

**ANGUS COUNCIL**

**PLANNING AND TRANSPORT POLICY COMMITTEE**

**11 OCTOBER 2001**

**SUBJECT: ANGUS RETAIL STUDY**

**REPORT BY DIRECTOR OF PLANNING AND TRANSPORT**

**Abstract: This report establishes the requirement for a review of retail trends, provision and prospects within Angus and sets out a proposed project brief for the procurement of a specialist study. The study findings will assist in implementing and reviewing development plan policy and may provide a material consideration in the assessment of development proposals.**

**1 RECOMMENDATION**

It is recommended that the Committee –

1. note the requirement for a review of retail trends, provision and prospects within Angus as an input into development plan policy implementation and review, and as a material consideration in the assessment of development proposals;
2. agree that a consultancy study be commissioned to evaluate current and possible future retail provision and that up to £15,000 be allocated for this purpose.

**2 INTRODUCTION**

- 2.1 The Approved Tayside Structure Plan 1993 and National Planning Policy Guideline (NPPG8) (Revised) Retailing and Town Centres set the strategic context for the retail policies in the Angus Local Plan and the Draft Dundee and Angus Structure Plan.
- 2.2 The Angus Local Plan adopted in November 2000, applies the national and strategic policies at the local level, to protect the vitality and viability of the Angus towns' centres while maintaining consumer choice and competition.
- 2.3 Retailing is the key activity underpinning the town centres and is a dynamic sector which is reflected in continuing changes in store format and investment. This in turn emphasises the need to ensure that retail policies, and the information and assumptions upon which policies are implemented and reviewed, are closely monitored and kept up-to-date.

**3 BACKGROUND**

- 3.1 The Angus towns centres remain the focus for a range of activities including retailing. Physical constraints of the historic town centres, requirements of major foodstore operators and the needs of shoppers have resulted in the development of large modern foodstores on edge of centre sites throughout the Angus towns during the 1980's, 90's and 00's. Ongoing investment in new and expanded premises in the larger towns has been accompanied by a programme of refurbishment and improvement elsewhere maintaining a modern food store sector.

- 3.2 The comparison goods sector (which includes clothes, fashion, electrical goods, furniture etc.) remains important in all the Angus towns and particularly in Arbroath, Forfar and Montrose. Leakage of expenditure to larger centres outwith Angus is also known to be significant. Major investment and refurbishment of Dundee Central area has enhanced the City centre and strengthened its role as the Regional Centre. Aberdeen, Perth, Edinburgh and Glasgow also remain important destinations for shopping trips from Angus particularly for the purchase of larger, specialist and fashion goods.
- 3.3 The most recent major development in Angus in the retail warehouse sector has been the establishment of the Westway Retail Park in Arbroath. There have also been two applications for a retail warehouse at the Montrose Distillery, one of which was approved in 2001. In August the Lothian, Borders and Angus Co-operative Society announced its intention to redevelop their Abbeygate Store in Arbroath to reduce the foodstore floorspace and create two new units and in September Safeway announced plans to expand their Arbroath operation. There have also been changes in operator activity with the Co-op moving into the former Tesco units in Kirriemuir and Carnoustie. Tesco has relocated to a new store in Forfar and their previous premises at Myre Road are currently vacant.
- 3.4 Against this background of investment and change it is important to maintain an informed and up to date knowledge of the current and anticipated future retail situation in order to help implement and where necessary review relevant policies. These policies require to form a robust framework for Development Control decisions and provide appropriate guidance for future investment. It is important that the policy context achieves the aim of promoting the vitality and viability of the town centres and encouraging appropriate investment in the light of the most relevant and current information on existing and possible future retail provision.

#### **4 SCOPE OF STUDY**

- 4.1 The Planning and Transport Department maintains a register of retail and commercial floorspace for all the Angus towns and their central areas as defined by the Angus Local Plan. This provides a baseline for monitoring changes in use, vacancies and provision by outlet (e.g. chemists, furniture etc.). It has recently been expanded to include non-retail premises such as leisure and service facilities.
- 4.2 This database can be used to track changes in floorspace but does not identify the overall health of the centres. The objective of the proposed consultancy study is therefore to assess the current performance and future retail prospects of each of the Angus Towns, including:-
- (a) provide information on consumers' views on and use of selected centres;
  - (b) identify likely trends in food and non-food retailing and implications for the Angus towns' centres.
  - (c) identify shortfalls in and opportunities for retail provision including different types of provisions;

- 4.3 A draft project brief is attached as Appendix 1. It is envisaged that this exercise will help inform the implementation of the Angus Local Plan and its future review. It will strengthen the information base upon which policy is developed and reinforce the policy context for the assessment of planning applications.

## **5 FINANCIAL IMPLICATIONS**

- 5.1 The cost of the Consultant's study is estimated at up to £15,000 which will be met from the Planning and Transport Department's revenue budget for 2001-02.

## **6 HUMAN RIGHTS IMPLICATIONS**

- 6.1 There are no human rights implications arising from this report.

## **7 CONSULTATION**

- 7.1 The Chief Executive, Director of Law & Administration and Director of Finance have been consulted in the preparation of this report.

## **8 CONCLUSION**

- 8.1 The retailing industry remains dynamic which results in pressure for change in both distribution and supply of food and non-food retail floorspace. A specialist study to examine retail trends, provision and prospects across Angus would assist in policy, implementation and development, and would contribute to monitoring and supporting the health of the town centres.

## **NOTE**

No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973, (other than any containing confidential or exempt information) were relied on to any material extent in preparing the above Report.

AA/ID/IAL  
2 October 2001

Alex Anderson  
Director of Planning and Transport

**APPENDIX 1****DRAFT RETAIL STUDY BRIEF****BACKGROUND**

The Angus Local Plan, adopted November 2000, establishes retailing and town centre policies for the seven Angus towns in accordance with NPPG8 (Revised), and the Approved Tayside Structure Plan (1993). There is a need to update the information upon which local retail policies are based and which can help inform:-

- implementation of the adopted Local Plan;
- the future review and roll forward of the Local Plan in conformity with the Dundee & Angus Structure Plan;
- consideration of retail development proposals, including various evidence and impact statements submitted in support of proposals.

**OBJECTIVES**

Maintaining and enhancing the vitality and viability of the existing town centres is the basis of the Council's retail and related policy. In order to ensure that the policies remain relevant and robust the information upon which they are based must also be up to date. The main purpose of the study is, therefore, to assess the current performance and future retail prospects of each of the Angus towns:-

- (a) provide information on consumers' views on and use of selected centres;
- (b) identify likely trends in food and non-food retailing and implications for the Angus towns' centres.
- (c) identify shortfalls in and opportunities for retail provision including different types of provisions;

The study should provide information on the following:-

- (a) retail capacity including sectoral and sub sectoral provision within the Angus towns highlighting any shortfall in quantitative or qualitative retail provision in relation to reasonable expectation of retail offer of comparable locations;
- (b) shopping patterns including areas from which each town draws its trade;
- (c) how people shop, where people shop, mode of transport, combined trips;
- (d) shoppers perception of centres (Angus & Dundee);

- (e) identification of gaps in provision for which there is retailer demand in a format and at a scale which could be accommodated within Angus in relation to physical and demand requirements.

## **METHODOLOGY**

It is essential that the findings of the study are capable of being used with confidence. This will require the successful consultants to identify an approach which successfully combines and targets:-

- existing survey information and further quantitative and qualitative studies;
- contemporary retail intelligence nationally and locally.

## **OUTPUT**

Two copies of the report of the study will be provided together with a copy of all relevant background data for further analysis by the Council. The copyright of all data and reports will vest in the Council.

## **TIMESCALE**

The study is expected to take no longer than three months to complete. Anticipated start and completion dates to be further specified.

## **BUDGET**

All aspects of the study and liaison with the Council's Officers will be at a cost not greater than £15,000 including expenses but excluding VAT. Submissions in excess of this figure are unlikely to be successful.

## **DATA PROVISION**

Consultants will be required to clearly indicate any aspects of the study which will require input from the commissioning authority.

## **RESPONSE TO DRAFT BRIEF**

Written submissions from consultants confirming an interest in undertaking the study should include details of:

1. the proposed approach;
2. costs in total and a breakdown for different elements of the study;
3. timescales and programme for the study;
4. members of the study team and relevant experience;

5. the roles and responsibilities of the study team and a breakdown of costs; and
6. details of similar studies that have been undertaken, including experience in retail capacity assessment and town centre vitality and viability analysis.

### **DATA AVAILABILITY**

Reports held by the Council will be made available and these include the following:

- Retail Floorspace Surveys
- Angus Local Plan
- Draft Dundee and Angus Structure Plan and Report of Survey
- Previous (1995/96) Household Survey Results
- HBAS Research Papers on The Vitality and Viability of Historic Towns