

2019

District Centres Position Paper



Planning Team

City Development Department

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INTRODUCTION

A District Centres briefing session and discussions was held in April 2018, with a number of Elected Members attending. Since that time, ongoing monitoring has been carried out to capture any significant changes that might be taking place and to plan appropriate responses.

BACKGROUND

Town centres are recognised as a key element of the economic and social fabric of Scotland by the National Planning Framework. It is therefore important to support the role of town centres to enable them to thrive and meet the needs of the residents, businesses and visitors for the 21st century.

The town centre first principle promoted by Scottish Planning Policy (2014) supports an approach to wider decision-making that considers the health and vibrancy of town centres. This means that we should encourage a mix of uses in town centres to support their vibrancy, vitality and viability throughout the day and evening. In terms of retailing, development plans should identify a network of centres and explain how they can complement each other. The network can include city centres, town centres, local centres and commercial centres and may be organised as a hierarchy.

Within Dundee there is an established network of centres that includes the City Centre, District Centres and Commercial Centres. The District Centres are part of the historic development of the City and have played a vital role in meeting the needs for the surrounding local communities over many years. These have been supported and developed over the years by previous planning strategy and policies which have sought to reinforce their role within the recognised hierarchy. Together these centres seek to meet the needs of the population within the city and surrounding areas. In accordance with national policy, the Local Development Plan adopts a sequential town centre first approach when planning for uses which

generate significant footfall, including retail and commercial leisure uses, offices, community and cultural facilities. Over the years the Council has led investment in improving the public realm in five District Centres - Albert Street, Broughty Ferry, Hilltown, Lochee and Perth Road - to ensure that they continue to provide for the needs of the surrounding communities.

One of the growing threats to District Centres is the move of retailing and other businesses from the High Street to online formats and the competition from out of centre retailing. It is therefore important that the District Centres are developed in a manner that maintains and enhances their vibrancy, vitality and viability as sustainable shopping and service locations.

To maintain and enhance the health of the District Centres it is important that their main shopping areas retain a strong representation of key retailers and services. These main shopping areas are defined as District Centre Retail Frontage areas within the Dundee Local Development Plan 2019. The provision relating to this seeks to resist uses outwith Classes 1, 2 and 3 which would not contribute positively to maintaining the active retail offer. Outwith the defined frontage areas, proposals which help support the role and function of the District Centre are otherwise acceptable. This policy approach has been an effective mechanism in keeping vacancy levels across the Centres to relatively low levels over recent years, despite the pressures being experienced across the country in relation to the loss of retailers from the High Street.

Dundee's District Shopping Centres



DUNDEE RETAIL STUDY 2015

A full retail study was carried out by external consultants Roderick Maclean Associates Ltd in 2015 to inform preparation of the current Dundee Local Development Plan (2019) on key issues relating to retailing and town centres.

(https://www.dundee.gov.uk/sites/default/files/publications/CD_DundeeRetailStudy_Dec15.pdf)

The study looked at a wide range of retailing issues affecting the entire City and the District centres were subject to a summary health check. A summary of the findings is set out in Table 1 below.

From the study it was evidenced that there were various issues facing each of the individual district centres and some common issues across all centres. Each centre also had differing strengths and opportunities. Notwithstanding the issues noted there were no major issues identified affecting any individual district centre. Relative to centres elsewhere in Scotland, Dundee's district centres were performing well.

The Study indicated areas and opportunities for improvement that could be pursued for each centre. It is recognised that there have been changes to the centres since the 2015 Study. The following sections provide an update on each Centre since 2015.

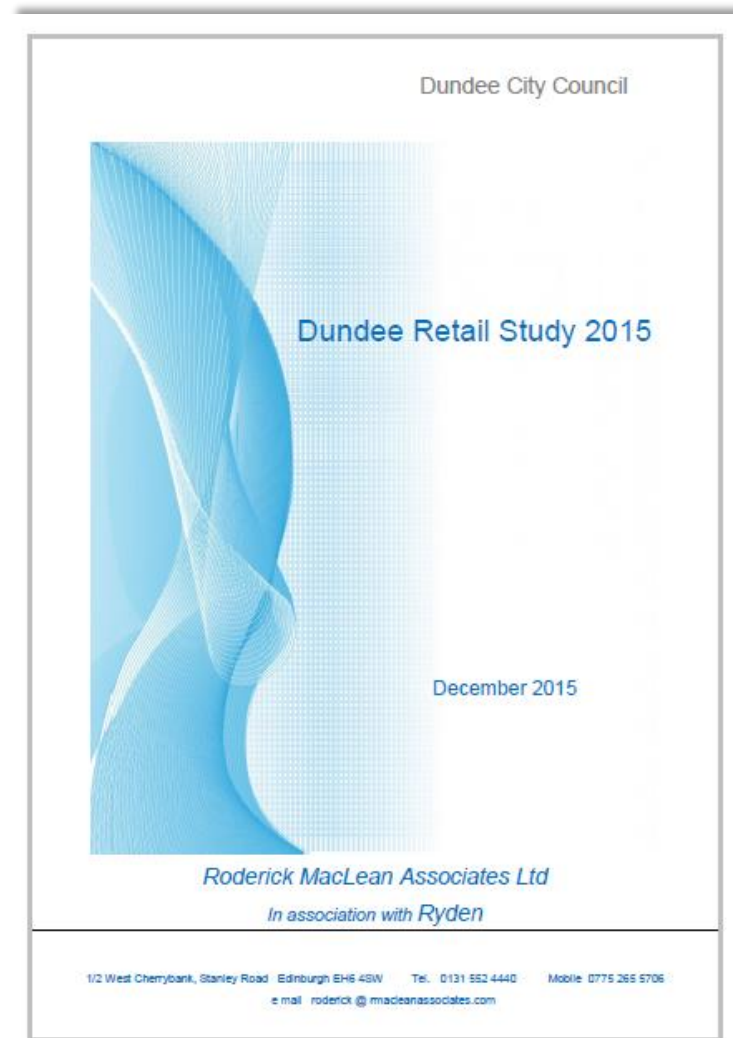


Table 1: Dundee Retail Study 2015 – District Centres Health check

	Strengths / Weaknesses / Opportunities / Threats	Vacancy Rate Commentary (2015)
ALBERT STREET	Has a fair mix of retail and non-retail uses which continue to provide a solid local service, with no evidence of decline. With few obvious physical opportunities for expansion, the main potential threat could be from any additional out of centre retail development arising in the vicinity.	The vacancy rate was quite low at 6%, indicating a broad balance between supply and demand for space. Main retailers include the Co-op and Boots.
BROUGHTY FERRY	Has a strong mix of quality retailing and non-retail services. It is trading well and it is popular with its local catchment, which is probably the most prosperous residential area of Dundee. There are few physical opportunities for expansion and no obvious threats to the District Centre, provided the quality of retailing is maintained.	The vacancy rate was minimal at less than 1%, indicating a balance between supply and demand for space, or even a potential demand for more space. Main retailers include M&S Simply Food, Boots, Semi-Chem, M&Co and Tesco Express.
HILLTOWN	Increases in the level of retail and non-retail floorspace indicates that Hilltown functions as a commercial location. Review of the level and distribution of vacant small units would be desirable, to assess whether changes in use could be considered. The level of comparison floorspace is rather dependent on one retailer (Dundee Market Traders).	The vacancy rate was quite high at 17% in terms of unit numbers, but not in terms of floorspace. The pattern was suggestive of there being too many small units for which there is limited demand.
LOCHEE	Increases in the level of retail floorspace indicates that Lochee functions successfully as a commercial location, but the quality of shopping is relatively poor, as is some of the general environment. Re-occupation of some of the vacant units would be desirable, especially with non-retail services to secure a more rounded balance with the retail offer. Improvements to the range and quality of shopping are needed, although it may be difficult to improve the convenience offer with the proximity of Aldi at The Stack.	The vacancy rate of 13% in terms of unit numbers was second to Hilltown, but 10% in terms of floorspace.
PERTH ROAD	The District Centre has a strong representation by small specialist retailers, especially in the comparison sector. Thus, in some ways it provides a sort of niche shopping offer. There is probably little room for change, as evidence of the mix of offer since 2009 demonstrates. Probably the main potential threat to the District Centre would be any significant loss among the specialist offer, which would reduce the overall attraction as a destination for this type of shopping. Potential threats could emerge from improvements to the range in the City Centre and from the internet.	The vacancy rate was minimal at less than 2%, indicating a balance between supply and demand for space. <i>NB: Vacancy rate refers to no of units</i>

DUNDEE CITY COUNCIL RETAIL BOOKLET 2017

In order to continually monitor the health of the District Centres a retail survey is carried out for each Centre within the Dundee City area on a biennial basis by in-house information team. In 2017, 1,886 units were surveyed ranging from local corner shops to food superstores. The information collected in the survey includes gross floor space, type of retailer and type of retail activity which are key indicators of an area's retail health.

As the survey was carried out in 2017, the findings represent the most up to date statistical retail information in relation to the District Centres.



Table 2: Updated health check of District Centres (Source: Dundee Retail Study 2015 & Dundee City Council Retail Booklet 2017)

	Dundee Retail Study 2015	Dundee City Council Retail Booklet 2017*		Comments including post 2017 updates
	Vacancy 2015 (% of total units in district centre)	Vacancy 2017 (% of total units in district centre)	Vacant units 2017 (number of units in district centre)	* data from 2017 DCC Retail booklet is subject to fluctuations in property
ALBERT STREET	6%	8.9%	8 units (90 total)	The vacancy rate for Albert Street is relatively stable over an increasingly challenging period. Some of the smaller sized units can be subject to a higher turnover level but the levels are within acceptable parameters.
BROUGHTY FERRY	1%	3.9%	5 units (129 total)	Two of the vacant units have been the subject of planning applications for the period 2018/2019 so it is likely that this level will be lower as new tenants begin to occupy.
HILLTOWN	17%	14.9%	17 units (114 total)	Hilltown still has a large number of small vacant units in various states of repair. The fire and demolition of the Main Street site whilst reducing vacant floorspace presents the opportunity for new development. The 2017 vacancy rate and high number of total units suggests that there are too many small units for which there is limited demand.
LOCHEE	13%	13.2%	10 units (76 total)	The vacancy rate for Lochee District Centre has been stable throughout this time period which is encouraging in the current economic climate. The Dundee Retail Study 2015 previously noted that the main potential threat to the Lochee District Centre would be situations arising where retail proposals at The Stack do not complement Lochee, but compete with it. The Dundee Local Development Plan 2019 responds to this by the designation of the entire Stack park as a 'Commercial Centre' within the Plan. This has the effect of restricting the goods range that can be sold from this location to those which will not directly compete with the District Centre. This does not appear to have had a negative impact to date on the centre.
PERTH ROAD	2%	8.6%	6 units (70 total)	The vacancy rates for the period 2017 relate to a time when Perth Road experienced closure of the main Foodstore and the banks. The Foodstore and other vacant units are now occupied and there have now been planning applications approved seeking new commercial uses for some of the other vacant units. It is likely that the 2019 figures will have reduced reflect these positive changes.

Table 3: Large units within District Centres (Source: Dundee City Council Retail Booklet 2017)

This table provides details of the large units (over 800sqm) within each of the District Centres. These can often make a significant contribution towards footfall, expenditure and total floor space across a District Centre and are therefore important markers of performance.

	Fascia	Address	Classification And Use	District Centres Total Floor Space (Sq.m.)	Unit Floor Space As % Of DC	Unit Floor Space (Sq.m.)
ALBERT STREET	Co-Op	93-99 Albert Street	Convenience	7,426	19.4%	1443
BROUGHTY FERRY	Gillies	176-180 Brook St	Comparison	17,282	12.7%	2200
	M&S Food	114 Brook St	Convenience	17,282	9.8%	1690
HILLTOWN	* Hilltown Park – Dundee Market Traders and Recyclers	Main Street	Comparison	13,461	24.5%	3295
	* Fit4less	Main Street	Non retail	13,461	10%	1350
LOCHEE	The Range	Unit 8, The Stack	Comparison	15,184	31%	4726
PERTH ROAD	Greens	274 Perth Road	Convenience	7,119	11.7%	835

* Note: these units are to be demolished due to significant fire damage

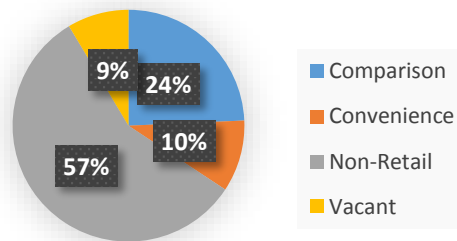
Breakdown of District Centre floor space

It is considered that the District Centres each provide a good choice of convenience and comparison goods. The areas mostly have at least one large food store, (although not always within the defined centre) and are supported by a range of facilities

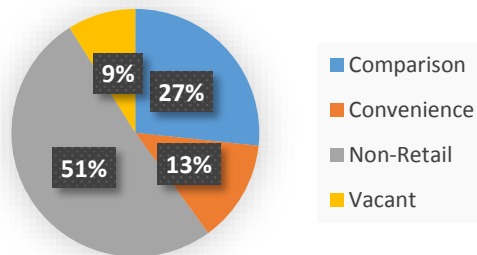
Town centres across the country have seen a shift away from traditional retail formats to include a wider range of uses. This can be seen in each of the District Centres where they each provide a large proportion of non-retail units including public houses, beauty salons, estate agents, banks etc. These premises could potentially be used for retail purposes in the future and may have been in the past.

Broughty Ferry is notable by the high levels of comparison goods being sold and this can be largely attributed to independent retailers in that location.

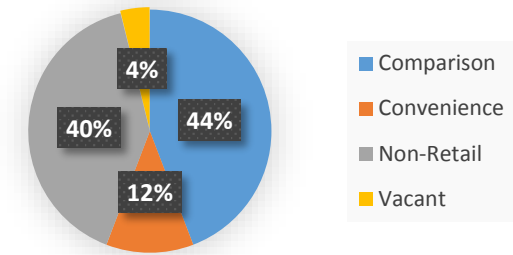
**Perth Road District Centre -
classification of uses**



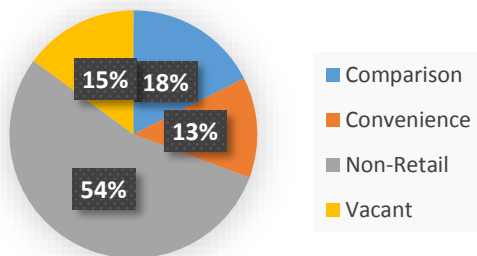
**Albert Street District Centre -
classification of uses**



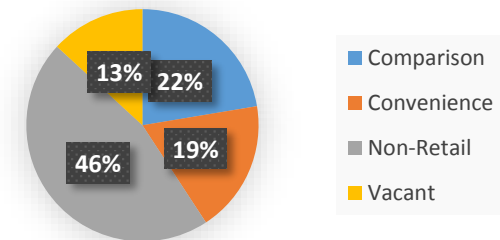
**Broughty Ferry District Centre -
classification of units**



**Hilltown District Centre -
classification of units**



**Lochee District Centre -
classification of uses**



(Source: Dundee City Council Retail Booklet 2017)

OBSERVATIONS SINCE 2017

Significant changes in vacant floor space at ground level has been monitored throughout this period prior to a 2019 Retail Survey taking place. Information regarding 'large units' of 800sqm and above has been reviewed. The District Centre where there has been a significant change in overall floor space relates to the units on Main Street in the Hilltown. This has been as a result of a serious fire in September 2018 which will require the demolition of the building.

It should also be noted that The Range located within the Stack at Lochee District Centre will form part of a new Commercial Centre upon adoption of the Dundee Local Development Plan 2019 so the overall figures will alter in relation to Lochee District Centre.

With the above exceptions, there has been a period of relative stability in terms of vacant floor space across the District Centres. In general we are seeing a broader range of service based facilities within the District Centres affecting smaller sized units, reflecting nationwide trends in relation to retail/service sectors.

Table 4 below provides observations across each of the District Centres from 2018 onwards.

Table 4: District Centre observations for period 2018/19

	2018/19 OBSERVATIONS
ALBERT STREET	In Albert Street some longer term vacancies do exist and there is a regular churn of smaller units as businesses move on and the premises are re-let to new occupiers. Council led investment in property facades is evident. The area remains popular as a location for services such as salons.
BROUGHTY FERRY	Broughty Ferry remains healthy with some small vacancies largely due to premises being let to new occupiers. Business premises here remain in high demand as the Ferry's reputation as a place to live and visit continues to grow.
HILLTOWN	Hilltown still has a large number of small vacant units in various states of repair. The fire and demolition of the Main Street site whilst reducing vacant floorspace presents the opportunity for new development. When drafting the Dundee Local Development Plan 2019 consideration was given to reducing the extent of this district centre boundary. It was agreed to retain it in its current form and to make no changes to the retail frontage. This was due to the housing developments planned in the Coldside ward which will see some 300 new homes built by 2020. The future of the Main Street site will need to be considered over the near future.
LOCHEE	The final phase of the masterplan for the Lochee district centre is still to be completed with two large vacant development areas causing a temporary negative impact on the appearance of the district centre. The physical regeneration activities in the wider Lochee area have increased the population within the catchment area. There continues to be turnover of smaller units as businesses come and go. The medium sized unit on Flights Lane remains vacant. The careful management of the uses and size of units that have been permitted within the Stack has meant that they complement rather than compete with the district centre.
PERTH ROAD	The spike in vacancies on Perth Road in 2015-16 has largely subsided as those vacant properties have been reoccupied. Planning applications have also been submitted seeking new commercial uses for some of the vacant units. The council led strategy for the area will deliver some minor public realm improvements.

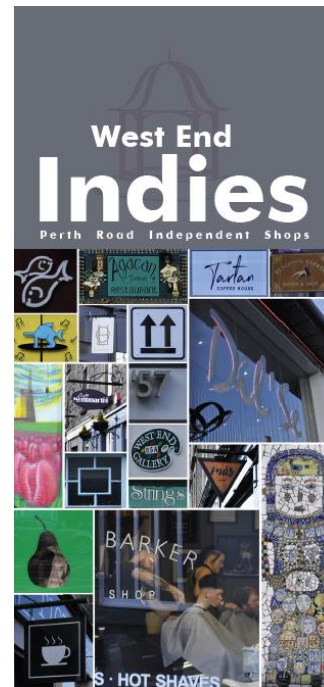
LOOKING AHEAD

The ongoing monitoring of the district centres highlights that whilst they are all going through a period of relative stability there remain opportunities to undertake some physical improvements and to promote each district centre to its local area and beyond. To attract more businesses and visitors to the district centres the promotion should focus on understanding and promoting the distinctive role and function of each centre.

An example of this is the production of the Perth Road District Centre Retail and Urban Realm Enhancement Strategy. The survey stage of this project saw the completion of a SWOT exercise and public consultation event. Analysis of this information generated outcomes that were grouped into promotional, physical and parking outcomes. A series of project ideas were generated and a promotional 'West End Indies' leaflet was prepared highlighting the high number of small independent businesses within Perth Road. A successful bid to the Dundee Decides community participatory budget has provided £30,000 funding to allow some physical projects to take place which will help to improve the appearance of the street and create an identity for this unique district centre.

Elements of this strategy could be applied to the other district centres in order to tackle a range of physical issues and to better promote the areas to the local catchment and to a wider audience. Careful consideration of the distinct character and role and function of each area could generate a particular theme that could be used to brand and promote the area. For example the range of ethnic food shops within the Hilltown or the salons on Albert Street could be highlighted and promoted through leaflets, apps and events. Physical works such as 'welcome to' signs or lighting schemes could help to create a clear identity or brand for the centres.

As with previous physical regeneration projects physical improvements could be combined with planned road, footway and lighting maintenance. This best value approach could be as simple as combining works to minimise disruption to traders or extend to enhanced materials or redesign of roads and footways to make the place better for shoppers.



COUNCIL INVESTMENT IN DISTRICT CENTRES

The city council has invested in physical regeneration initiatives in the district centres over the last 20 years. These works have been largely funded from external sources and are a mix of environmental improvements to roads and footways, and grant based schemes such as façade enhancement grant schemes.

Work is ongoing within the Perth Road District Centre to put in place signage and other features to promote the area as a retail and leisure destination. This was funded through the successful Dundee Decides participatory budgeting project in 2018.

The council through its own maintenance programmes has some limited works to footways and roads in the district centres over the next few years.

DCC LED REGENERATION INVESTMENT IN DISTRICT CENTRES SINCE 2008

The District Centres have been the focus for a wide range of physical regeneration initiatives over the last decade.

Table 5: Recent Regeneration Expenditure in District Centres (Source: Various)

	Total Expenditure 2008-2018	Comments
ALBERT STREET	£174,000	Vacant & Derelict Land Fund (VDLF) funded Environmental Improvements (EIs) and Compulsory Purchase Order. There was around £1.2m of investment in the period 2000-07 in façade enhancement, arterial road improvements and compulsory purchase in support of the Stobswell Regeneration Strategy.
BROUGHTY FERRY	£0	The £400,000 works to the district centre took place in 2004.
HILLTOWN	£1,218,000	Façade Enhancement Grant Scheme, Hilltown Park, VDLF funded EIs
LOCHEE	£5,977,000	High Street EIs, Bank Street, Community Hub
PERTH ROAD	£0	The Dundee Decides funded works will see £30,000 spend in 2018-19.

DCC PLANNED MAINTENANCE IN DISTRICT CENTRES

Road Maintenance Partnership and Street Lighting have provided details of the planned expenditure within the district centres over the next 5 years. This may present opportunities for adding value to planned maintenance through use of better materials or for redesigning public realm.

Table 6: Planned maintenance over next 5 years (Source: Dundee Roads Maintenance Partnership GIS Layer 2018 / Street Lighting)

	Planned Road Maintenance (Note: none planned beyond 2021)		Planned Footway Maintenance (Note: None planned for 2019 or beyond 2021)		Planned Street Lighting Maintenance
	2019	2020	2020	2021	
ALBERT STREET		Dura Street – surface dress			Street Lighting Partnership Manager confirmed that no works are planned in any district centre over the next 5 years. This is to be reviewed in 2020/21.
BROUGHTY FERRY	Fort Street – resurface	Gray Street – resurface			
HILLTOWN			Paterson Street – setts part reconstruction	Strathmartine Road – footway overlay; Hilltown Parks – footway overlay	
LOCHEE				High Street (west side south of Bank Street junction) – slab replacement	
PERTH ROAD				Mid Wynd – resurface	

LOCAL COMMUNITY PLANS

Some of the Local Community Plans for the areas containing district centres contain actions that relate to potential capital spend within the district centre. These are summarised in the table below.

Table 7: Local Community Plan Analysis (Source: Local Community Plans 2017-2022)

ALBERT STREET (MARYFIELD)	Carry-out regular checks on the maintenance of parks, streets, green and open spaces, DDC and Housing Association housing areas with a view to improvement.	Develop a plan for the Albert Street area focussing on street furniture, commerce, housing, travel, lighting and social space.
BROUGHTY FERRY (THE FERRY)	None	
HILLTOWN (COLDSIDE)	Residents indicate a general decrease in the level of maintenance in Coldside Ward and the poor quality of green spaces, roads and footways.	
LOCHEE (LOCHEE)	Make Lochee High Street a more attractive place to shop and invest by re-establishing the Lochee Traders Forum and improve physical environment and appearance of Lochee High Street and surrounding area.	Increase active travel opportunities, especially cycling and walking routes.
PERTH ROAD (WEST END)	Develop proposals to enhance the shopping environment of the Perth Road; including signage, seating areas, pavements and street furniture.	Need to free up parking spaces taken up by 'park and stride'