strengths
Relatively broad range of retail offer although choice for comparison goods can be limited; good independent sector; vacancies below average (9% by no. of units, 4% by floor area) and which has reduced ovr time; strong range of additional retail and related services including leisure.

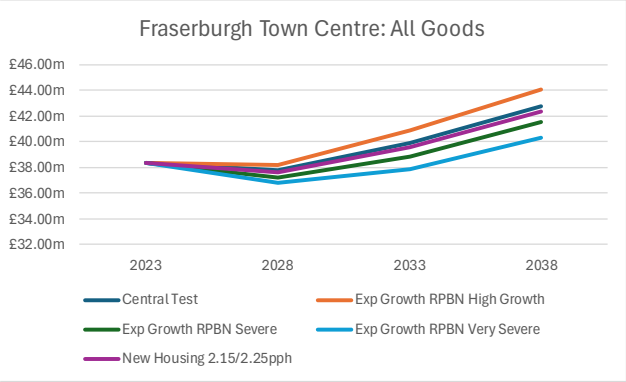
Weaknesses
Negative views regarding comparison goods offer and environmental of town centre; recent decline in turnover; limited multiples in town centre.

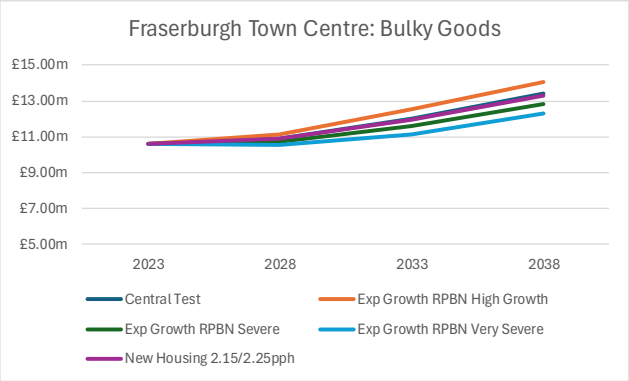
Others
Afater a period of decline to 2013 the town centre appears to have stabilised with vacancies reducing and turnover remaining stable. Mixed views from the household survey about qualitative aspects of the town centre.

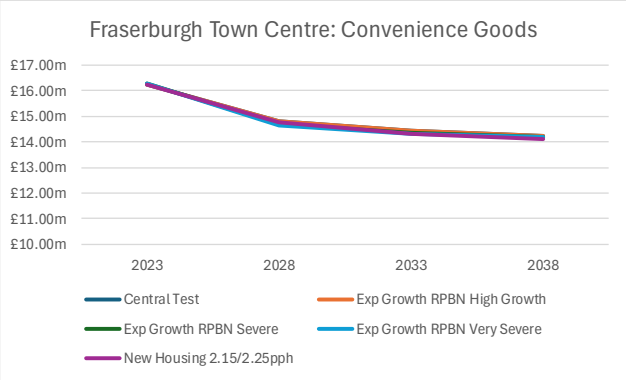
Retail Strategy Summary

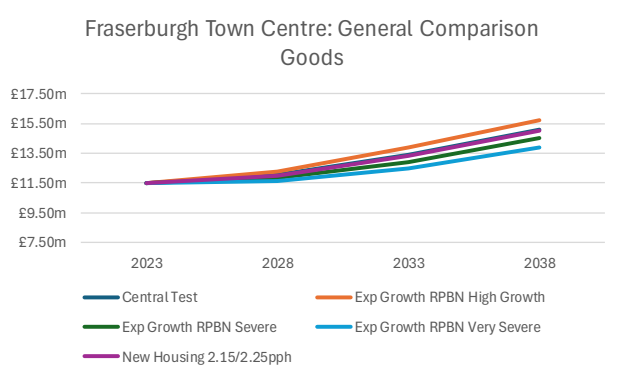
Centre Classification	Principal Town Centre
Planning Policy Approach	Protection Review town centre boundaries
Proposed Retail Floorspace	
Commitments	
Proposals	Additional floorspace to serve OP1 Kirkton and OP2 West of Boothby Road should not threaten town centre.

Figure 4.26 Forecast Future Turnover of Fraserburgh Town Centre





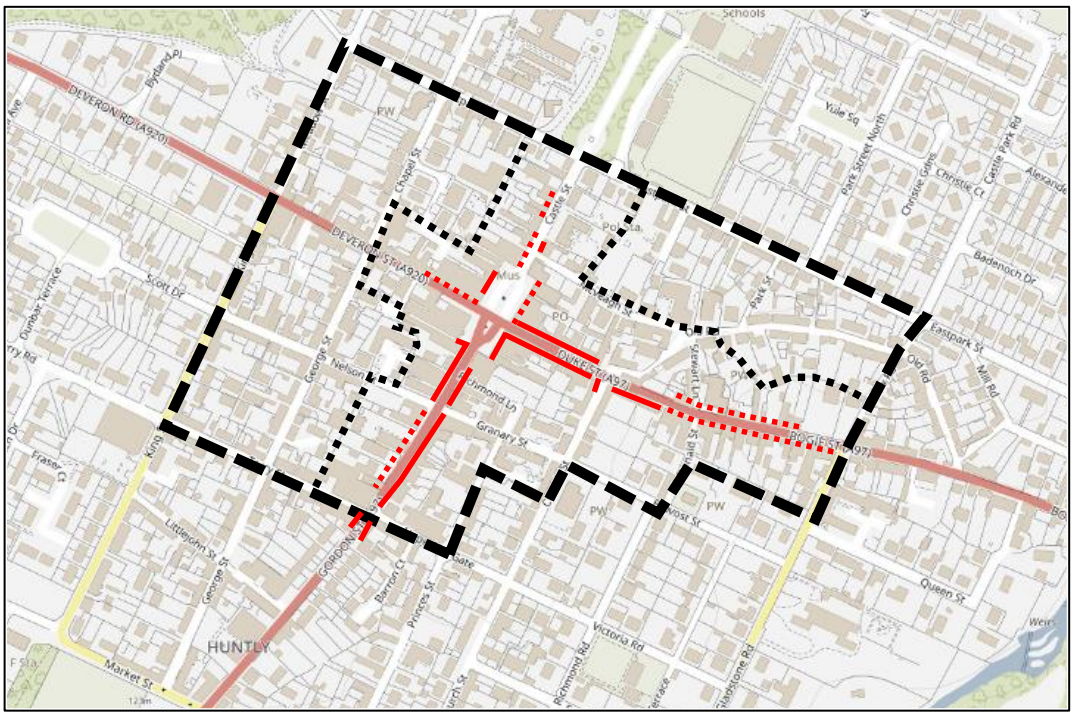




Huntly Town Centre

4.87. Figure 4.27 identifies the extent of Huntly town centre as defined in the LDP.

Figure 4.27. Huntly Town Centre



Space in Use

Numbers of Units by Type

4.88. Figure 4.28 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 4.28: Huntly Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	13	10		4
Comparison	39	37		20
Retail, Leisure + Business Services	25	22		30
Vacant	8	6		23
TOTAL	85	75		77
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	1545	1871		585
Comparison	6360	7040		3651
Retail, Leisure + Business Services	3159	2528		2250
Vacant	510	741		3639
TOTAL	11574	12180		10126

Changes Over Time

4.89. Examination of Figure 4.28 indicates significant trends in changes in provision since 2004 including a significant reduction in numbers and floorspace for both convenience and comparison goods but with some increase in services floorspace. Over the same period there has been a substantial increase in vacant units and floorspace.

Vacancies

Vacancy Rates

4.90. Figure 4.28 also sets out information on vacancies within Huntly town centre. In 2023/24 the vacancy rates were:

- Number of units: 30%
- Floor area: 36%

4.91. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Huntly's town centre's vacancy rate is substantially worse than the UK average by both number of units and floorspace. Vacancy rates in Huntly were the highest of any centre surveyed for the 2023 study.

Changes over Time

4.92. Figure 4.28 indicates that vacancies have increased substantially since 2013.

Additional Facilities/Services

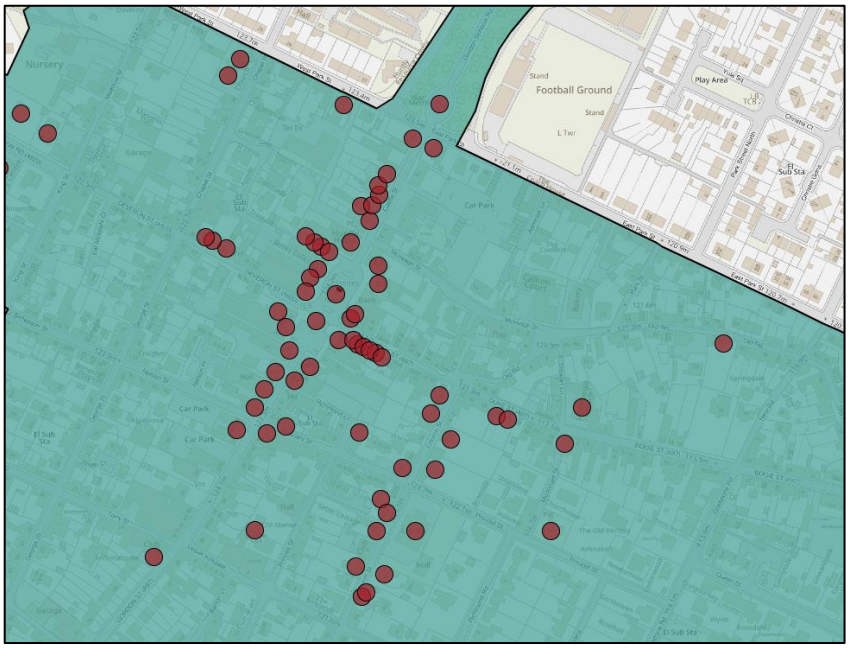
4.93. Huntly provides a range of additional facilities and services in addition to retail/retail services. These include:

- Vet
- Council Service Point
- Stewart Hall
- Library
- Square Deal
- Churches/Places of Worship + halls (3)
- Dentist
- Huntly Travel Hub
- MSP Office
- Police
- Community Centre
- Huntly FC

Heritage

4.94. There are approximately 60 Listed Buildings within/adjacent to the town centre and most of the town centre is included within the Huntly Conservation Area. In addition, close to the town centre, is Huntly Castle which is a designated Scheduled Monument.

Figure 4.29 Huntly Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)



Household Survey Perceptions of the Town Centre

4.95. Figure 4.30 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for both general comparison goods and bulky goods was viewed as generally "very poor".
- Access to the town centre by car and for parking is viewed as "very good" and access by public transport is between "average" and "good".
- The town centre is identified as "average" as a pleasant and attractive place to visit.
- Ratings are "poor" as a place for combining shopping with leisure and "very poor" to combine with personal business.

4.96. In overall terms the town centre was viewed as generally "poor" across all indicators for all the centres included within the survey and this was the 13th ranked centre out of the 14 included in the survey.

Frequency of Visit

4.97. The household survey identified that, for those living within postcode sectors close to Huntly, the average number of visits was once per week. Over 40% of respondents visited the centre at least once per week and only a few (8%) never visited the centre. These figures indicate a mixed role for the centre – some using it as a regular "top-up" destination for shopping and services and others for more occasional visits.

Conclusions

4.98. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally negative picture of the vitality and viability of the centre, taking into account the limited size of the centre:

- Vacancies are very high and have increased significantly since 2013.

- The retail offer within the town centre is limited, particularly for comparison goods.
- The centre provides a range of additional (non-retail) services and facilities.
- Both convenience and comparison floorspace has declined significantly since 2013.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is mixed – parts of the centre have historic interest but it is evident that the high level of vacancies detracts significantly from the environment of the town centre.
- The centre is seen as easy to access by private transport and has reasonable access by public transport.
- Household interview responses provide a generally very negative view of the town centre although residents do regularly visit and use the facilities available within the centre.

Huntly Town Centre: Turnover, Catchment Area and Future Growth

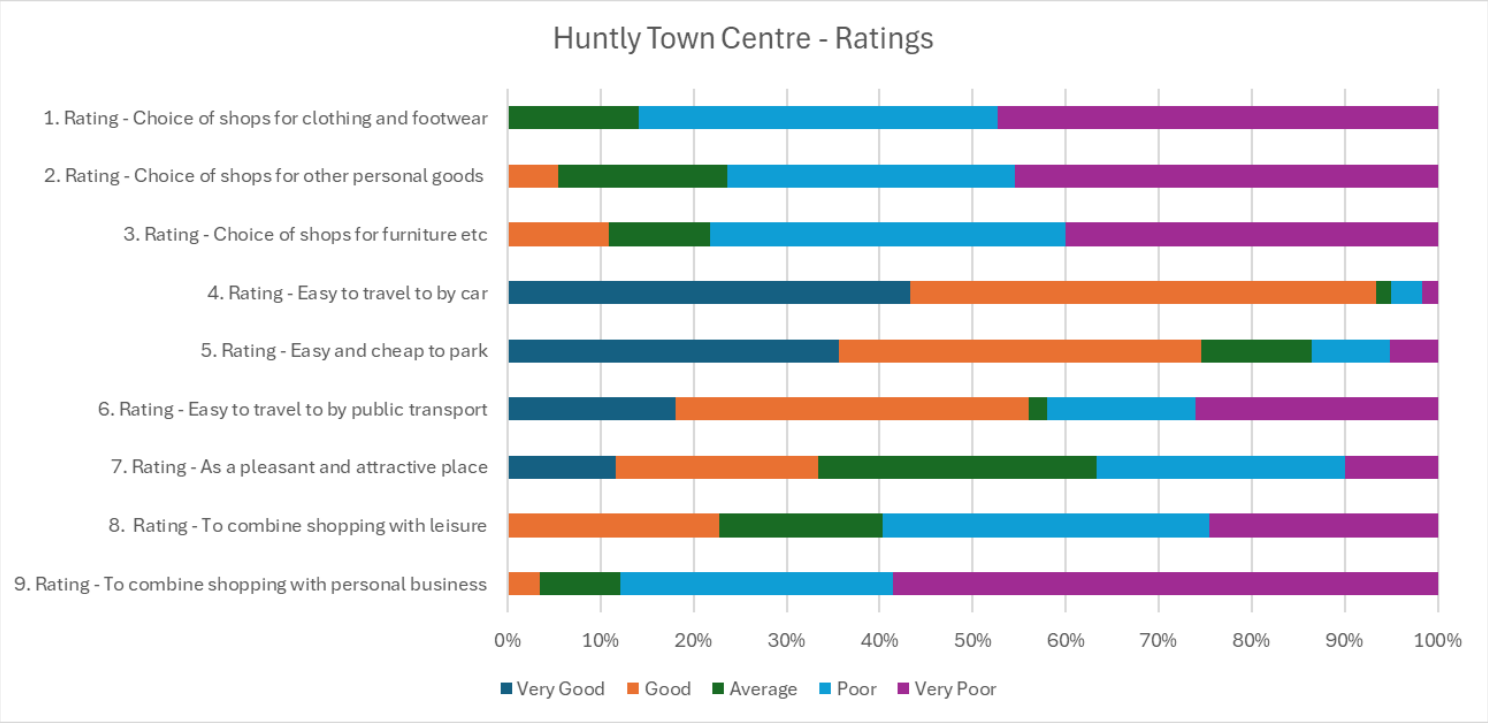
Turnover and Sales Densities

4.99. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 4 units; 585 sq m GFA; 381 sq m NFA (sales); and £3.11 m turnover.
- General Comparison and Bulky Goods: 20 units; 3651 sq m GFA; 2373 sq m NFA (sales); and £5.78m turnover.
- Services: 30 units; 2250 sq m GFA
- Vacancies: 23 units; 3639 sq m GFA

Figure 4.30 Household Survey: Attitudes to Huntly Town Centre

Huntly TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	0%	0%	0%	43%	36%	18%	12%	0%	0%
Good	0%	5%	11%	50%	39%	38%	22%	23%	3%
Average	14%	18%	11%	2%	12%	2%	30%	18%	9%
Poor	39%	31%	38%	3%	8%	16%	27%	35%	29%
Very Poor	47%	45%	40%	2%	5%	26%	10%	25%	59%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-86%	-71%	-67%	88%	61%	14%	-3%	-37%	-84%
Balance Rank (of 14)	14	13	10	7	4	2	12	13	14



4.100. In the town centre no one sector is dominant with space reasonably evenly divided between retail goods shops, services, vacant units and other facilities. There is also a significant amount of residential property included within the defined town centre.

4.101. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 81% of national averages.
- General comparison goods densities are below national averages (47%).
- Bulky goods appear to be trading close below average levels (90%).

4.102. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Huntly to trade at levels slightly below national averages. Taking this into account, apart from very low sales densities for general comparison goods the densities seem reasonable and are not wholly consistent with the high vacancy rate identified.

Catchment Area and Market Penetration

4.103. Figure 4.31 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Huntly Town Centre and also the levels of market penetration for different goods categories. The figure also summarises other key information for the town centre in 2023 including the location of principal retail frontages. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA comprises Zone 4+5 (Huntly and adjoining rural areas). Market penetration rates are very low (significantly less than 10%). This reflects the dominance of the ASDA and Tesco supermarkets.
- The PCA and SCA for both General Comparison and Bulky Comparison Goods are the same – Zone 4+5. Market penetration rates for general comparison goods are slightly above 10% in the PCA but are lower than 10% for bulky goods.

Future Changes in Retail Turnover: Huntly Town Centre

4.104. Figure 4.32 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

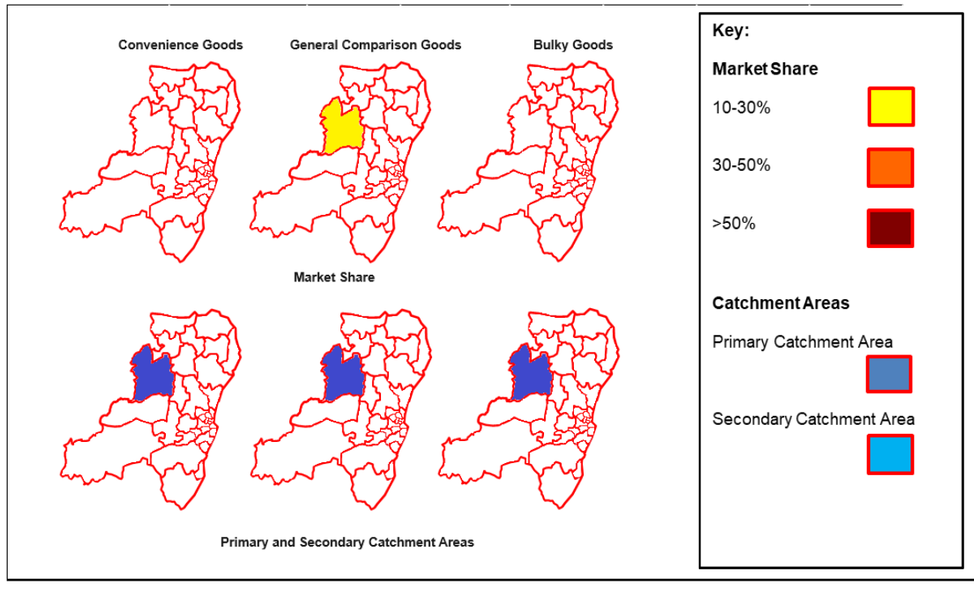
4.105. The principal forecasts are:

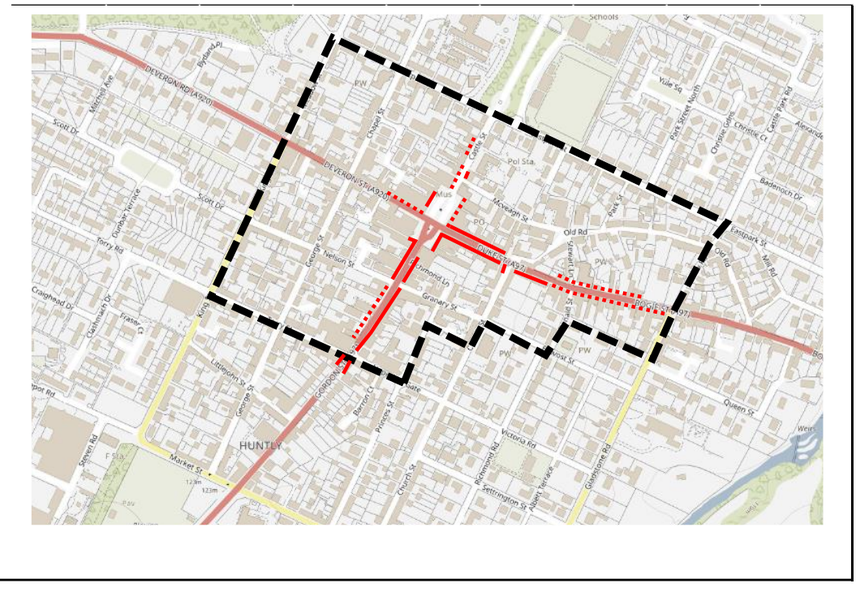
- Slight decline in convenience goods sales through to 2038 reflecting limited growth in population in the catchment area and flat expenditure growth.
- Significant growth for general comparison and slow growth for bulky goods turnover, particularly from 2028.

4.106. In overall terms turnover for the town centre is identified to benefit from steady turnover growth through to 2038.

4.107. Sales densities for convenience and comparison goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 4.31: Huntly Town Centre - Key Retail Characteristics





Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	24	585	381		3.11	3027	1968		4.59	624	405		1.19	4236	2754		8.89
Retail Services	30													2250			
Vacant	23													3639			
ALL RETAIL GOODS AND SERVICES	**77**	**585**	**381**		**3.11**	**3027**	**1968**		**4.59**	**624**	**405**		**1.19**	**10126**			**8.89**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	13	39	25	8	85	£16.30m
2013	10	37	22	6	75	£13.54m
2018					0	
2023	4	20	30	23	77	£8.89m
					change 2013-23	-34%
					change 2004-23	-45%

Vitality and Viability Summary

2023 Household Survey. Strongly positive views identified for accessibility by private car (including parking) and slightly positive views for access by public transport. Neutral views re as an attractive centre. All other categories were strongly negative including choice for all categories of comparison goods shopping, and for leisure and personal business.

Strengths
Strong independent sector and reasonable offer for retail and related services; historic/attractive core.

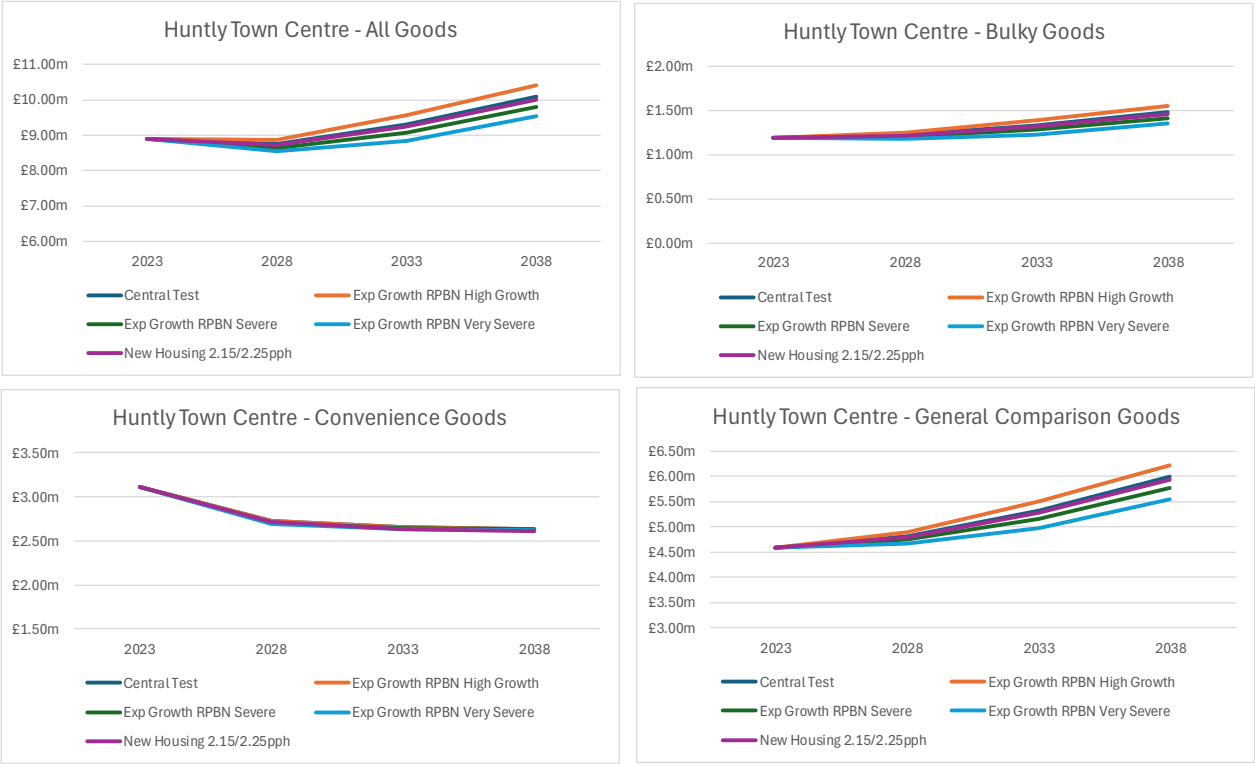
Weaknesses
Centre has suffered significantly decline with high levels of vacancies (30% by number of units and 36% by floorspace). Low levels of satisfaction with centre. Retail dominated by the Tesco and Asda supermarkets. Limited multiples.

Others
Major concern about increase in vacancies since 2013 (additional units reflects amendment to definitions). Particular concentration of vacancies along Bridge Street

Retail Strategy Summary

Centre Classification	Principal Town Centre
Planning Policy Approach	Protection Review town centre boundaries
Proposed Retail Floorspace	
Commitments	
Proposals	

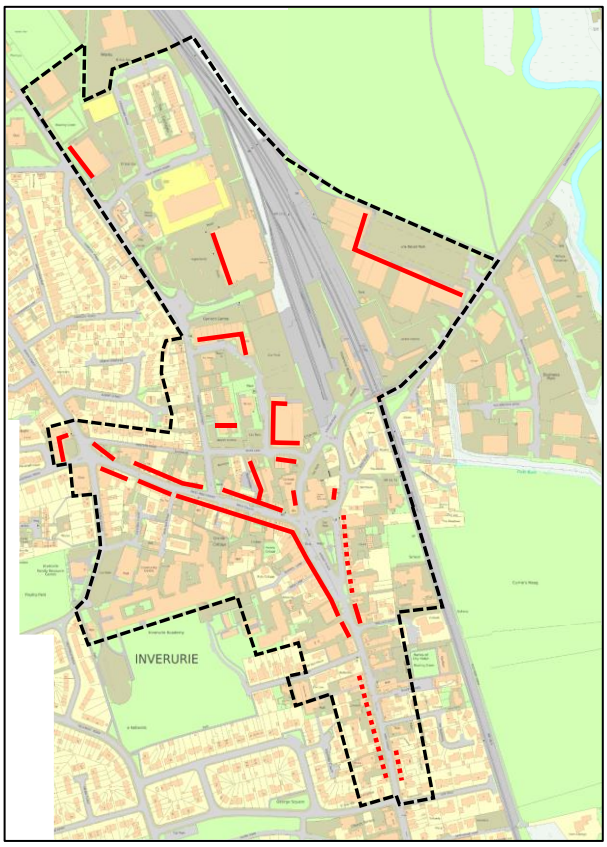
Figure 4.32 Forecast Future Turnover of Huntly Town Centre



Inverurie Town Centre

4.108. Figure 4.33 identifies the extent of Inverurie town centre as defined in the LDP.

Figure 4.33. Inverurie Town Centre



Space in Use

Numbers of Units by Type

4.109. Figure 4.34 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 4.34: Inverurie Town Centre – Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	12	13		22
Comparison	51	61		64
Retail, Leisure + Business Services	46	50		68
Vacant	2	5		6
TOTAL	111	129		160
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	6372	9132		10928
Comparison	13039	24285		27739
Retail, Leisure + Business Services	6497	6626		9261
Vacant	3210			614
TOTAL	29118	40043		48542

Changes Over Time

4.110. Examination of Figure 4.34 indicates significant trends in changes in provision since 2004 including a significant increase in convenience units and floorspace, substantial growth in comparison floorspace (particularly between 2004 and 2013) and a significant increase in retail/leisure/business services. In terms of units vacancies have increased but vacant units are currently small with the result that vacant floorspace has declined.

Vacancies

Vacancy Rates

4.111. Figure 4.34 also sets out information on vacancies within Inverurie town centre. In 2023/24 the vacancy rates were:

- Number of units: 4%
- Floor area: 1%

4.112. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Inverurie town centre's vacancy rate is very low compared to the UK average by both number of units and floorspace. Inverurie has the lowest vacancy rates of all major town/city centres covered in this study.

Changes over Time

4.113. Figure 4.34 indicates that vacancies have remained at a generally low level throughout the period since 2004.

Additional Facilities/Services

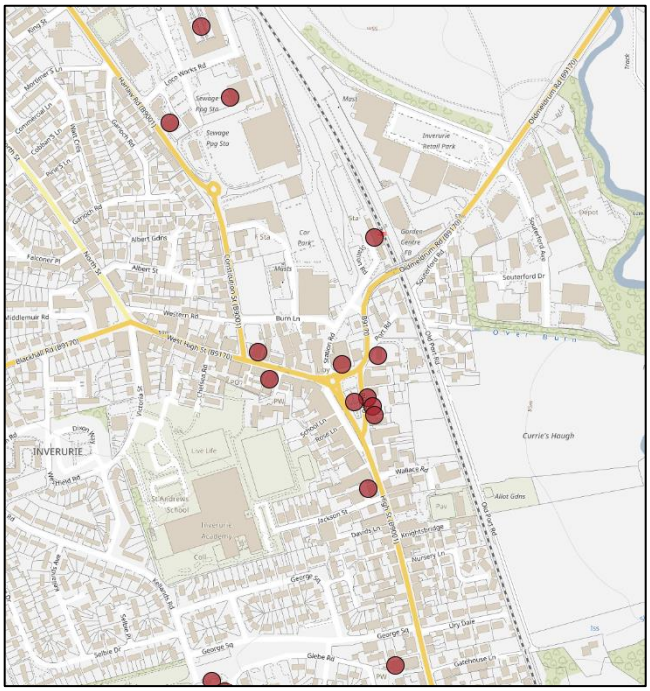
4.114. Inverurie provides a reasonable range of additional facilities and services in addition to retail/retail services. These include:

- Railway station
- Library
- Town hall
- Bowling Club
- Places of worship/churches (3)
- Dentists (4)
- Clinics (4)
- Funeral Directors
- Music School
- Self-Directed Support
- Wyness hall
- Inverurie Community Partnership
- Alcohol and Drugs Action
- Grampian Opportunities
- Fire station
- Skills Development Scotland

Heritage

4.115. There are approximately 13 Listed Buildings within/adjacent to the town centre. No part of the centre is within or adjacent to a Conservation area.

Figure 4.35 Inverurie Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)



Household Survey Perceptions of the Town Centre

4.116. Figure 4.36 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for both general comparison goods and bulky goods was viewed as between "good" and "very good" (positive views of between +30% and +41%).
- Access to the town centre by car and for parking is viewed as "very good" and access by public transport is between "average" and "good".
- The town centre is identified as "average" as a pleasant and attractive place to visit.
- Ratings are "good" to "very good" as a place for combining shopping with leisure and to combine with personal business.

4.117. In overall terms the town centre was viewed as generally "good" to "very good" across all indicators for all the centres included within the survey and this was the top ranked centre out of the 14 included in the survey.

Frequency of Visit

4.118. The household survey identified that, for those living within postcode sectors close to Inverurie, the average number of visits was between one and two per week. Almost half (47%) respondents visited the centre at least once per week and only a few (9%) never visited the centre. These figures indicate a mixed role for the centre – some using it as a regular "top-up" destination for shopping and services and others for main shopping and other activity requirements.

Conclusions

4.119. Based on the surveys undertaken it is evident that the vitality and viability indicators present a very positive picture of the vitality and viability of the centre.

- Vacancies are very low and have declined since 2004.

- The retail offer within the town centre is broad with a significant number of national multiples. Given the limited size of the centre (in national terms) the range in choice for shops can be limited for certain types of goods but the average size of units is relatively large allowing a wider selection of goods within individual stores.
- The centre provides a mixture of major brands in large units and independent shops for both convenience and comparison categories of goods.
- The centre provides good a range of additional (non-retail) services and facilities.
- Both convenience and comparison floorspace has grown significantly since 2008.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is mixed – parts of the centre have some historic interest but the design quality in the northern and retail park sections of the town are adversely affected by the dominance of the private car.
- The centres is seen as easy to access by private transport and has reasonable access by public transport.
- Household interview responses provide a generally very positive view of the town centre with residents regularly visiting and using the facilities available within the town centre.

Inverurie Town Centre: Turnover, Catchment Area and Future Growth

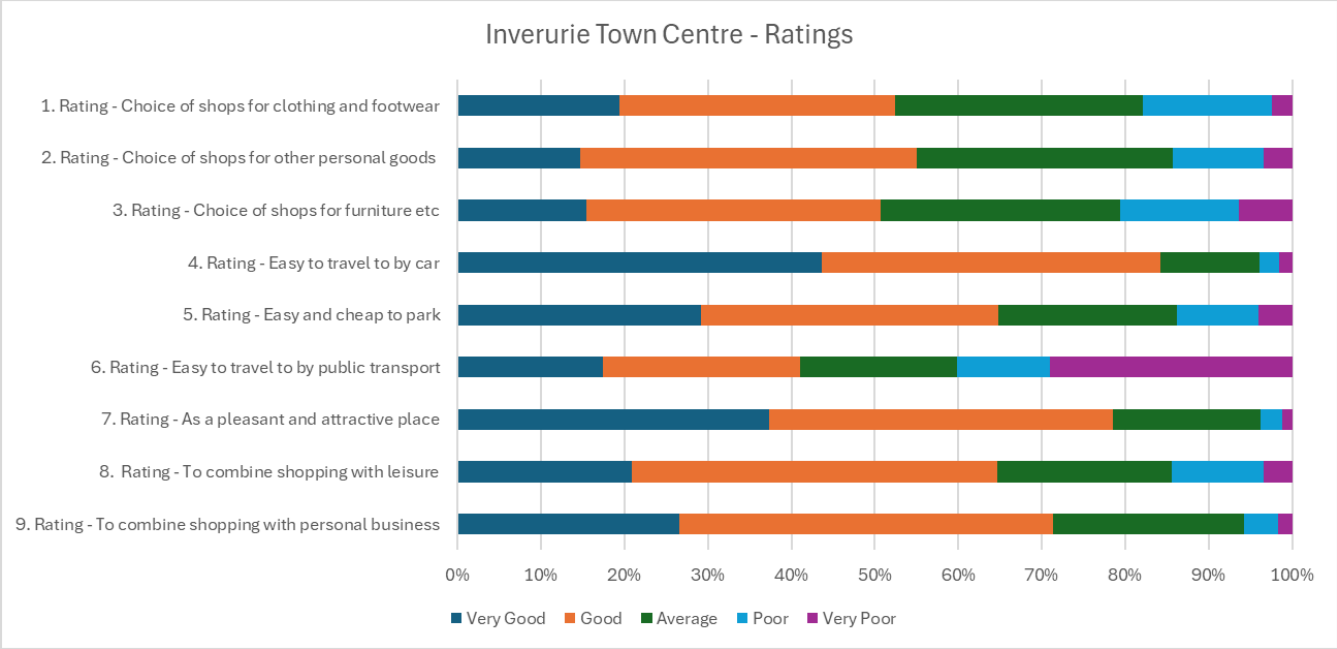
Turnover and Sales Densities

4.120. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 22 units; 10928 sq m GFA; 7789 sq m NFA (sales); and £78.97 m turnover.
- General Comparison and Bulky Goods: 64 units; 27739 sq m GFA; 19268 sq m NFA (sales); and £99.82m turnover.
- Services: 68 units; 9261 sq m GFA
- Vacancies: 6 units; 614 sq m GFA

Figure 4.36 Household Survey: Attitudes to Inverurie Town Centre

Inverurie TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	19%	15%	15%	44%	29%	17%	37%	21%	27%
Good	33%	40%	35%	41%	36%	24%	41%	44%	45%
Average	30%	31%	29%	12%	21%	19%	18%	21%	23%
Poor	15%	11%	14%	2%	10%	11%	3%	11%	4%
Very Poor	2%	3%	6%	2%	4%	29%	1%	3%	2%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	35%	41%	30%	80%	51%	1%	75%	50%	66%
Balance Rank (of 14)	1	1	1	7	6	12	2	1	1



4.121. In the town centre no one sector is dominant with space reasonably evenly divided between retail goods shops, services, vacant units and other facilities.

4.122. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 107% of national averages.
- General comparison goods densities are close to national averages (98%).
- Bulky goods appear to be trading slightly above average levels (113%).

4.123. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Inverurie to trade at levels slightly below national averages. Taking this into account, the sales densities identified are very healthy and are consistent with the very low vacancy rate identified.

Catchment Area and Market Penetration

4.124. Figure 4.37 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Inverurie Town Centre and also the levels of market penetration for different goods categories. The figure also summaries other key information for the town centre in 2023 including the location of principal retail frontages. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA are quite extensive serving a significant part of Aberdeenshire. The PCA comprises zones 15 and 16 (Oldmeldrum, Inverurie, Kemnay and Kintore area) and the SCA extends westwards to include rural areas in zones 4+5 and 9. Market penetration rates are high with >50% within the PCA and 10-50% for the rural areas to the west, north and north east.
- The PCA and SCA for both General Comparison and Bulky Comparison Goods are broadly similar to those identified for convenience goods although the household survey did identify significant flows from zone 14 (Newburgh) which is included in the SCA for bulky goods. Market penetration rates for both general and bulky comparison goods are high at with rates above 30% and 50% for significant parts of Aberdeenshire.

4.125. These catchment areas and market penetration rates are significantly greater than for any other town centre in Aberdeenshire which emphasises that Inverurie is increasing in importance and acting as a sub-regional centre for Aberdeenshire.

Future Changes in Retail Turnover: Inverurie Town Centre

4.126. Figure 4.38 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

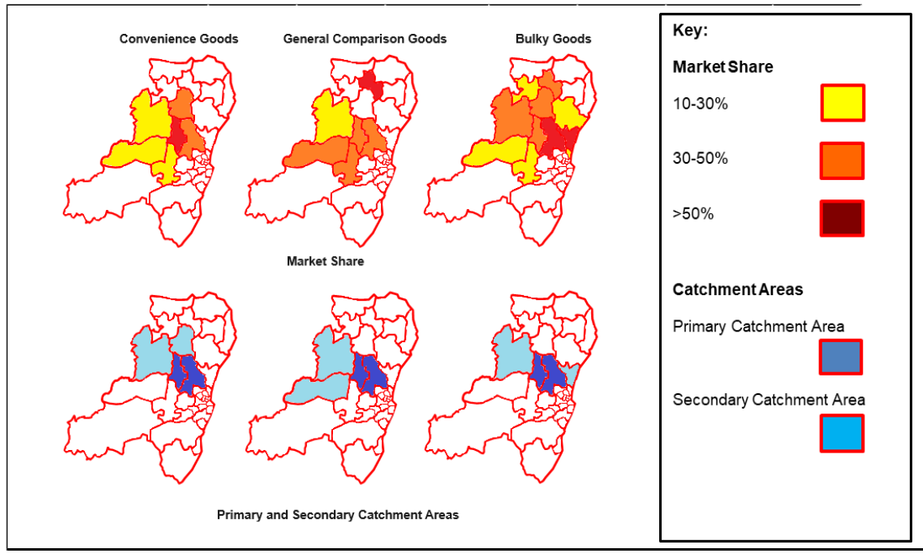
4.127. The principal forecasts are:

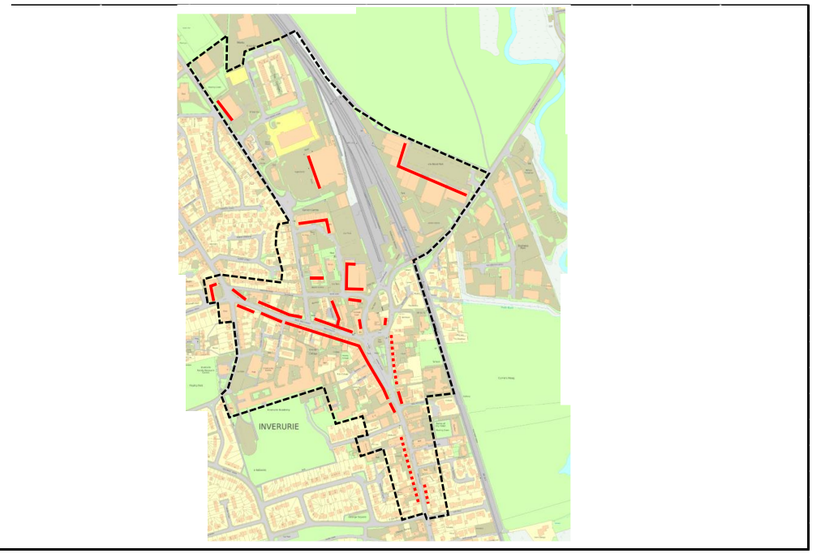
- Strong growth for convenience goods to 2028 reflecting population growth within the PCA and, thereafter, slower growth to 2038.
- Slow growth for general comparison and bulky goods turnover to 2028 accelerating from 2038 to 2038.

4.128. In overall terms turnover for the town centre is identified to benefit from significant turnover growth through to 2038.

4.129. Sales densities for convenience and comparison goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 4.37: Inverurie Town Centre - Key Retail Characteristics





Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	86	10928	7789		78.97	15217	9876		62.04	12522	9391		37.78	38667	27056		178.79
Retail Services	68													9261			
Vacant	6													614			
ALL RETAIL GOODS AND SERVICES	**160**	**10928**	**7789**		**78.97**	**15217**	**9876**		**62.04**	**12522**	**9391**		**37.78**	**48542**			**178.79**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	12	51	46	2	111	£94.54m
2013	13	61	50	5	129	£131.43m
2018					0	
2023	22	64	68	6	160	£178.79m
					change 2013-23	+36%
					change 2004-23	+89%

Vitality and Viability Summary

2023 Household Survey. Positive views expressed for all categories of comparison goods shopping, for accessibility by private car and parking, as an attractive place and for undertaking personal business and leisure activities. Neutral views expressed about accessibility by public transport. No significant negative views from responses as a whole.

Strengths

Wide retail offer with both independents and wide range of national multiples in a range of types of unit. Vacancies have remained significantly below national averages (4% by number of units and only 1% by floorspace). Very positive household survey views of the town centre.

Weaknesses

The principal weaknessof the town centre is design related - i.e. lack of easy integration for pedestrians between parts of the TC - from the High Street to Tesco and to the retail park.

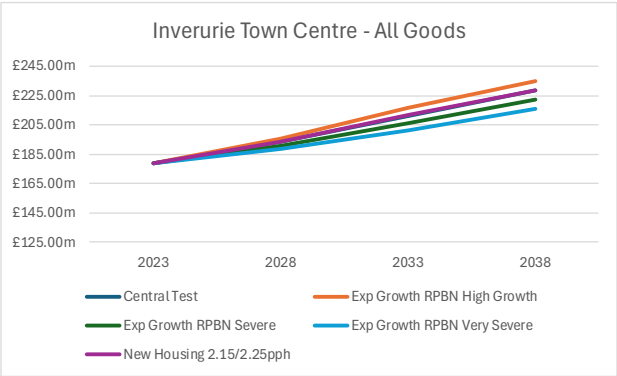
Others

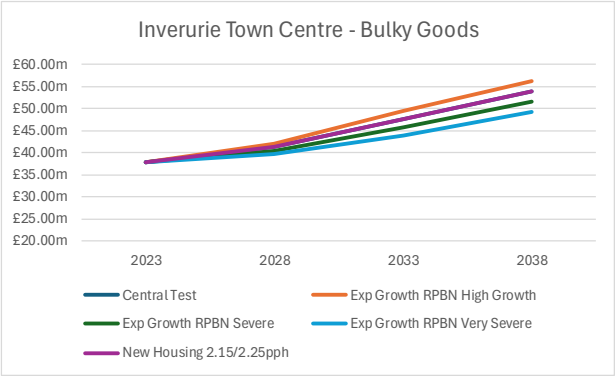
The key feature of Inverurie is its growing dominance in Aberdeenshire compared to other town centres with the result that it has developed a clear sub-regional function with a significantly greater turnover and floorspace (but not by no. of units) than other town centres. Turnover has increased rapidly and vacancies remained very low.

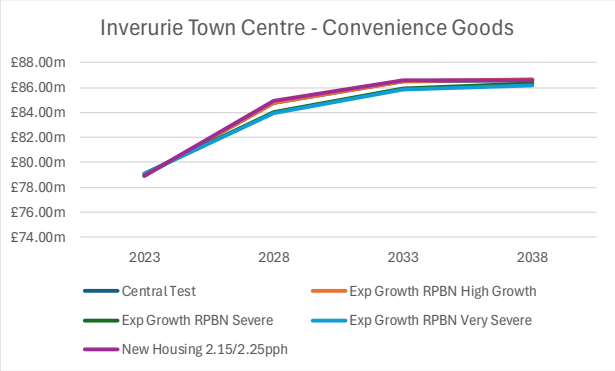
Retail Strategy Summary

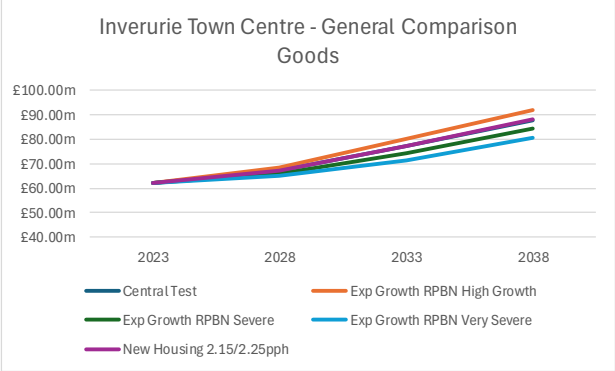
Centre Classification	Principal Town Centre - Sub regional centre?
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	Additional floorspace to serve OP5 Crichie should not threaten town centre.

Figure 4.38 Forecast Future Turnover of Inverurie Town Centre





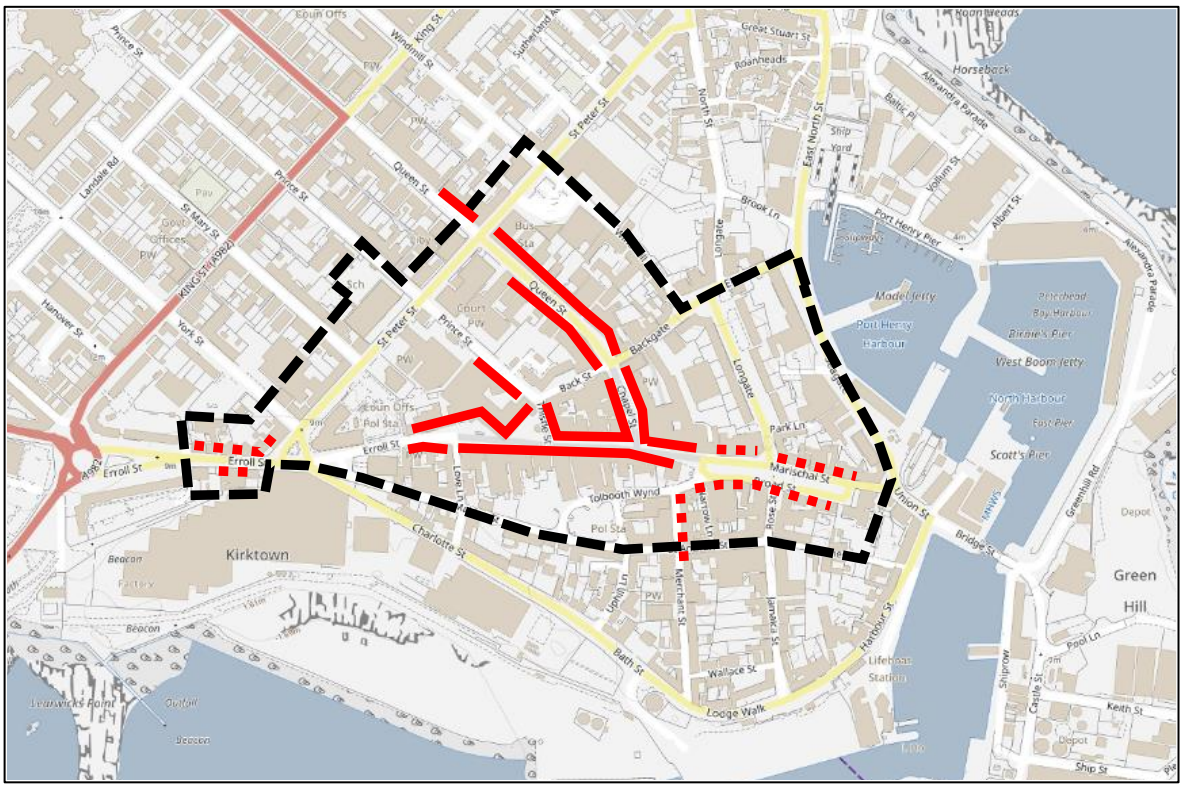




Peterhead Town Centre

4.130. Figure 4.39 identifies the extent of Peterhead town centre as defined in the LDP.

Figure 4.39. Peterhead Town Centre



Space in Use

Numbers of Units by Type

4.131. Figure 4.40 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 4.40: Peterhead Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	11	14		23
Comparison	70	69		66
Retail, Leisure + Business Services	53	60		95
Vacant	24	15		19
TOTAL	158	158		203
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	1473	3492		4842
Comparison	14725	14493		16182
Retail, Leisure + Business Services	6758	8331		9770
Vacant	3171	1573		1907
TOTAL	26127	27889		32702

Changes Over Time

4.132. Examination of Figure 4.40 indicates significant trends in changes in provision since 2004 including a significant increase in convenience units and floorspace, slight reduction in comparison goods units but slight growth in floorspace and a significant increase in retail/leisure/business services. The latter will, in part, reflect changes in definitions in Experian Goad surveys. In terms of units vacancies have increased slightly since 2013 but remain lower than identified in 2004.

Vacancies

Vacancy Rates

4.133. Figure 4.40 also sets out information on vacancies within Peterhead town centre. In 2023/24 the vacancy rates were:

- Number of units: 9%
- Floor area: 6%

4.134. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Peterhead town centre's vacancy rate is below the UK average by both number of units and, in particular, in terms of floorspace.

Changes over Time

4.135. Figure 4.40 indicates that vacancies in both 2013 and 2023 are lower than identified in 2004.

Additional Facilities/Services

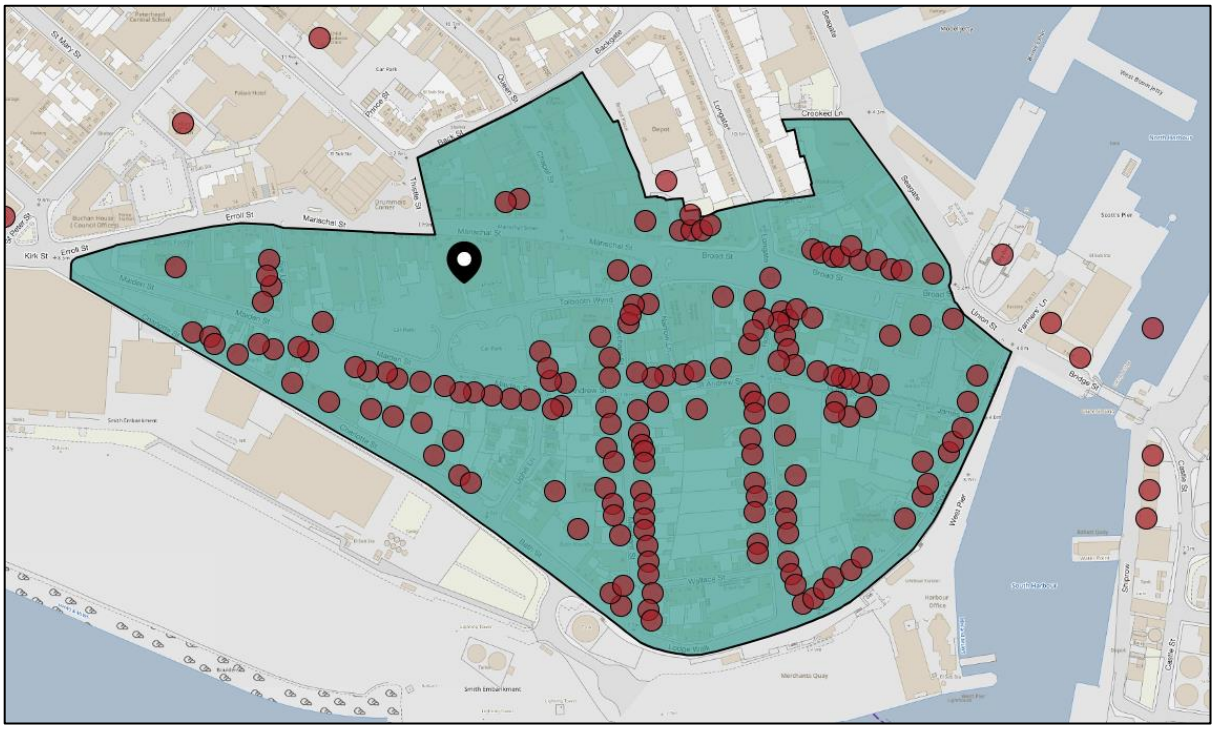
4.136. Peterhead provides a wide range of additional facilities and services in addition to retail/retail services. These include:

- Police
- Foyer (employment/training) (2)
- Dance company/academy/schools (2)
- Fisherman's Mission
- Buchan radio
- Churches/places of worship (5)
- Apex centre
- Town House
- Citizens Advice Bureau
- Skills Development Scotland
- MSP Office
- Clinic
- Taxi offices (2)
- Sherriff Court
- Dentist
- Cornerstone
- Library
- Primary School

Heritage

4.137. There are approximately 165 Listed Buildings within/adjacent to the town centre. Most of the town centre is included within the Peterhead Central Conservation Area. In addition, although essentially industrial in character, the proximity of the North and South Harbours to the town centre positively contributes to the environment and character of the town centre.

Figure 4.41 Peterhead Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)



Household Survey Perceptions of the Town Centre

4.138. Figure 4.42 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for both general comparison goods and bulky goods was viewed as between "poor" and "very poor" (positive views of between -29% and -62%).
- Access to the town centre by car and for parking is viewed as "very good" and access by public transport is between "average" and "good".
- The town centre is identified as "poor" to "very poor" as a pleasant and attractive place to visit.
- Ratings are "poor" as a place for combining shopping with leisure but "good" to combine with personal business.

4.139. In overall terms the town centre was viewed as generally "average" across all indicators for all the centres included within the survey and the centre was ranked 7th centre out of the 14 included in the survey.

Frequency of Visit

4.140. The household survey identified that, for those living within postcode sectors close to Peterhead, the average number of visits was slightly less than once per week – this was the least visited of all town centres in Aberdeenshire. Almost one third (32%) respondents visited the centre at least once per week, however, 13% responded that they never visited the centre. These figures indicate a mixed role for the centre – some using it as a regular "top-up" destination for shopping and services and others for main shopping and other activity requirements.

Conclusions

4.141. Based on the surveys undertaken it is evident that the vitality and viability indicators present a mixed picture of the vitality and viability of the centre.

- Vacancies are low and have remained below the national average for a significant period of time.
- The retail offer within the town centre is broad with a significant number of national multiples. There is, however, a generally limited choice for many categories of goods, particularly comparison goods shopping.
- The centre provides a good range of additional (non-retail) services and facilities.
- Both convenience and comparison floorspace have grown slightly since 2013.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is mixed – significant parts of the centre have historic interest and are included within the Conservation Area and significant areas provide a safe pedestrian environment, however, the household survey identified significantly negative views about the attractiveness of the town centre.
- The centres is seen as easy to access by private transport and has reasonable access by public transport.
- Household interview responses provide a generally negative view of the town centre with residents visiting less than once per week on average.

Peterhead Town Centre: Turnover, Catchment Area and Future Growth

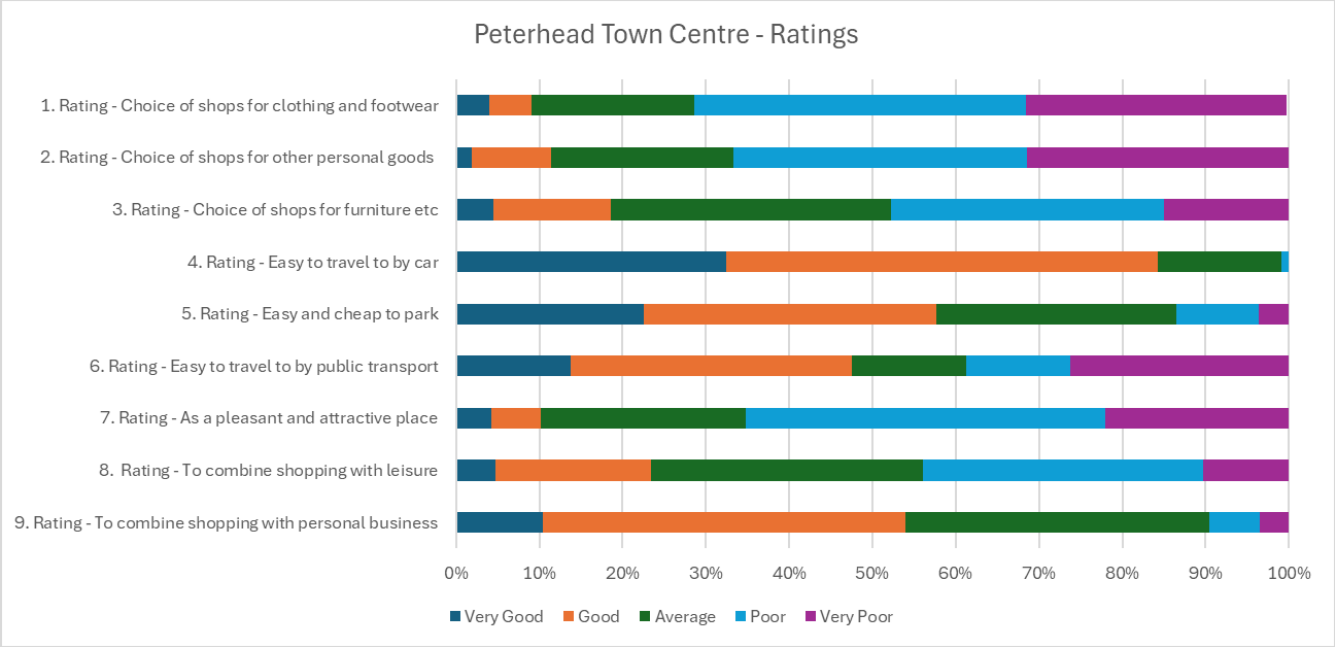
Turnover and Sales Densities

4.142. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 23 units; 4842 sq m GFA; 3632 sq m NFA (sales); and £21.07 m turnover.
- General Comparison and Bulky Goods: 66 units; 16182 sq m GFA; 10519 sq m NFA (sales); and £34.04m turnover.
- Services: 95 units; 9770 sq m GFA
- Vacancies: 19 units; 1907 sq m GFA

Figure 4.42 Household Survey: Attitudes to Peterhead Town Centre

Peterhead TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	4%	2%	4%	32%	23%	14%	4%	5%	10%
Good	5%	10%	14%	52%	35%	34%	6%	19%	43%
Average	19%	22%	34%	15%	29%	14%	25%	33%	37%
Poor	40%	35%	33%	1%	10%	13%	43%	34%	6%
Very Poor	31%	31%	15%	0%	4%	26%	22%	10%	3%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-62%	-55%	-29%	83%	44%	9%	-55%	-21%	44%
Balance Rank (of 14)	11	12	7	5	9	10	14	11	2



4.143. In the town centre no one sector is dominant with space reasonably evenly divided between retail goods shops, services, vacant units and other facilities.

4.144. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods sales densities are identified to be, in 2023, at only 64% of national averages.
- General comparison goods densities are below to national averages (73%).
- Bulky goods appear to be trading slightly below average levels (82%).

4.145. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Peterhead to trade at levels slightly below national averages. However, the sales densities identified are relatively weak and are not wholly consistent with the relatively low vacancy level observed.

Catchment Area and Market Penetration

4.146. Figure 4.43 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Peterhead Town Centre and also the levels of market penetration for different goods categories. The figure also summaries other key information for the town centre in 2023 including the location of principal retail frontages. The figure identifies that:

- For Convenience Goods: the centre's PCA comprises zone 11 (Peterhead) and SCA zone 12 (Mintlaw area). Market penetration rates in both the PCA and SCA are between 10% and 30%.
- The PCA and SCA for both General Comparison and Bulky Comparison Goods are similar to those identified for convenience goods although the household survey did identify significant flows from zone 10 (Fraserburgh) which is included in the SCA for bulky goods. Market penetration rates for both general and bulky comparison goods with the PCA are 30%-50% and 10-30% in the SCAs.

Future Changes in Retail Turnover: Peterhead Town Centre

4.147. Figure 4.44 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

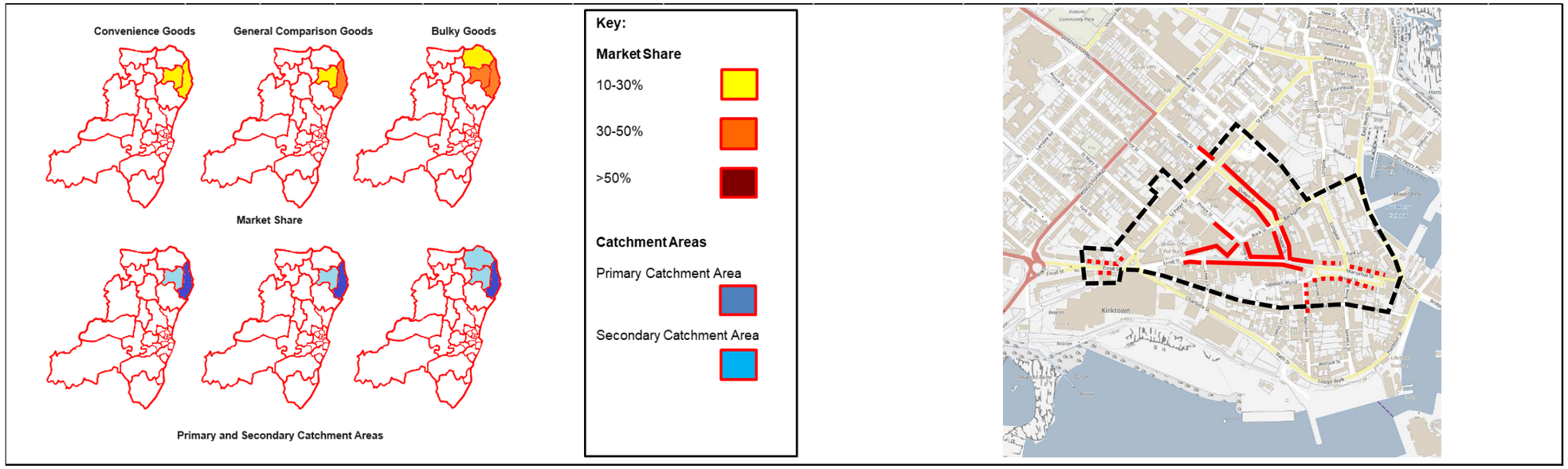
4.148. The principal forecasts are:

- Slow decline in turnover for convenience goods to 2028 and broadly flat thereafter to 2038.
- Slow growth for general comparison and bulky goods turnover to 2028 and slightly faster accelerating from 2028 to 2038.

4.149. In overall terms turnover for the town centre is identified to benefit from flat turnover to 2028 and growth thereafter through to 2038.

4.150. Sales densities for convenience and comparison goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 4.43: Peterhead Town Centre - Key Retail Characteristics



Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	89	4842	3632		21.07	9414	6119		22.30	6768	4399		11.74	21025	14150		55.11
Retail Services	95													9770			
Vacant	19													1907			
ALL RETAIL GOODS AND SERVICES	**203**	**4842**	**3632**		**21.07**	**9414**	**6119**		**22.30**	**6768**	**4399**		**11.74**	**32702**			**55.11**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	11	70	53	24	158	£41.47m
2013	14	69	60	15	158	£39.30m
2018					0	
2023	23	66	95	19	203	£55.11m
					change 2013-23	+40%
					change 2004-23	+33%

Vitality and Viability Summary

2023 Household Survey. Positive views expressed for accessibility by private car, parking and for personal business. Neutral views expressed for public transport access. Negative views expressed for all categories of comparison goods shopping, for leisure and as an attractive place.

Strengths
Relatively broad range of retail offer although choice for comparison goods can be limited; good independent sector; vacancies below average (9% by no. of units, 6% by floor area) and which has reduced over time; strong range of additional retail and related services.

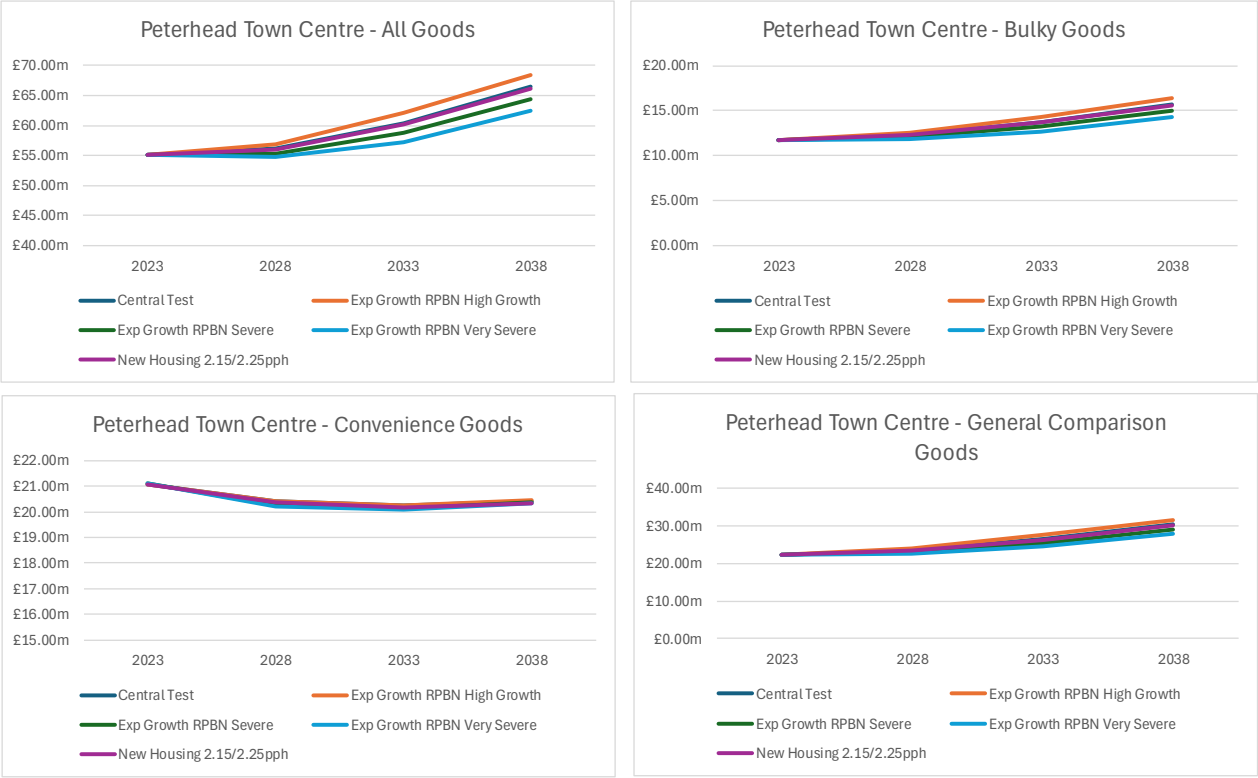
Weaknesses
Negative views regarding comparison goods offer and environment of town centre; recent decline in turnover; limited multiples in town centre.

Others
The town centre presents a relatively stable picture since 2004 with steady growth in turnover and vacancies remaining at broadly constant level.

Retail Strategy Summary

Centre Classification	Principal Town Centre
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	No specific proposals for Buchan Gateway but allocation would permit additional floorspace that could affect town centre (depending on scale and type forthcoming)
Proposals	Additional floorspace to serve OP1 Inverugie Meadows should not threaten town centre.

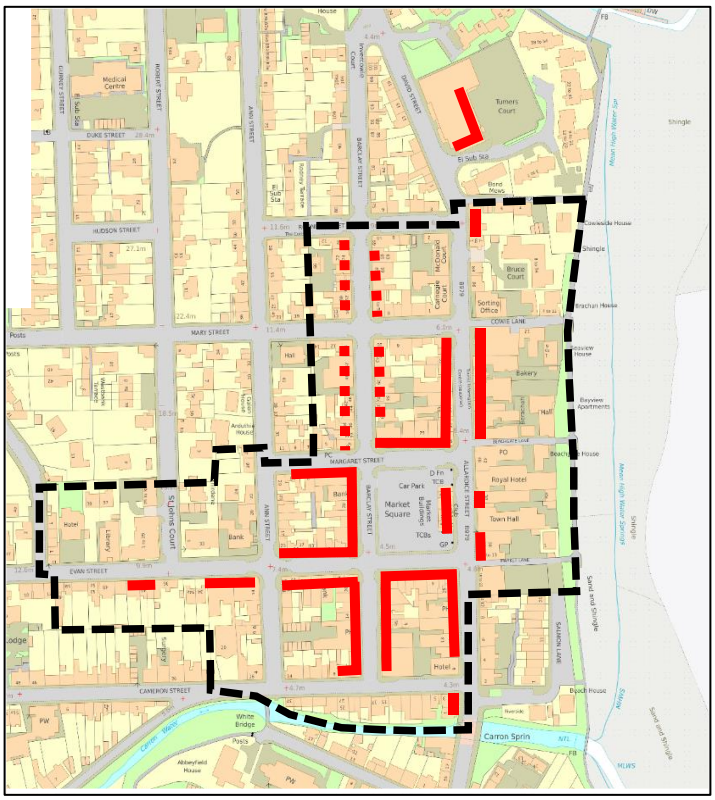
Figure 4.44 Forecast Future Turnover of Peterhead Town Centre



Stonehaven Town Centre

4.151. Figure 4.45 identifies the extent of Stonehaven town centre as defined in the LDP.

Figure 4.45. Stonehaven Town Centre



Space in Use

Numbers of Units by Type

4.152. Figure 4.46 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 4.46: Stonehaven Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	14	15		13
Comparison	39	35		41
Retail, Leisure + Business Services	37	47		66
Vacant	10	4		4
TOTAL	100	101		124
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	2057	2372		1624
Comparison	4424	3899		4218
Retail, Leisure + Business Services	3689	4608		5369
Vacant	594	435		232
TOTAL	10764	11314		11443

Changes Over Time

4.153. Examination of Figure 4.46 indicates some changes in the overall provision since 2004. The number of convenience units has remained broadly similar but floorspace has reduced whereas there has been an increase in comparison units and floorspace. The figure also identifies a significant increase in service units although this is primarily a result of the extension to the range of units included as service in Experian Goad surveys. Vacancies have remained at a low level since 2013.

Vacancies

Vacancy Rates

4.154. Figure 4.46 also sets out information on vacancies within Stonehaven town centre. In 2023/24 the vacancy rates were:

- Number of units: 3%
- Floor area: 2%

4.155. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Stonehaven town centre's vacancy rate is very low compared to the UK average by both number of units and floorspace. Along with Inverurie this is one of the lowest vacancy rates identified for principal town centres in the survey.

Changes over Time

4.156. Figure 4.46 indicates that vacancies in both 2013 and 2023 are lower than identified in 2004.

Additional Facilities/Services

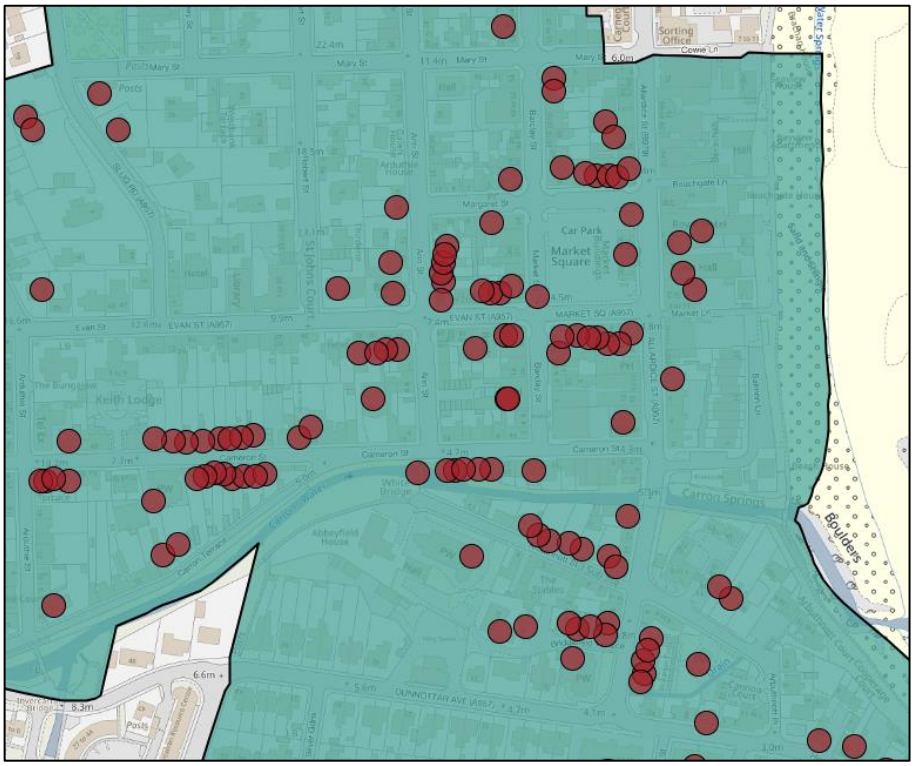
4.157. Stonehaven provides a range of additional facilities and services in addition to retail/retail services. These include:

- Library
- Playhouse
- Dentist
- Education Centre
- Funeral Director
- Town Hall
- Royal British legion/club
- Church/place of worship
- Clinic
- GPO delivery/sorting/collection office
- Cornerstone

Heritage

4.158. There are approximately 65 Listed Buildings within/adjacent to the town centre. The whole of the town centre is included within the Stonehaven Conservation Area. In addition the central focus of the town square contributes to the environmental quality of the town centre as does its close proximity to the sea front.

Figure 4.47 Stonehaven Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)



Household Survey Perceptions of the Town Centre

4.159. Figure 4.48 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for both general comparison goods and bulky goods was viewed as generally "very poor" (positive views of between -43% and -70%).
- Access to the town centre by car and for parking is viewed as "very good" and access by public transport is between "average" and "good".
- The town centre is identified as "very good" as a pleasant and attractive place to visit.
- Ratings are close to "average" for both as a place for combining shopping with leisure and with personal business.

4.160. In overall terms the town centre was viewed as generally "average" across all indicators for all the centres included within the survey and the centre was ranked 10th centre out of the 14 included in the survey. The principal reason for the low ranking was the perception of the centre as poor for comparison goods shopping.

Frequency of Visit

4.161. The household survey identified that, for those living within postcode sectors close to Stonehaven, the average number of visits was slightly more than once per week. Slightly more than 40% (43%) of respondents visited the centre at least once per week and 19% never visited the centre. These figures indicate a mixed role for the centre – some using it as a regular "top-up" destination for shopping and services and others for other activity requirements.

Conclusions

4.162. Based on the surveys undertaken it is evident that the vitality and viability indicators present a mixed picture of the vitality and viability of the centre.

- Vacancies are very low and have remained below the national average for a significant period of time.
- The retail offer within the town centre is generally limited – many of the Goad categories of retail unit are found in the town centre but choices are limited. There are relatively few multiples in the town centre and none for clothing goods.
- The centre provides a reasonable range of additional (non-retail) services and facilities.
- Retail goods floorspace has remained broadly constant since 2013 (decrease in convenience and increase in comparison).
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is high – significant parts of the centre have historic interest and are included within the Conservation Area and other factors contribute to the environmental quality of the centre.
- The centre is seen as easy to access by private transport and has reasonable access by public transport.
- Household interview responses provide a generally average view of the town centre with residents visiting slightly more than once per week on average.

Stonehaven Town Centre: Turnover, Catchment Area and Future Growth

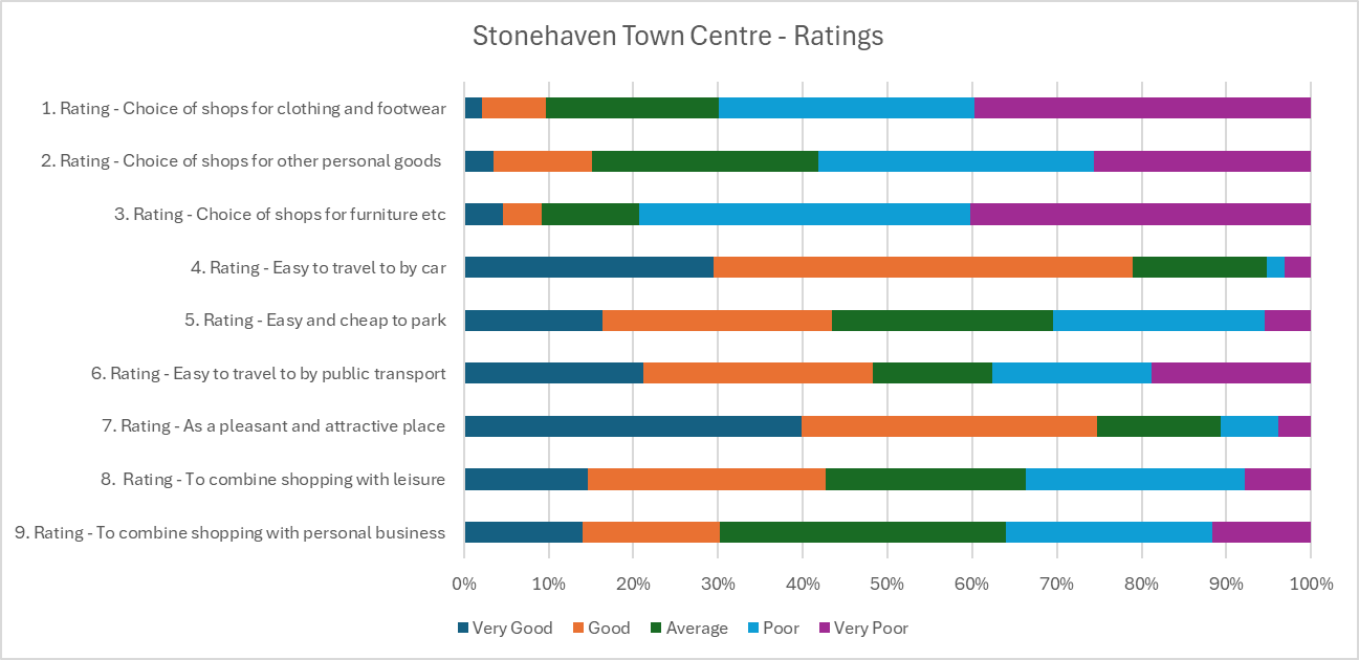
Turnover and Sales Densities

4.163. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre (excluding retail parks) as follows:

- Convenience Goods: 13 units; 1624 sq m GFA; 1055 sq m NFA (sales); and £9.07 m turnover.
- General Comparison and Bulky Goods: 41 units; 4218 sq m GFA; 2742 sq m NFA (sales); and £9.95m turnover.
- Services: 66 units; 5369 sq m GFA
- Vacancies: 4 units; 232 sq m GFA

Figure 4.48 Household Survey: Attitudes to Stonehaven Town Centre

Stonehaven TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	2%	3%	5%	29%	16%	21%	40%	15%	14%
Good	8%	12%	5%	49%	27%	27%	35%	28%	16%
Average	20%	27%	11%	16%	26%	14%	15%	24%	34%
Poor	30%	33%	39%	2%	25%	19%	7%	26%	24%
Very Poor	40%	26%	40%	3%	5%	19%	4%	8%	12%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-60%	-43%	-70%	74%	13%	11%	64%	9%	-6%
Balance Rank (of 14)	10	11	13	9	12	8	3	7	6



4.164. In the town centre services account for a significant larger number of units and floorspace than do retail goods shops.

4.165. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 85% of national averages.
- General comparison goods densities are slightly below to national averages (80%).
- Bulky goods appear to be trading slightly above average levels (119%).

4.166. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Stonehaven to trade at levels slightly below national averages. In this context the sales densities identified are consistent with the low level of vacancies identified in the town centre.

Catchment Area and Market Penetration

4.167. Figure 4.49 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Stonehaven Town Centre and also the levels of market penetration for different goods categories. The figure also summarises other key information for the town centre in 2023 including the location of principal retail frontages. The figure identifies that:

- For Convenience Goods: the centre's PCA comprises Zone 21 (Stonehaven) with the SCA extending to Zone 22 (Mearns). Market penetration rates in the PCA are 10-30% and less than 10% in the SCA.
- For general comparison goods the PCA and SCA are both limited to Zone 21. Market penetration rates are 10-30% in this area.
- For bulky goods the SCA extends to cover a wider area including parts of Zones 20E and 20W. However, market penetration rates in this are low (<10%).

Future Changes in Retail Turnover: Stonehaven Town Centre

4.168. Figure 4.50 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

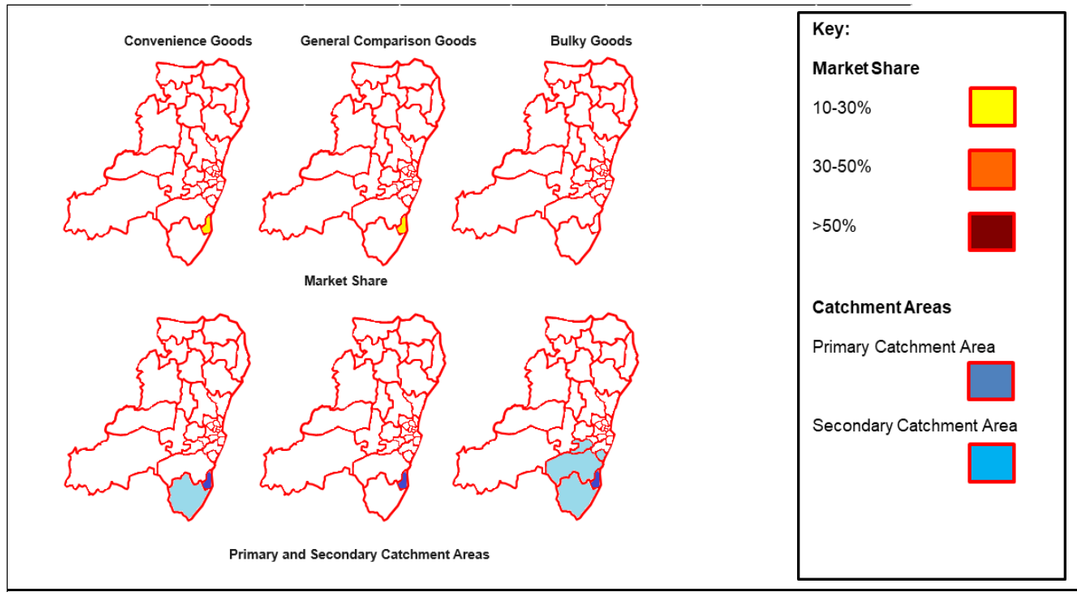
4.169. The principal forecasts are:

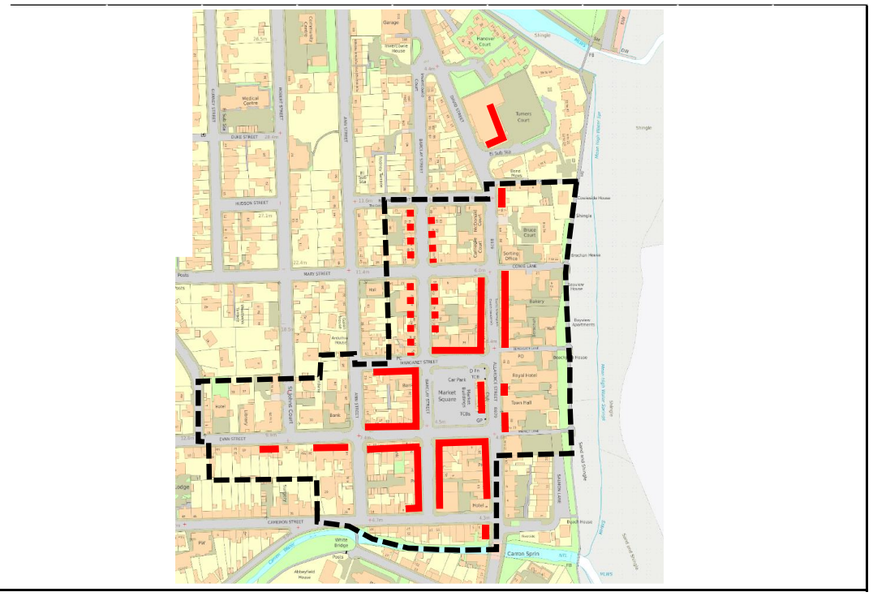
- Slow decline in turnover for convenience goods to 2038.
- Slow growth for general comparison and bulky goods turnover to 2028 and slightly faster accelerating from 2028 to 2038.

4.170. In overall terms turnover for the town centre is identified to benefit from steady growth through to 2038.

4.171. Sales densities for convenience and comparison goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 4.49: Stonehaven Town Centre - Key Retail Characteristics





Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	54	1624	1055		9.07	3580	2327		9.35	638	414		1.60	5841	3797		20.03
Retail Services	66													5369			
Vacant	4													232			
ALL RETAIL GOODS AND SERVICES	**124**	**1624**	**1055**		**9.07**	**3580**	**2327**		**9.35**	**638**	**414**		**1.60**	**11442**			**20.03**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	14	39	37	10	100	£14.66m
2013	15	35	47	4	101	£15.21m
2018					0	
2023	13	41	66	4	124	£20.03m
					change 2013-23	+32%
					change 2004-23	+37%

Vitality and Viability Summary

2023 Household Survey. Stongly positive views expressed about access by private car, parking and as an attractive place. Neutral views expressed about leisure activities, personal business and access by public transport. Significantly negative views expressed regarding all categories of comparison goods shopping .

Strengths
Easily accessible; strong independent sector and environmental quality. Good range of retail and additional services. Very low vacancies which have, generally, been maintained for a considerable period of time.

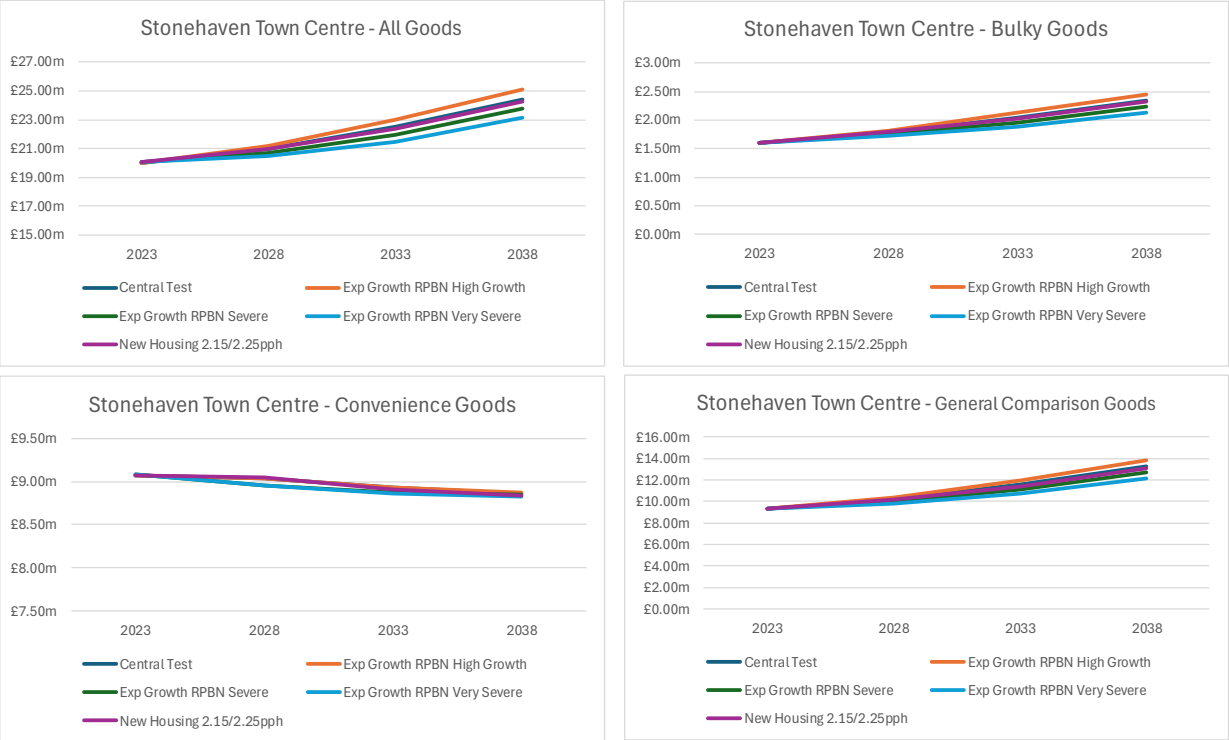
Weaknesses
Limited retail offer and lack of national multiples. Negative household views about the retail offer within the town centre.

Others
The town centre has consistently had very low vacancies and turnover has incleased reflecting growth in the catchment area.

Retail Strategy Summary

Centre Classification	Principal Town Centre
Planning Policy Approach	Protection Review town centre boundaries to reflect linkage with Co-op supermarket
Proposed Retail Floorspace	
Commitments	Supermarket consented at Uryside will impact on convenience provision in the town centre and adjacent Co-op
Proposals	Tesco proposals for a further/alternative supermarket north of A90

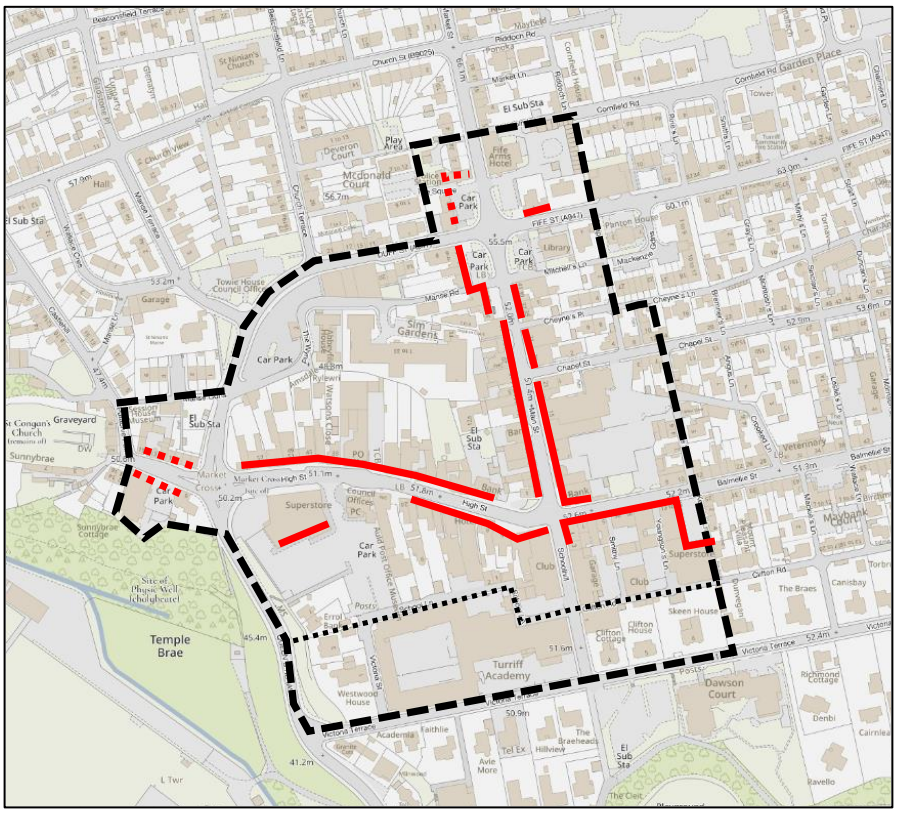
Figure 4.50 Forecast Future Turnover of Stonehaven Town Centre



Turriff Town Centre

4.172. Figure 4.51 identifies the extent of Turriff town centre as defined in the LDP.

Figure 4.51. Turriff Town Centre



Space in Use

Numbers of Units by Type

4.173. Figure 4.52 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 4.52: Turriff Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	9	14		11
Comparison	17	32		28
Retail, Leisure + Business Services	16	30		33
Vacant	2	2		3
TOTAL	44	78		75
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	2169	4468		2650
Comparison	2195	7431		6447
Retail, Leisure + Business Services	1912	2592		3867
Vacant	180	172		211
TOTAL	6456	14663		13174

Changes Over Time

4.174. Examination of Figure 4.52 indicates some changes in the overall provision since 2013. The number of convenience and comparison goods shops has reduced, both in terms of numbers of units and floorspace. There has, however been a significant increase in numbers and floorspace in retail/leisure/business services, primarily in terms of floorspace. Vacancies have remained at a low level throughout the period from 2004.

Vacancies

Vacancy Rates

4.175. Figure 4.52 also sets out information on vacancies within Turriff town centre. In 2023/24 the vacancy rates were:

- Number of units: 4%
- Floor area: 2%

4.176. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Turriff town centre's vacancy rate is very low compared to the UK average by both number of units and floorspace. The vacancy rate is nearly as low as that identified for Stonehaven and Inverurie.

Changes over Time

4.177. Figure 4.52 indicates that vacancies since 2004 have remained at a very low level.

Additional Facilities/Services

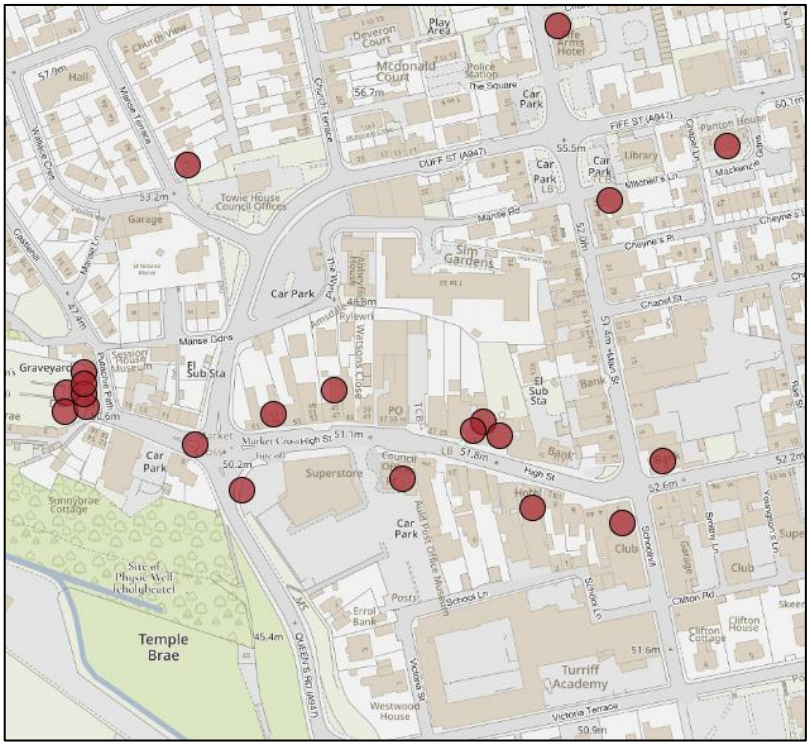
4.178. Turriff provides a range of additional facilities and services in addition to retail/retail services. These include:

- Turriff Academy
- Museum
- GPO Delivery/Sorting/Collection office
- Dentist
- Clinics (5)
- Royall British Legion/club
- Vet
- Council Service Point
- Library
- Police
- Funeral director

Heritage

4.179. There are approximately 20 Listed Buildings within/adjacent to the town centre. No part of the town centre is included within or adjacent to a Conservation Area.

Figure 4.53. Turriff Town Centre – Heritage Designations (Listed Buildings, Conservation Areas and Scheduled Monuments)



Household Survey Perceptions of the Town Centre

4.180. Figure 4.52 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for clothing and foot wear is identified to be "poor" (positive rating of -23%) but for other personal goods and for bulky goods this is rated as between "average" and good" (rating +20% and +19%).
- Access to the town centre by car is viewed as "very good" and parking and access by public transport is between "average" and "good".
- The town centre is identified as "very good" as a pleasant and attractive place to visit.
- Ratings for combining shopping with leisure is identified as generally "very good" but for personal business it is rated as "very poor".

4.181. In overall terms the town centre was viewed as generally "good" across all indicators for all the centres included within the survey and the centre was ranked 2nd centre out of the 14 included in the survey.

Frequency of Visit

4.182. The household survey identified that, for those living within postcode sectors close to Turriff, the average number of visits was close to three times per week. Two thirds of respondents identified that they visited the centre at least once per week but a further 17% indicated that they never visited Turriff. These figures indicate that the centre is primarily used for frequent "top-up" type visits for shopping and for accessing other services and facilities.

Conclusions

4.183. Based on the surveys undertaken it is evident that the vitality and viability indicators present a positive picture of the vitality and viability of the centre.

- Vacancies are very low and have remained below the national average for a significant period of time.
- The retail offer within the town centre is generally limited – most of the Goad categories of retail unit are found in the town centre but choices are generally very limited. There are few multiples in the town centre and none for clothing goods.
- The centre provides a reasonable range of additional (non-retail) services and facilities.
- Retail goods floorspace has gradually reduced since 2013.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is high – no part of the centre is within a conservation area and there are relatively few listed buildings but the overall quality of the urban environment is quite high. The household survey identified strongly positive views about the attractiveness of the town centre.
- The centres is seen as easy to access by private transport and has reasonable access by public transport.
- Household interview responses provide a generally positive view of the town centre with residents visiting on a very frequent basis.

Turriff Town Centre: Turnover, Catchment Area and Future Growth

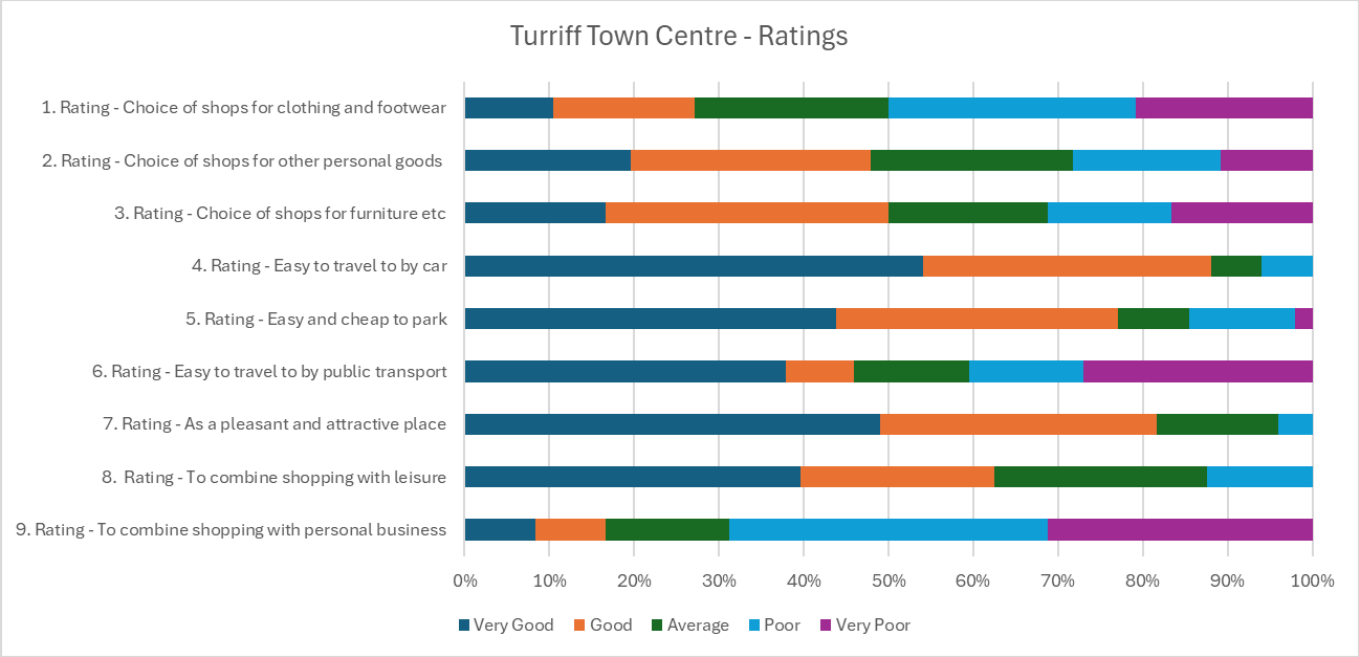
Turnover and Sales Densities

4.184. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 11 units; 2650 sq m GFA; 1688 sq m NFA (sales); and £14.61 m turnover.
- General Comparison and Bulky Goods: 28 units; 6447 sq m GFA; 4188 sq m NFA (sales); and £10.57m turnover.
- Services: 33 units; 3867 sq m GFA
- Vacancies: 3 units; 211 sq m GFA

Figure 4.54 Household Survey: Attitudes to Turriff Town Centre

Turriff TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	10%	20%	17%	54%	44%	38%	49%	40%	8%
Good	17%	28%	33%	34%	33%	8%	33%	23%	8%
Average	23%	24%	19%	6%	8%	14%	14%	25%	15%
Poor	29%	17%	15%	6%	13%	14%	4%	13%	38%
Very Poor	21%	11%	17%	0%	2%	27%	0%	0%	31%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-23%	20%	19%	82%	63%	5%	78%	50%	-52%
Balance Rank (of 14)	5	2	3	6	3	11	1	2	10



4.185. These figures indicate a broad balance of uses and space within the town centre with no individual sector dominating.

4.186. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 76% of national averages.
- General comparison goods densities are significantly below national averages (48%).
- Bulky goods appear to be trading slightly above average levels (131%).

4.187. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Turriff to trade at levels below national averages. However, sales densities for general comparison goods identified from the survey are not consistent with the low vacancy rate that has persisted for the past 20 years.

Catchment Area and Market Penetration

4.188. Figure 4.55 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Turriff Town Centre and also the levels of market penetration for different goods categories. The figure also summarises other key information for the town centre in 2023 including the location of principal retail frontages. The figure identifies that:

- For Convenience Goods: the centre's PCA comprises Zone 6 (Turriff) with the SCA extending east to include the rural areas in Zones 8 and 9. Market penetration rates in the PCA are high at >50% and 10%-30% in the SCA.
- For general comparison goods and bulky goods the PCA and SCA are the same as identified for convenience goods. The centre has high market penetration for the PCA for general comparison (>50%) and reasonable market penetration/share in the SCA (10-50%). Market penetration rates for bulky goods are lower in both the PCA and SCA.

Future Changes in Retail Turnover: Turriff Town Centre

4.189. Figure 4.56 sets out the future turnover of each of the principal goods categories for the town centre for the period 2023 to 2038 for each strategic model test.

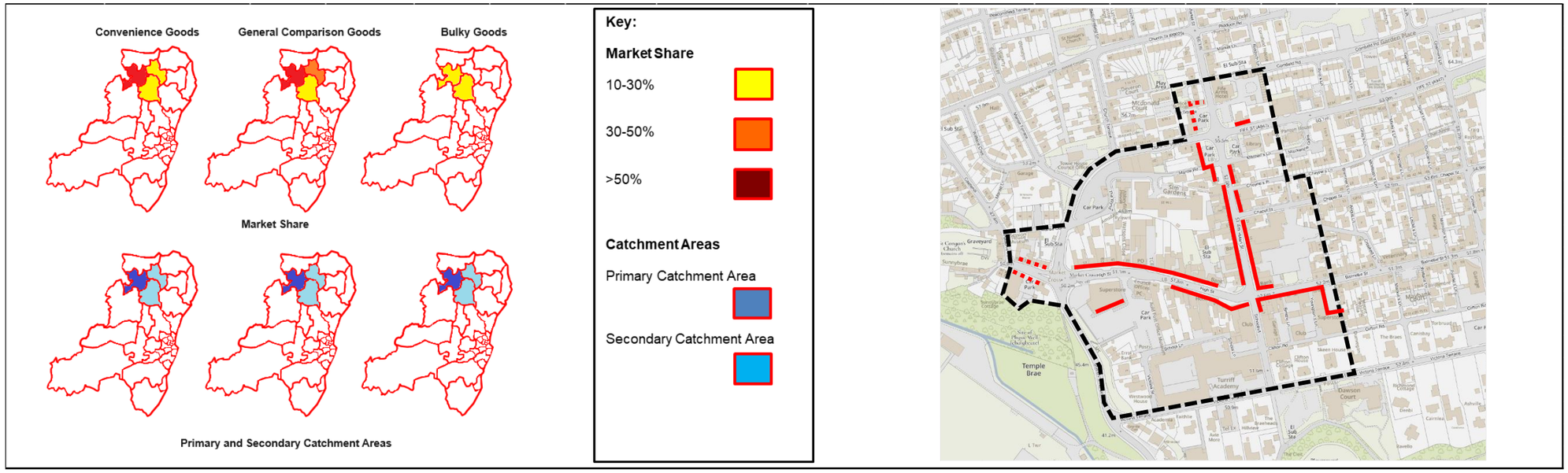
4.190. The principal forecasts are:

- Decline in turnover for convenience goods to 2028 and slow growth thereafter to 2038.
- Slow growth for general comparison and bulky goods turnover to 2028 and slightly faster accelerating from 2028 to 2038.

4.191. In overall terms turnover for the town centre is identified to have a slight decline to 2028 with significant growth from 2028 to 2038.

4.192. Sales densities for convenience and comparison goods will change reflecting the forecast changes in turnover for all goods categories.

Figure 4.55: Turriff Town Centre - Key Retail Characteristics



Floorspace and Turnover 2023																
		Convenience				General Comparison				Bulky Goods				All Goods			
	No.	GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover	
		Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m
Total Retail Goods Floorspace	39	2650	1688		14.61	6075	3947		9.54	372	242		1.03	9097	5876		25.19
Retail Services	33													3867			
Vacant	3													211			
ALL RETAIL GOODS AND SERVICES	**75**	**2650**	**1688**		**14.61**	**6075**	**3947**		**9.54**	**372**	**242**		**1.03**	**13174**			**25.19**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	9	17	16	2	44	£14.07m
2013	14	32	30	2	78	£24.58m
2018					0	
2023	11	28	33	3	75	£25.19m
					change 2013-23	+2%
					change 2004-23	+79%

Vitality and Viability Summary

2023 Household Survey. Strong positive views regarding accessibility by private car, parking, as an attractive place and for leisure activities. Neutral/slightly positive responses for access by public transport, choice of comparison goods shopping (not clothing and footwear - slightly negative). Only strongly negative views were for personal business.

Strengths
Very low vacancies - well below national averages. Good convenience offer. Attractive pedestrian environment; strong indepoendent sector; high levels of household satisfaction.

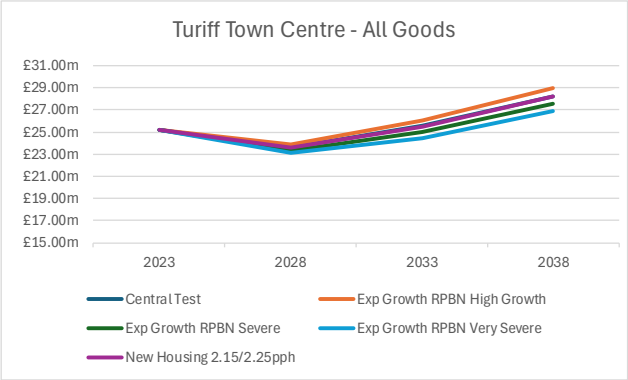
Weaknesses
Limited non-food offer; lack of multiples.

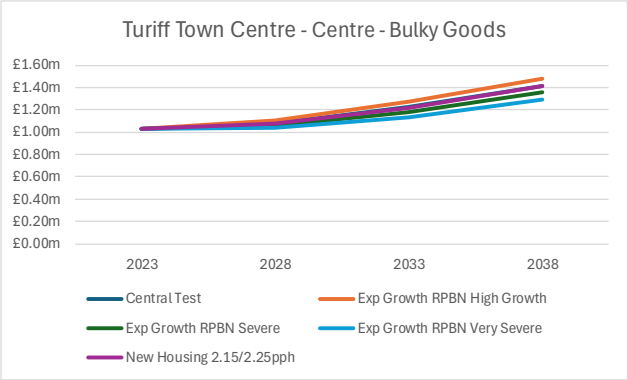
Others
Turriff has sustained high levels of occupancy retaining a strong independent retail and service offer.

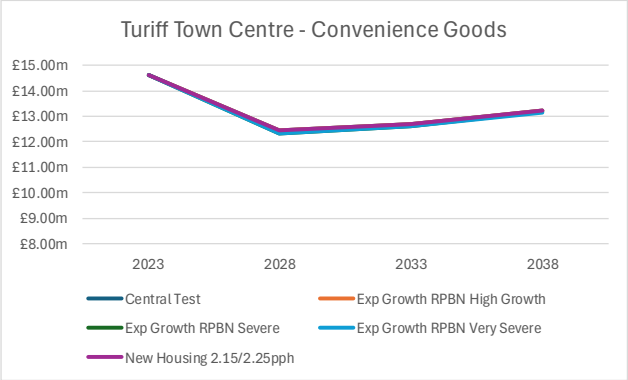
Retail Strategy Summary

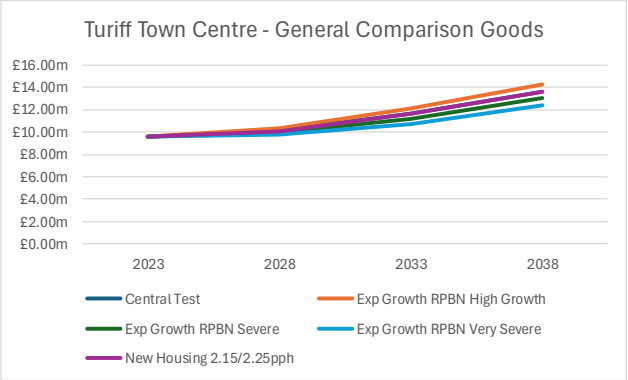
Centre Classification	Principal Town Centre
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	Additional floorspace to serve OP1 and OP2 should not threaten town centre.

Figure 4.56 Forecast Future Turnover of Turriff Town Centre







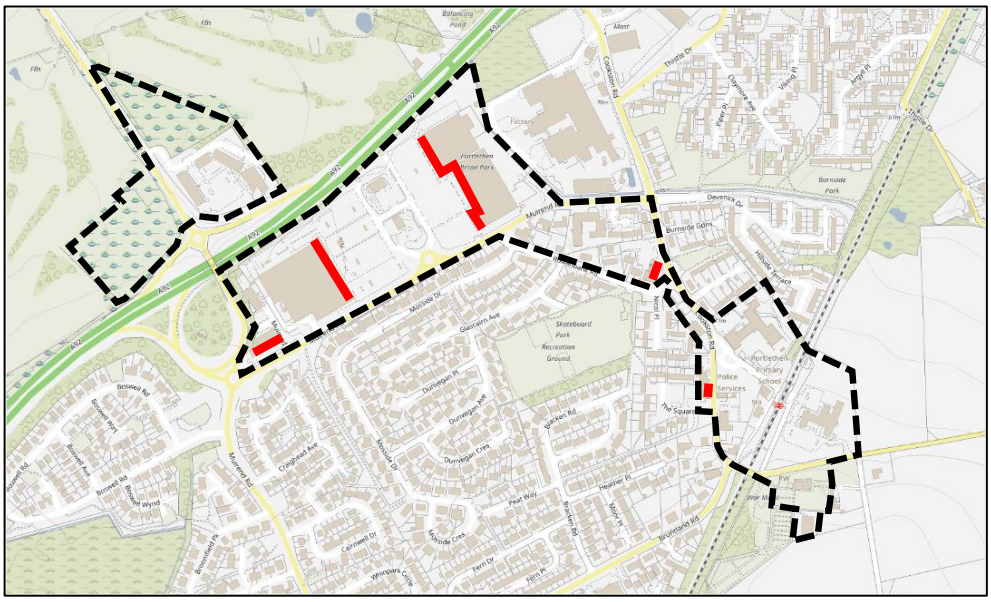


Portlethen Town Centre

4.193. Portlethen and Westhill are both identified as "Other Town centres" in the Aberdeenshire LDP (2023). However, these two centres are significantly larger, in terms of floorspace and turnover, than other locations with the same designation. This was shown in the analysis of centres set out in Vol 1 Figure 4.7. Furthermore, the floorspace and turnover of Portlethen is dominated by the retail park which renders this an unusual "town" centre compared to others in Aberdeenshire. Reflecting these characteristics this section includes a review of both Westhill and Portlethen similar to that provided for the Principal Town Centres

4.194. Figure 4.57 identifies the extent of Portlethen town centre as defined in the LDP.

Figure 4.57. Portlethen Town Centre



Space in Use

Numbers of Units by Type

4.195. Figure 4.58 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 4.58: Portlethen Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	3	3		3
Comparison	10	7		5
Retail, Leisure + Business Services	11	13		8
Vacant	0	1		0
TOTAL	24	24	0	16
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	7195	6177	6177	9451
Comparison	18620	15386	11791	12655
Retail, Leisure + Business Services	856	1323	1323	1390
Vacant	0	70	5450	
TOTAL	26671	22956	24741	23496

Changes Over Time

4.196. Examination of Figure 4.58 indicates only limited changes in the overall provision since 2004. The overall number of units has reduced reflecting, primarily, reconfiguration and amalgamation of units. Convenience floorspace has increased as a result of Aldi opening but comparison floorspace remaining broadly the same since 2018 but less than identified in 2004 and 2013. There are no units vacant whereas in 2018 there were vacant units in the retail park.

Vacancies

Vacancy Rates

4.197. Figure 4.58 also sets out information on vacancies within Portlethen town centre. In 2023/24 there were no vacant units.

Changes over Time

4.198. In general since 2004 there have been very few vacancies in Portlethen although, at the time of the 2018 survey, there were vacant units in the retail park that resulted in a high vacancy rate. The current position is more typical of Portlethen over the past 20 years.

Additional Facilities/Services

4.199. Portlethen only provides a limited range of additional services and facilities.

Heritage

4.200. There is only one listed building in the town centre - Portlethen Parish Kirk. The town centre is not located within or close to a Conservation Area.

Household Survey Perceptions of the Town Centre

4.201. Figure 4.59 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for general comparison goods is broadly identified as close to “average” (positive rating of -10% to +12%) but for bulky goods it is identified to be generally “very poor” (rating -70%)
- Access to the town centre by car is viewed as “very good” as is parking and access by public transport is “average”.
- The town centre is identified as “good” as a pleasant and attractive place to visit.
- Ratings for combining shopping with leisure is identified as generally “poor” and for personal business it is rated as “very poor”.

4.202. In overall terms the town centre was viewed as generally “average” across all indicators for all the centres included within the survey and the centre was ranked 7th centre out of the 14 included in the survey.

Frequency of Visit

4.203. The household survey identified that, for those living within postcode sectors close to Portlethen, the average number of visits was close to once per week. Over 40% (44%) of respondents identified that they visited the centre at least once per week but a further 16% indicated that they never visited Portlethen. These figures indicate that the centre is primarily used for regular visits either for top-up purposes or for routine (weekly) shopping trips.

Conclusions

4.204. Based on the surveys undertaken it is evident that the vitality and viability indicators present a mixed picture of the vitality and viability of the centre.

- Vacancies are very low and have normally remained below the national average for a significant period of time.
- The retail offer within the town centre is generally limited in terms of numbers of units but the shops are large national multiples often retailing a very wide range of goods (both convenience and comparison)
- The centre provides a very limited range of additional (non-retail) services and facilities.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is dominated by cars and car parking. However, the household survey identified a generally positive view of the attractiveness of the centre.
- The centres is seen as very easy to access by private transport and has reasonable access by public transport.
- Household interview responses provide a generally neutral view of the town centre with residents visiting on a regular basis.

Portlethen Town Centre: Turnover, Catchment Area and Future Growth

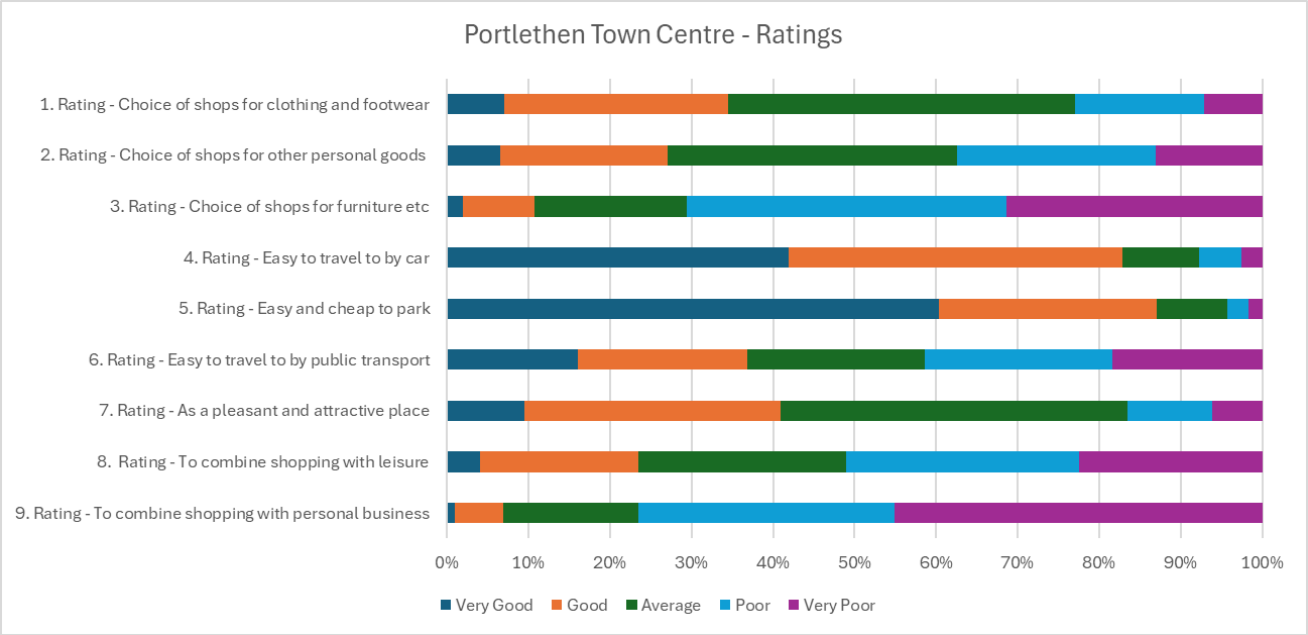
Turnover and Sales Densities

4.205. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre (including the retail park) as follows:

- Convenience Goods: 3 units; 9451 sq m GFA; 5676 sq m NFA (sales); and £47.82 m turnover.
- General Comparison and Bulky Goods: 5 units; 12655 sq m GFA; 8198 sq m NFA (sales); and £34.66 turnover.
- Services: 8 units; 1390 sq m GFA
- Vacancies: *none*

Figure 4.59 Household Survey: Attitudes to Portlethen Town Centre

Portlethen TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	7%	7%	2%	42%	60%	16%	10%	4%	1%
Good	27%	21%	9%	41%	27%	21%	31%	19%	6%
Average	42%	36%	19%	9%	9%	22%	43%	26%	17%
Poor	16%	24%	39%	5%	3%	23%	10%	29%	31%
Very Poor	7%	13%	31%	3%	2%	18%	6%	22%	45%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	12%	-10%	-60%	75%	83%	-5%	24%	-28%	-70%
Balance Rank (of 14)	2	5	11	8	2	13	8	12	12



4.206. These figures indicate the dominance of large format retail units including a large superstore and a series of large floorplate retail warehouse units.

4.207. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 75% of national averages.
- General comparison goods densities are below national averages (72%).
- Bulky goods appear to be trading slightly below average levels (93%).

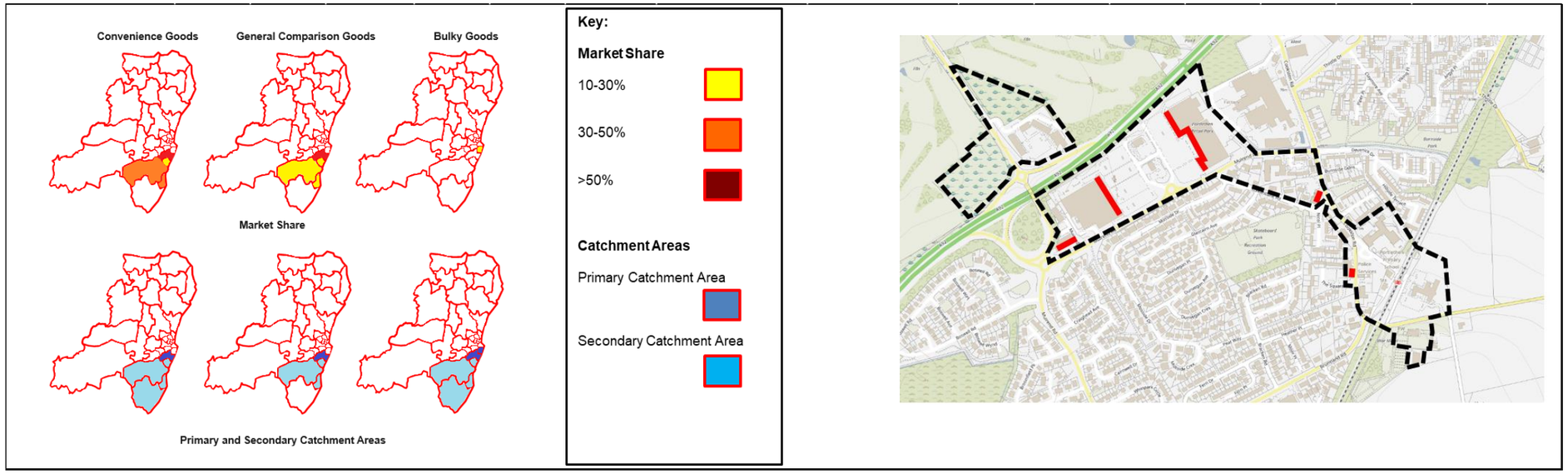
4.208. In the case of Portlethen, because it is dominated by national multiple retailers for which average sales densities are available from Retail Rankings these densities imply a generally below average level of sales from the results of the household survey. It is considered that these figures may seem a little low given that all units are let on the retail park.

Catchment Area and Market Penetration

4.209. Figure 4.60 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Portlethen Centre and also the levels of market penetration for different goods categories. The figure also summarises other key information for the town centre in 2023 including the location of principal retail frontages. The figure identifies that:

- For Convenience Goods: the centre's PCA comprises Zone 31 (Portlethen) with the SCA extending west to include 20 (E&W), 21 and 22. Market penetration rates in the PCA are high at >50% and 10%-50% in the SCA.
- For general comparison goods and bulky goods the PCA and SCA are similar to those identified for convenience goods. The centre has high market penetration for the PCA for general comparison (>50%) and reasonable market penetration/share in the SCA (10-30%). Market penetration rates for bulky goods are significantly lower in both the PCA and SCA.

Figure 4.60: Portlethen Town Centre - Key Retail Characteristics



Floorspace and Turnover 2023

	No.	Convenience GFA Sq M	Convenience NFA Sq M	Convenience Turnover £/Sq M	Convenience Turnover £m	General Comparison GFA Sq M	General Comparison NFA Sq M	General Comparison Turnover £/Sq M	General Comparison Turnover £m	Bulky Goods GFA Sq M	Bulky Goods NFA Sq M	Bulky Goods Turnover £/Sq M	Bulky Goods Turnover £m	All Goods GFA Sq M	All Goods NFA Sq M	All Goods Turnover £/Sq M	All Goods Turnover £m
Total Retail Goods Floorspace	8	9451	5676		47.82	10505	6830		29.19	2150	1313		5.41	22107	13819		82.42
Retail Services	8													1390			
Vacant																	
ALL RETAIL GOODS AND SERVICES	**16**	**9451**	**5676**		**47.82**	**10505**	**6830**		**29.19**	**2150**	**1313**		**5.41**	**23497**			**82.42**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	3	10	11	0	24	£67.01m
2013	3	7	13	1	24	£71.52m
2018					0	
2023	3	5	8	0	16	£82.42m
					change 2013-23	+8242%
					change 2004-23	+23%

Vitality and Viability Summary

2023 Household Survey. Strongly positive views regarding access by car and for parking and slightly positive views as an attractive place. Neutral views regarding clothes shopping, other personal goods and public transport. Negative views regarding bulky goods shopping, leisure activities and for personal business.

Strengths
Large format units operated by national multiples providing wide range of goods. Easily accessible by car. Serves expanding market from Chapelton. No vacancies; high turnover.

Weaknesses
Dominance by retail park format plus limited range of local neighbourhood shopping parades. Lack of cohesion as a town centre, envirronmental quality dominated by private car.

Others
The retail park in Portlethen dominates the turnover and floorspace of the centre but this has the characteristic of a Commercial Centre and not a traditional town centre format. However, the town centre clearly serves the local community and nearby areas including Chapelton. Viability indicators are very strong in terms of turnover and lack of vacancies.

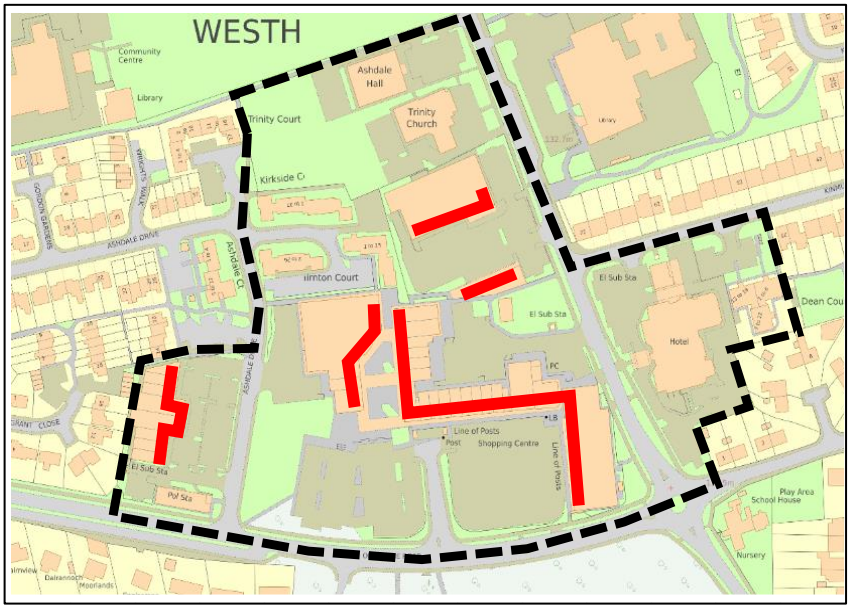
Retail Strategy Summary

Centre Classification	Other Town Centre/Commercial Centre
Planning Policy Approach	Retain as Other Town Centre reflecting role in serving community. Protection.
Proposed Retail Floorspace	
Commitments	
Proposals	

Westhill Town Centre

4.210. Figure 4.61 identifies the extent of Westhill town centre as defined in the LDP.

Figure 4.61. Westhill Town Centre



Space in Use

Numbers of Units by Type

4.211. Figure 4.62 sets out information on the numbers of units and space by type of retail and leisure/service use in accordance with the categories identified in Goad town centre reports. This covers the period 2004 to 2023.

Figure 4.62: Westhill Town Centre– Types of Use 2004-2023

TYPES OF RETAIL/SERVICE UNITS	COUNT			
	2004	2013	2018	2023
Convenience	4	4		5
Comparison	8	9		9
Retail, Leisure + Business Services	9	16		16
Vacant		1		6
TOTAL	21	30		36
TYPES OF RETAIL/SERVICE UNITS	FLOOR AREA (SQ M)			
	2004	2013	2018	2023
Convenience	2027	3300		3407
Comparison	874	1145		1880
Retail, Leisure + Business Services	1050	1633		1803
Vacant				780
TOTAL	3951	6078		7870

Changes Over Time

4.212. Examination of Figure 4.62 indicates some significant changes in the overall provision since 2013 and 2008. The number of convenience and comparison goods shops has increased, particularly for comparison floorspace. There have been more limited changes in terms of services units with

most growth occurring between 2004 and 2013. There has also been a significant increase in vacant units between 2013 and 2023.

Vacancies

Vacancy Rates

4.213. Figure 4.62 also sets out information on vacancies within Westhill town centre. In 2023/24 the vacancy rates were:

- Number of units: 17%
- Floor area: 10%

4.214. Goad reported that, in September 2022 the UK national vacancy rate was 14.1% by number of units and 13.9% by floor area. This would suggest that Westhill's current vacancy rate is above average by number of units and slightly below average by floorspace.

Changes over Time

4.215. Figure 4.62 indicates that vacancies in 2004 and 2013 were very low – the current position is, therefore, significantly different.

Heritage

4.216. There are no listed buildings nor conservation areas within/adjacent to the town centre.

Household Survey Perceptions of the Town Centre

4.217. Figure 4.63 sets out attitudes to characteristics of the town centre from the household survey. In summary the principal findings are that:

- Shopping provision for both general comparison goods and bulky goods is rated as "poor" to "very poor" (ratings of -43% to -70%).
- Access to the town centre by car is viewed as "very good" and parking and access by public transport is between "average" and "good".
- The town centre is identified as "very good" as a pleasant and attractive place to visit.
- Ratings for combining shopping with leisure and with personal business are both rates as close to "average".

4.218. In overall terms the town centre was viewed as generally "average" across all indicators for all the centres included within the survey and the centre was ranked 8th centre out of the 14 included in the survey.

Frequency of Visit

4.219. The household survey identified that, for those living within postcode sectors close to Westhill, the average number of visits was between 2 and 3 times per week. Almost three quarters (74%) of respondents identified that they visited the centre at least once per week and only 7% indicated that they never visited Westhill. These figures indicate that the centre is primarily used for frequent "top-up" type visits for shopping and for accessing other services and facilities.

Conclusions

4.220. Based on the surveys undertaken it is evident that the vitality and viability indicators present a generally positive picture of the vitality and viability of the centre.

- Vacancies are generally close to the national average but this is significantly higher than previously recorded.

- The retail offer within the town centre is limited – this reflects the limited size of the centre and number of shops present.
- The centre provides a limited range of additional (non-retail) services and facilities.
- Retail goods floorspace has gradually reduced since 2013.
- Limited market information makes it difficult to draw conclusions regarding commercial indicators of rents and yields.
- The environmental quality of the town centre is good reflecting that, apart from the parking areas, pedestrians are segregated from cars providing a relatively safe environment. The household survey identified strongly positive views about the attractiveness of the town centre.
- The centres is seen as easy to access by private transport and has reasonable access by public transport.
- Household interview responses provide a generally neutral view of the town centre with residents visiting on a very frequent basis. The principal weakness is the small size of the centre limiting the retail offer available.

Westhill Town Centre: Turnover, Catchment Area and Future Growth

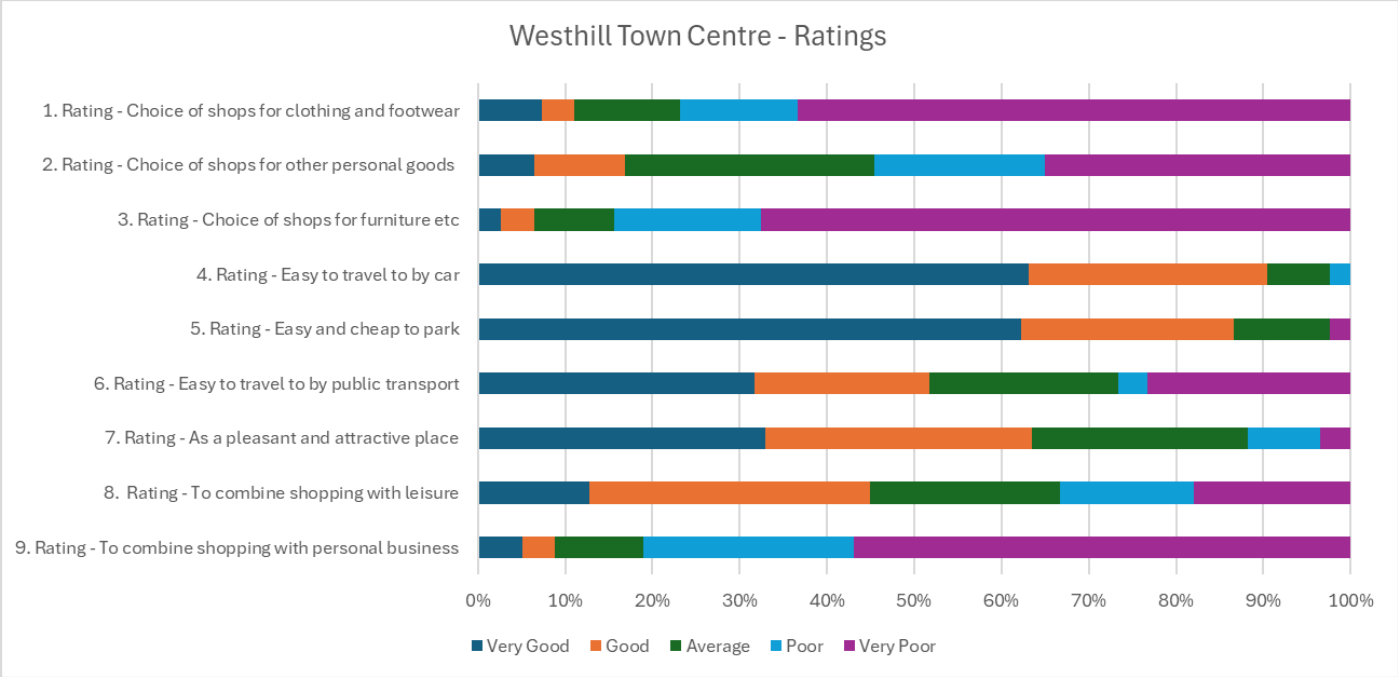
Turnover and Sales Densities

4.221. The Strategic Retail Model (central case scenario) identifies the number of units, gross and net floorspace and turnover for each of convenience goods, general comparison and bulky goods retail for the town centre as follows:

- Convenience Goods: 5 units; 3407 sq m GFA; 2130 sq m NFA (sales); and £23.18 m turnover. Convenience provision is dominated by the M&S and Aldi foodstores.
- General Comparison and Bulky Goods: 9 units; 1880 sq m GFA; 1405 sq m NFA (sales); and £6.25 turnover.
- Services: 16 units; 1803 sq m GFA
- Vacancies: 6 units; 780 sq m GFA

Figure 4.63. Household Survey: Attitudes to Westhill Town Centre

Westhill TC	1. Rating - Choice of shops for clothing and footwear	2. Rating - Choice of shops for other personal goods	3. Rating - Choice of shops for furniture etc	4. Rating - Easy to travel to by car	5. Rating - Easy and cheap to park	6. Rating - Easy to travel to by public transport	7. Rating - As a pleasant and attractive place	8. Rating - To combine shopping with leisure	9. Rating - To combine shopping with personal business
Very Good	7%	6%	3%	63%	62%	32%	33%	13%	5%
Good	4%	10%	4%	27%	24%	20%	31%	32%	4%
Average	12%	29%	9%	7%	11%	22%	25%	22%	10%
Poor	13%	19%	17%	2%	0%	3%	8%	15%	24%
Very Poor	63%	35%	68%	0%	2%	23%	4%	18%	57%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance	-66%	-38%	-78%	88%	84%	25%	52%	12%	-72%
Balance Rank (of 14)	5	9	14	3	1	5	6	6	13



4.222. These figures indicate a broad balance of uses and space within the town centre although turnover from the two supermarkets tends to dominate activity within the centre.

4.223. The SRM also allows comparison between sales densities and national average densities:

- Convenience goods these are identified to be, in 2023, trading at 93% of national averages.
- General comparison goods densities are significantly below national averages (69%).
- Bulky goods appear to be trading close to average levels (97%).

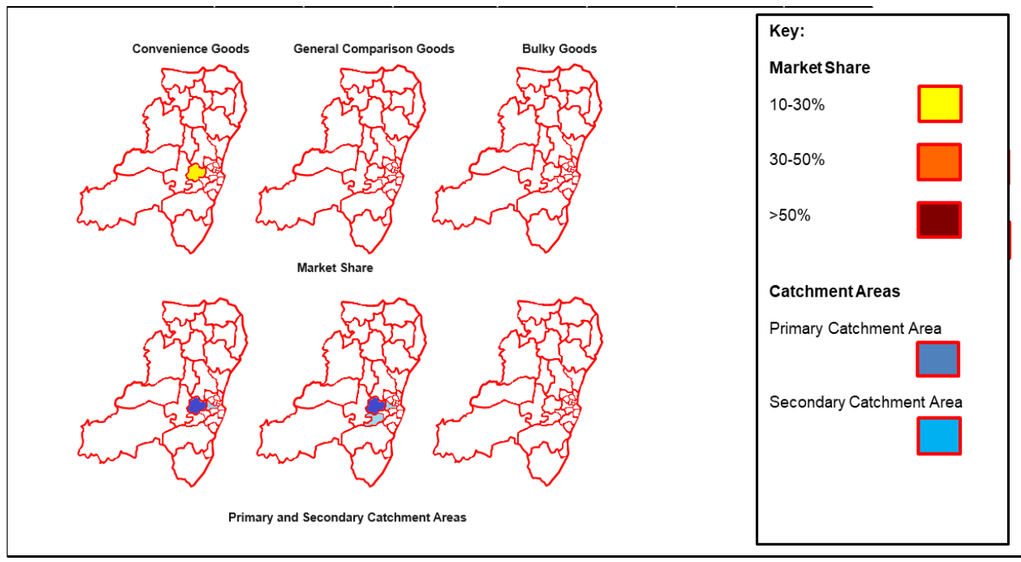
4.224. Caution is needed in interpreting these figures and it would not be unreasonable to expect retail units, especially general comparison units, in a town centre such as Westhill to trade at levels below national averages. However, sales densities for general comparison goods identified from the survey are broadly consistent with the vacancy rate found at the centre.

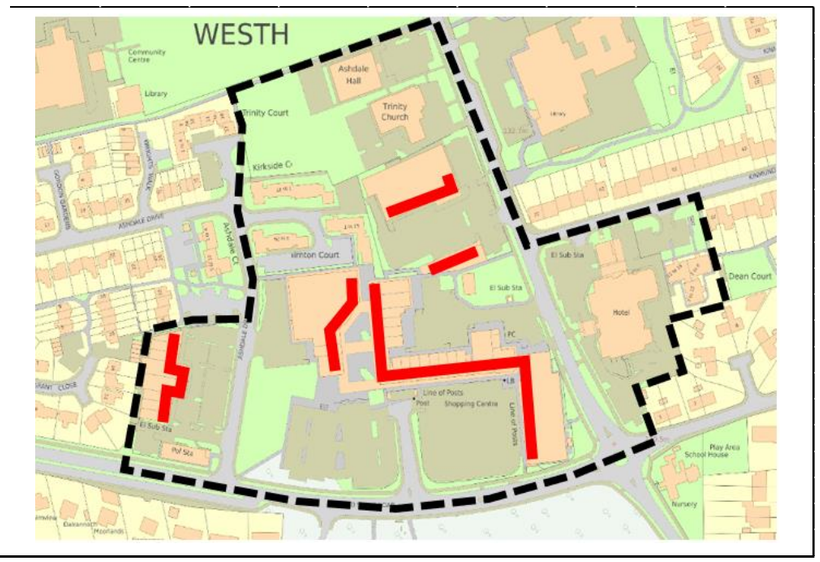
Catchment Area and Market Penetration

4.225. Figure 4.64 uses information from the SRM to identify the primary and secondary catchment areas (PCA and SCA) for Westhill Town Centre and also the levels of market penetration for different goods categories. The figure also summarises other key information for the town centre in 2023 including the location of principal retail frontages within the town centre. The figure identifies that:

- For Convenience Goods: the centre's PCA and SCA comprises Zone 18 (Westhill) with the SCA extending east to include Zone 29N (Kingswells area). Market penetration rates in the PCA are modest at 10-30% in the PCA and lower in the SCA. A key factor limiting market penetration is the Tesco superstore located in south Westhill.
- For general comparison goods the PCA and SCA is similar to that identified for convenience goods but the SCA includes Zone 19 (shire - Banchory). Market penetration rates are, however, low at less than 10%. Bulky goods turnover is very small and it is not appropriate to identify catchment areas.

Figure 4.64: Westhill Town Centre - Key Retail Characteristics





Floorspace and Turnover 2023																
		Convenience				General Comparison				Bulky Goods				All Goods			
	No.	GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover		GFA	NFA	Turnover	
		Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m	Sq M	Sq M	£/Sq M	£m
Total Retail Goods Floorspace	14	3407	2130		23.18	1800	1353		6.14	80	52		0.11	5287	3535		29.44
Retail Services	16													1803			
Vacant	6													780			
ALL RETAIL GOODS AND SERVICES	**36**	**3407**	**2130**		**23.18**	**1800**	**1353**		**6.14**	**80**	**52**		**0.11**	**7871**			**29.44**

Recent Changes

Year	No. of Units Conv	Comp	Ret Services	Vacant	Total	Retail Goods Turnover £m 2021 Prices
2004	4	8	9	0	21	
2013	4	9	16	1	30	£15.01m
2018					0	
2023	5	9	16	6	36	£29.44m
					change 2013-23	+2944%
					change 2004-23	

Vitality and Viability Summary

2023 Household Survey. Strongly positive views about the centre as easy to access by car, parking and as an attractive place. Slightly positive views in terms of access by public transport and for leisure activities. Strongly negative views about shopping for comparison goods (all categories) and for personal business.

Strengths
Significant increases in retail turnover with provisoon of new floorspace since 2013. Given limited size significant number of multiples.

Weaknesses
Small size of centre (by number of units) limits range of goods and services provided. This is reflected in negative views from the household survey. High vacancies at present time (historically vacancies have been very low).

Others
Westhill is successful in terms of turnover and historically low vacancy rates. Current increase in vacancies is not known if this is short-term or reflects structural change to the centre. The key issue is that Westhill falls mid-way between the smaller "other town centres and the "principal" town centres in Aberdeenshire. Future growth is constrained by lack of suitable sites for growth and competition from OOC Tesco and Costco.

Retail Strategy Summary

Centre Classification	Other Town Centre No change proposed to network designation
Planning Policy Approach	Protection
Proposed Retail Floorspace	
Commitments	
Proposals	

Commercial Centres & Retail Parks

4.226. The Aberdeenshire LDP 2023 identifies the following locations as commercial centres:

- Buchan Gateway, Peterhead
- Corskie Drive/B9026, Macduff
- Highclere Business Park, Inverurie
- Portlethen Retail Park
- South Harbour Road, Fraserburgh
- Steven Road, Huntly
- Waterton, Ellon
- Windmill Road, Peterhead

4.227. From the LDP Policy B1 identifies Commercial Centres in the context of the application of the sequential approach. The policy does not identify the need to assess the retail (or other) impact of a development proposal on Commercial Centres restricting this consideration only to impacts on town centres. In this context it is not necessary to identify the turnover or viability of retail and other floorspace within the identified Commercial Centres. However, each of these locations can be identified from the relevant parts of Tables 19 – 21 of the Strategic retail Model (provided in Appendix A provided in Volume 3 of the study report).

4.228. If, however, consideration is given to the protection of Commercial Centres on the basis that they provide important services and facilities to the community and are complementary to the network of town centres then it is considered that regard should be had to identifying the following additional locations also as Commercial Centres:

- Deveron Way, Huntly (Tesco supermarket)
- Watermill Road, Fraserburgh
- Hill of Banchory, Banchory
- Arnhall Business Park, Westhill

Deveron Way, Huntly

4.229. In the case of Deveron Way, Huntly it is considered that this store is directly comparable to Steven Road, Huntly (ASDA) and, to be consistent, either both locations should be identified as Commercial Centres, or neither should. It may be that the intention is that land immediately to the west of ASDA could be a site suitable for bulky comparison but this is not clear from the wording of the LDP. There is, however, a comparable (but smaller and landscaped) site adjacent to Tesco at Deveron Way.

Watermill Road, Fraserburgh

4.230. This location includes ASDA and Home Bargains retail units.

Hill of Banchory, Banchory

4.231. In addition to the existing Tesco, planning permission has been granted for a Lidl, Home Bargains and M&S store.

Arnhall Business Park, Westhill

4.232. This location includes Tesco, Costco, the Skene Health Centre and a limited number of trade counter units.