Aylesbury Vale Retail Impact Thresholds

Aylesbury Vale District Council

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Prepared by

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1 INTRODUCTION

1.1 Aylesbury Vale District Council approached GL Hearn to advise on the potential to set a local threshold for inclusion within the Vale of Aylesbury Local Plan.

1.2 In order to consider the potential to set a local threshold for the purposes of considering retail proposals, this report seeks to consider the following interrelated matters:

- Policy overview;
- Development trends;
- Health of existing centres;
- Existing town centre floorspace characteristics; and
- Recent retail proposals.

2 POLICY OVERVIEW

2.1 The Vale of Aylesbury Local Plan (VALP) is being prepared in line with the National Planning Policy Framework (NPPF) and the National Planning Practice Guidance (PPG). The NPPF provides guidance for Council's when considering setting a locally appropriate threshold.

National Guidance

2.2 Paragraph 23 of the NPPF identifies a series of elements which Local Planning Authorities should consider when preparing Local Plans. These include:

- recognising town centres as the heart of their communities and pursue policies to support their viability and vitality; and
- setting policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

2.3 Following on from this are a number of paragraphs which identify how planning applications should be considered. Paragraph 24 identifies that:

Local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan.

2.4 Thereafter paragraph 26 states;

When assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq m).

2.5 The NPPG provides further guidance on the application of the NPPF. Paragraph: 016 Reference ID: 2b-016-20140306 identifies "when should the impact test be used?" This identifies that:

In setting a locally appropriate threshold it will be important to consider the following:

- *scale of proposals relative to town centres*
- *the existing viability and vitality of town centres*
- *cumulative effects of recent developments*
- *whether local town centres are vulnerable*
- *likely effects of development on any town centre strategy*
- *impact on any other planned investment*

Local Policies

2.6 The introduction to the Vale of Aylesbury Local Plan (VALP) Draft for Summer Consultation 2016 explains that retail development needs to keep pace with the growth in the population, and key retail locations such as Aylesbury's town centre need to develop to meet the needs of the expanding population. The draft plan seeks to maintain Aylesbury town centre's position and allow for organic growth to match future housing developments. With the assistance of neighbourhood plans, the Council will also be aiming to protect and enhance its existing town and village centres.

2.7 Draft Policy S2 identifies the spatial strategy for growth and this expects that the Local Plan will make provision for the delivery of 2,674sqm of convenience floor space and 16,048sqm of comparison floor space over the period to 2033. The comparison figure is a district-wide target, but it is the Council's intention to focus new comparison retailing at Aylesbury as the main focus for shopping in the district.

2.8 In terms of retail policies, Draft Policy D10 supports the growth and expansion of town and local centres consistent with the existing retail hierarchy. In terms of local and village centres, proposals which provide access to jobs or homes and convenient access to everyday shops, services and local community facilities will be supported, provided the proposal is of an appropriate scale and does not compromise the character of the area and the functionality of the centre.

2.9 Elsewhere Draft Policy E5 relates to development outside of town centres. The current wording of this policy does not refer to a local floorspace threshold, but paragraph 6.15 states that:

> *The council intends to set a local floor space threshold above which an impact assessment would be required to accompany proposals for main town centre uses outside town centres. The council will commission further retail evidence to determine appropriate local thresholds based on past planning applications of this nature.*

3 RETAIL DEVELOPMENT TRENDS

3.1 This section briefly considerers the main drivers and trends in retail and commercial leisure within the UK. The analysis draws upon a number of published data sources including; Goad Plan data, Experian, BCSC, Family Expenditure Survey, Centre for Retail Research, BFI and Mintel.

3.2 The internet and advances in mobile technology are increasingly affecting shopping behaviour. The pace of growth in non-store retailing is starting to slow but is still expected to outpace the growth in traditional retail expenditure in the short to medium-term.

3.3 Home delivery (or 'store-to door') has become very common in the convenience sector, where goods are sourced from stores with a physical presence. While the spend might end up as turnover in the same store, such transactions do not translate to activity on the high street and remove the potential for linked shopping, this trend is undermining the anchoring role that large foodstore operators traditionally fulfil in well-configured centres.

3.4 Home delivery of comparison goods are commonly sourced from far afield (possibly even abroad), the steepening of this trend results in increased leakage and reduces the volume of available expenditure that can support local traders on the high street.

Convenience Shopping

3.5 The pace of expansion of convenience operator representation has slowed dramatically with major foodstores effectively stopping their drive for large format stores. Small convenience stores have proliferated more recently with Tesco, Sainsbury's, Morrison's and Co-op all competing for suitable sites in town centres and accessible out-of-centre locations.

3.6 The changing UK demographics are also having a major impact on the food and grocery sector. There is a move back to city centres, especially among younger people who are 'time poor' and relatively 'cash rich'. These city centre dwellers are much less likely to own a car and so also much less likely to use a food superstore on a regular basis

3.7 Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking to open a variety of stores with a particular current focus on small convenience stores. Typically these have a floorspace less than 280 sqm (net) in order that they are not subject to Sunday Trading restrictions.

3.8 Mintel identifies that the recession – allied with a period of higher inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers, and more shoppers are assessing whether purchases represent value for money. This change in customer behaviour is fuelling the growth in the ‘discounters’ namely Aldi and Lidl. These stores are gaining share because they have made a small, but significant move to the middle ground of food retailing, with wider ranges, much better fresh foods, some branded products and some premium lines. Their main attraction remains value for money (and not just low prices). The German chains Aldi and Lidl are growing at their fastest rate in more than two years. The latest data shows that Aldi’s sales have risen by 19.8% and Lidl’s sales have risen by 18.3% over the 12 weeks to 21 May 2017 against a rise in grocery market inflation of 2.9%.

3.9 These medium size supermarkets have seen a growth in the number of stores, not only for the discounters mentioned above as well Iceland’s Food Warehouse as customers move towards value, but also at the premium end of the spectrum where Marks and Spencer Simply Food and Waitrose are growing their food estate. The growth in medium sized stores provides shoppers with a reasonable range of goods, more comprehensive than the smaller convenience stores, without the need to need to visit a superstore just to collect a few staple items such as milk and bread or enough for an evening meal.

Comparison Shopping

3.10 Comparison retailing has been greatly affected by the economic cycle in recent years. A number of high street retailers have fallen into administration in recent years (Comet, Jessops, Blockbuster, HMV, Borders, JJB Sports, Woolworths, Game, Peacocks, Firetrap, Habitat, Barratts, Past Times and Clinton Cards. BHS were the most significant casualty of 2016) leaving vacancies in town centres across the country. However comparison expenditure is set to improve over the coming years as the UK advances further out of recession, such that the departure of national multiple retailers has created opportunities for independent retailers by removing strong competition and freeing up well situated premises for occupation.

3.11 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct have also expanded out-of-centre. There has also been a significant growth in the value operators such as Home Bargains, B&M Bargains and The Range.

3.12 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres.

Summary

3.13 Recent trends in the convenience market have been towards smaller ‘discounter’ supermarkets, typically less than the 2,500 sqm threshold identified in the NPPF. These include the smaller local convenience stores less than 280 sqm net, but also the medium supermarkets operated principally by the discounters and the higher end operators.

3.14 In terms of recent comparison trends these have seen the rationalisation of larger bulky goods warehousing, with some comparison stores moving out of centres to occupy this floorspace. At the same time national retailers are typically consolidating their portfolios but into larger shop units in higher order centres.

4 HEALTH OF EXISTING CENTRES

4.1 GL Hearn has not been commissioned to undertake vitality and viability assessment of the centres within Aylesbury Vale. However the Retail Group have prepared a number of supporting studies for the Council including the Aylesbury Town Centre Growth Opportunity Assessment Study (November 2016) and a review of Buckingham Town Centre (December 2016), both of which provide some details as to the health of centres. In addition to this a Local Centres Health and Outlook Report has been prepared covering

- Fairford Leys
- Walton Court
- Parton Road
- Jansel Square.

4.2 These assessments do not cover Wendover, Haddenham and Winslow.

4.3 Below is a summary of the centres assessed:

Aylesbury

4.4 The Aylesbury town centre retail review was undertaken towards the end of July 2016. The Review included the core town centre area plus Aylesbury Shopping Park, Vale Retail Park and B&Q, with the purpose being to identify the current mix and positioning of the offer, its customer appeal and any deterrents. This identified that:

- The retail offer is focused around Market Square and the streets running off it; it includes the two shopping centres; Friars Square and Hale Leys and supporting retail parks
- Both shopping centres have seen recent improvements; in particular Friars Square
- Town centre anchors / major stores include House of Fraser, M&S, Wilko, QD, Sainsbury's and the market; plus Waitrose albeit not fully integrated to the town centre offer
- A number of the anchor stores are small scale and older in fit out and format, in particular House of Fraser; they also have limited impact and tend to feel hidden rather than promoted
- The town centre is visibly busy, the market and other events adding vibrancy to the town centre
- The retail offer is main stream and mass market in focus; there is very little for more discerning consumers
- The leisure and supporting retail around the cinema and the theatre are good quality, with a good selection of quality F&B located in a cluster, creating impact; Wagamama, Nando's, GBK and Costa
- Other F&B around the town centre is largely mass market and feels dispersed, in particular the locations of Pizza Express and Prezzo; while located with other F&B and leisure operators they feel away from the main drag
- The town centre environment is poor in a number of instances; condition of pavements and paving, signage and rubbish collection, all reduce the appeal of the town centre
- The town centre overall feels disjointed and difficult to shop, it has evolved and grown organically over time, but as a result feels unplanned, lacking collective appeal and presenting a 'poor face' in a number of instances; service yards and large dead frontages / side returns

- There are a few vacancies in evidence around the town, but they tend to be dotted around and therefore does not feel blighted by vacancies as many locations can do
- The hanging baskets and planting on approach roads around the town centre, namely Exchange Street project a quality image, higher and better than in the town centre itself
- Opportunities to improve signage and orientation with a stronger focus on 'shopping' messages and integration of different parts of the offer
- Access by car is good, with opportunities to improve directional signage to 'shopper' car parks; the environment and appeal of car parks is mixed
- While well served by buses the bus station is dark and unappealing, the information centre was unmanned and looked disused
- The town benefits from a number of leisure anchors, including; Aquavale, Cinema, Theatre and the Roald Dahl Museum
- While very close by geographically the leisure operators feel disconnected, despite their proximity to the town centre
- There is a wide range of charity shops in the town centre, including a British Heart Foundation homewares and electricals shop, mostly located in secondary areas of the town centre

4.5 The report also provided a SWOT analysis which concluded:

Strengths

- Good size catchment
- High quality catchment profile
- High spending customer groups
- Population is growing
- Proven additional consumer groups and inflow
- New recent quality development sets the benchmark
- Environment has character in parts
- Good transport and easy access
- Broad and established leisure
- Frequent, regular visits
- Events and market activity

Weaknesses

- Limitations of retail offer
- Limitations of F&B offer
- Layout of town centre
- Environment of town centre
- Lack of integration
- Low impact and statement
- Unit sizes
- Anchor store sizes
- Perception
- Piecemeal components
- Low appeal to quality residents
- Under-delivering for current consumers

Opportunities

- Population and catchment growth; forecast continued growth is well documented
- Development opportunities
- Recent additions raise the bar and expectation
- Support of retailers, stakeholders and consumers –*they want more, they want better*
- Lots of room to grow retail and F&B offers
- Clear quantitative and qualitative opportunity
- Different consumers are in the town centre already for different reasons; how can they be encouraged to stay longer, use more, return
- Visit frequency, loyalty

Threats

- Under-achieving with the current offer
- Continued strengthening of nearby and competing centres
- Not capitalising on recent development and investment
- Will significantly under deliver vs. future town centre aspiration
- Fast changing retail environment and consumer behaviour is continuing to raise the bar in terms of retail needs and expectations
- Increasing expenditure leakage online and elsewhere
- Falling further behind through failure to evolve; inactivity

4.6 Overall, it appears as though Aylesbury adequately serves a mainstream/mass market both from a retail and a food and beverage perspective, which generates reasonable footfall. Although some aspects of the centre could be improved, such as the layout and overall environment could be improved and the quality of some operators (both retail and food and beverage), overall Aylesbury benefits from being the highest order centre in Aylesbury Vale with a range of uses and attractors such as the market, cinema, theatre and museum.

Buckingham Town Centre

4.7 In November 2016, The Retail Group was commissioned by Aylesbury Vale District Council to undertake a town centre retail appraisal, health and opportunities assessment for Buckingham Town Centre.

4.8 The background and introduction to the report identifies that Buckingham is a traditional small market town, it still has a market operating on two days per week, plus a regular flea market and an annual destination event ‘fair’. Its strengths are reported as including the historic quality / heritage of the town centre environment and a range of independent retailers and it is the second largest centre in the AVDC district.

4.9 The town has recently completed a Neighbourhood Plan (BNDP) which includes identified aspirations for the retail offer to improve and even to grow in light of established and identified housing and population growth. However the aspirations for the retail offer are secondary to a number of other town centre improvement areas such as parking.

4.10 The core shopping area is concentrated in the two shopping precincts; Cornwall Place and Meadows Row and on Market Hill on the opposite side of the road.

4.11 The location of the retail offer in the two precincts and Waitrose behind them means that much of the retail offer is hidden from view. In terms of the retail mix, this is dominated by service operators at over a third of units, a mixture of both multiples and independents with a high number of hair and beauty operators and estate agents.

4.12 The number of vacant units was identified to be low in comparison to many town centres and indicates that the town centre is holding its own pretty well in difficult economic circumstances.

4.13 Waitrose dominates the town centre convenience offer and also serves to anchor the town centre offer as a whole. The convenience goods offer also includes a Tesco Express and a Sainsbury's Local on the periphery of the town centre.

4.14 The comparison goods offer is primarily dominated by independent operators with a limited multiples present, including; M&Co, WH Smith, Boots, Charles Clinkard and Kids at Clinks.

4.15 While there are number of charity shops catering for value seeking consumers there are a number of operators with a mid to upmarket product offer, e.g. Kids at Clinks, Dandy Lions and Buckingham Tailors.

4.16 The catering offer is primarily independents with Prezzo Subway and Esquire's the only multiples present.

4.17 Access by car is good with the town centre located close to the main arterial routes. There is a surface level car park behind Waitrose which is the main shopper car park in the town centre. The car park is well used almost fully occupied by late morning on the day of the review, on street parking mostly on Market Hill was also well occupied, very few spaces available. There are also a number of bus routes running to and from the town centre with bus stops primarily located adjacent to the Hospital.

4.18 The broad service offer and other facilities in the town centre including the Library, Registrar, Town Council offices, Community Hospital, Doctor's surgeries and dental practices also attract visitors to the town centre. In addition to this there is also a market in the town centre on Tuesdays and Saturdays.

4.19 In terms of leisure, the town centre has a small scale visitor attraction and Museum; Buckingham Gaol, adding to the history and character of the town centre. In addition there is a small National Trust property Chantry Chapel with second hand bookshop and tea room.

4.20 There are also two hotels located in the town centre; Villiers a 4-star hotel with 49-bedrooms and ballroom / conference centre and the 18-bedroom White Hart an 18th century coaching inn.

4.21 The study identified that Buckingham has many positive indicators of health, with many of the building blocks for future growth in place, it has appeared to prove fairly resilient in the continued uncertain retail climate. Key indicators identified include:

- High convenience expenditure retention
- Visit patterns are frequent
- Waitrose is town centre anchor
- Restaurants are well used by core catchment
- Food shopping (top-up primarily) is an important visit driver
- Buckingham is fulfilling a social (as well as general shopping) role
- Market(s) are attractors
- Long standing and newer operators trading
- Bias towards those trading ‘up’ on the year
- Operators consider their businesses successful (30:1)
- Vast majority plan to remain in Buckingham
- Retail offer dominated by service, driving frequent usage
- Vacancies on the whole are limited
- Evidence of independents targeting a mid market, quality consumer
- Good access and connectivity
- Shopper parking is well used
- Residential areas in and around the town centre
- Retailer motivation appears good
- Evidence of new arrivals and a strong established base
- Second largest centre in the District
- Aspirations for growth
- Desire for retail development

4.22 While Buckingham has many positive indicators of health the study has also identified a number of factors that are potentially limiting performance now and / or in the future. These include

- Low comparison expenditure retention
- Visits are short
- Convenience goods high usage but is largely ‘out of town’

- Milton Keynes dominates in terms for comparison goods
- Choice of shops and facilities are low in terms of reason for visit
- Town not viewed as successful as individual businesses (only 2:1 positive ratio)
- Variable footfall, possibly location dependent
- Future outlook skewed slightly towards the negative
- Number of 'gaps' in retail offer identified
- Multiples are limited in number and size, and impact
- Over dominance of some types of operator; health and beauty salons / operators, estate agents and charity shops
- Retail offer lacks impact
- Lack of modern retail units that would appeal to multiples
- Multiples present are smaller than average
- Half day / Wednesday closing
- Non-retail in high visibility locations
- Vacancies but typically in secondary / tertiary locations

4.23 Overall the report concluded that the positive indicators outweigh the negative factors for Buckingham. The town is in reasonably good health and is well positioned to remain robust going forward. There are opportunities to help it continue to trade positively and many can be facilitated by the Council, although only a few are completely within their control.

Fairfield Leys

4.24 Fairford Leys local centre was created as part of a new district / housing development around the turn of the century (late 1990s) judging by the look of the architecture and surrounding housing stock.

4.25 The shops are located around a small square and on the roads leading to the square. There are circa 15 'shops' although not all are traditional retail uses. The centre is anchored by a small Co-op. The centre is clearly signposted from nearby routes, although as a 'Village Centre'. The centre benefits from additional non-retail anchors, the Church and the Fairford Leys Centre. The retail provision at the centre is dominated by service providers and food and beverage outlets.

4.26 There are no visible long term vacant units or vacant plots. Indeed the two recent new openings result in all units looking occupied and trading.

4.27 A couple of operators were closed on the day of the review or had finished that day part trading activity.

4.28 The centre is visually dominated by food and beverage operators, including a Chinese Brasserie, an Indian restaurant and takeaway, eat-in and takeaway fish and chip shop, a Chinese takeaway and a gift / coffee shop.

4.29 The small Co-op food store (convenience size) anchors the retail offer. The spread of service providers includes; optician, dentist (x2), dry cleaners and hair / beauty offers. They provide a collective anchor and evidence of a regular customer base.

4.30 The positive indicators of good health include;

- High occupancy
- Busy parking areas
- New businesses
- Non-retail anchors; Church, Fairford Leys Centre, Dental Centre and Dentist
- Positive comments from new and established operators.

4.31 There are no negative indicators.

4.32 In summary Fairfield Leys was accepted to be a centre in good health; although potential improvements exist for signage, more extensive cleaning, more customer facilities and better car parking management

Walton Court Local Centre

4.33 Walton Court is a compact local centre. The centre was completely redeveloped circa 3 years ago. The retail units all trade at the front of a mixed use / multi-level development. Above and behind the retail units is a residential development of 2-3 stories. At the back of the development is the Healthy Living Centre, which acts as an anchor and a small nursery.

4.34 There are currently five units trading and two vacant units (vacant since the redevelopment 3 years ago), although hair salon a new opening.

4.35 The centre is anchored by a small convenience sized Co-op with Post Office counter and a very small Boots. There is also a doctor's surgery next to the centre.

4.36 Parking is to the side of the centre and a few spaces outside the front. The retail offer is set below the level of the car park and road with steps down and a disabled / access ramp.

4.37 The businesses that are in situ are positive yet there remain two visible vacant units. The external condition of these two vacant units reduces the impact and vitality of the area. Maybe a 'meanwhile use' or improved graphics would be beneficial.

4.38 The centre is anchored by a small Co-op convenience store and a very small Boots, which faces the doctor's surgery. The hair salon / barbers is a recent addition and the fish and chip shop is very new.

4.39 In summary a compact centre that is in the process of re-establishing its offer. It would benefit from improved signage, improved shopper facilities and making a stronger statement about its offer and mix.

Parton Road Local Centre

4.40 Parton Road local centre is located off the A41 access road to / from Aylesbury Town Centre. It is an established district centre adjacent to a major local school. The centre is split by the access road to the school and surrounding residential areas. It is in the form of a traditional parade with three blocks of retail. There is limited parking in front of the shops, along the roadway and to the side of the first block of shops. The centre has very limited, if any, visibility from the A41. There is a large nursery school development underway (possibly stalled) that obscures the view. The signage for the centre does not stand out, indeed from one direction there is no signage.

4.41 The centre includes 12 shops and is anchored by a small Co-op convenience store. It has a selection of convenience stores, service providers and three food and beverage outlets, plus a selection of service providers (barbers, beauty / hair, betting and a cartridge / print specialist) a café, two takeaways and a vacant unit.

4.42 Parton Road local centre was considered to be a little tired and unloved. The car park surface is poor and the 'no lorries' sign is a visible negative statement and a possibly wider deterrent. The directional signage and sense of arrival could be much better and more overtly shopper friendly.

4.43 That said the centre is well occupied and had a healthy flow of custom during the review. Retailers are friendly, welcoming and keen for business.

4.44 Parton Road is an established centre that needs a little spruce up to help it achieve and maintain its potential. If there are opportunities to improve the parking surface (not under Council ownership), the road surface and footpaths these would underpin improvements.

Jansel Square Local centre

4.45 Jansel Square is an established local centre. It operates from two parades of shops (with residential above) and is bordered by a Sainsbury's Local and an established pub, the Buckinghamshire Yeoman.

4.46 The shops are set back from the main road Camborne Avenue and as such the centre has reduced impact and visibility. Car parking is ‘out front’ with the shops behind and whilst the car parking is visible from Camborne Avenue the access is not direct from it.

4.47 Camborne Avenue connects two major access roads from the south east quarter into Aylesbury; the A41 and the A413.

4.48 Jansel Square local centre would appear to be in reasonably good health. The centre benefits from critical mass in terms of the offer and a good spread across the core categories. There are a couple of vacant units one of which is already being refurbished for a new tenant that will further add to the appeal and attraction of the centre; a Co-op food store (to replace Budgens) with a Costa Coffee also set to join the mix in a new unit.

4.49 The centre will have two branded small food stores as anchors and also benefits from a selection of non-retail anchors.

4.50 In summary Jansel Square is a well-established centre that has more strong retail brands arriving. It appears to be trading well and is in reasonably good health. It would benefit from improved facilities and a better cleaning / maintenance regime.

Summary

4.51 Overall the centres identified above appear to relatively healthy. The Local Centres of Walton Court and Parton Road would require the most protection from potential out of centre retail developments given that there is an identified requirement to re-establish or improve their perception to fulfil their full potential.

5 EXISTING FLOORSPACE CHARACTERISTICS

5.1 In order to expand on the information on the health of centres presented above, further retail floorspace information has been obtained from GOAD.

5.2 GOAD information is available for the three largest centres of Aylesbury, Buckingham and Wendover.

5.3 The tables below identify the unit breakdown for the centres as identified by GOAD from their latest centre surveys for Buckingham (24/09/2015), Aylesbury (21/12/2015) and Wendover (12/11/2015). This identifies that A1 retailing uses are the most prominent uses in all of the centres.

Table 1: Centre Composition Analysis

Units	Aylesbury	Buckingham	Wendover
A1 Comparison	99	52	15
A1 Convenience	21	10	6
Retail Services	44	22	11
Leisure Services	76	27	12
Financial and Business Services	50	22	10
Vacant	51	8	3
Total	341	141	57

Source: GOAD

5.4 From the units within the various use classes, floorspace data has been identified in the table below. The information provided by GOAD is a gross floorspace figure

Table 2: Composition Analysis – Gross Floorspace (sq m)

Floorspace	Aylesbury	Buckingham	Wendover
A1 comparison	28,604	4,905	1,328
A1 convenience	13,749	2,368	1,040
Retail Service	3,409	1,616	780
Leisure Service	16,127	5,425	1,793
Financial and business service	22,584	2,443	771
Vacant	6,243	873	307
Total	90,716	17,648	6,019

Source: GOAD

5.5 Comparing the number of units and the associated floorspace within that use class, provides an indication of the average gross size of retail unit. This is provided in Table 3 below:

Table 3: Composition Analysis – Average unit size (sq m)

	Aylesbury	Buckingham	Wendover	Average
A1 Comparison	289	94	89	210
A1 Convenience	655	237	173	464
Retail Services	77	73	71	75
Leisure Services	212	201	149	203
Financial and Business Services	452	111	77	297
Vacant	122	109	102	120
Average	266	125	106	212

5.6 The average size of the units within the centres is broadly similar for Buckingham and Wendover at 125sqm and 106sqm respectively. Aylesbury is over double these sizes at 266sqm, but this is not unexpected given that it is the largest centre in the district. When focusing on the convenience and comparison elements of the centres, the average unit sizes range from 89sqm for Wendover's comparison units to 655sqm for Aylesbury's convenience units

5.7 Across the centres, the average unit is 212sqm, with the convenience units 464sqm and the comparison units 210sqm on average.

5.8 The relevance of these existing average unit size comparisons when considering impact is the scale of proposals relative to existing centres and the individual type and size of units within them. When retail trade diversion is being assessed, the widely accepted approach is that 'like competes with like' and that the proximity of the proposal to a centre or centres will influence the level of diversion experienced. For example it would be reasonable to consider the impact of a proposal which would perform a potentially similar role, and thus potentially divert trade away from a centre giving rise to trading and consequential impacts.

5.9 Those consequential impacts could include reduced footfall within a centre and a lower propensity for linked trips/spending; impact upon continuing viability of retailing in centres; effect on vitality and viability; and the potential to attract investment into centres. It should also be recognised that impacts are cumulative and may gradually build up over a period of time.

6 RETAIL PROPOSALS

6.1 At a local level, Aylesbury Vale District Council has provided details of retail (A1) planning permissions over the last three years. In total there have been 66 planning applications to increase in retail floorspace (A1-A5). Of these 53 have been determined, meaning that 13 are currently still pending consideration.

6.2 An analysis of these applications by reference to their location either in centre or edge/out of centre show that around 60% of the applications proposed development in out of centre locations.

6.3 The largest applications submitted to the LPA over the last few years have been submitted by the supermarket operators. These include a proposed new Sainsbury's at Gatehouse Road, just outside Aylesbury town centre (which is a reworking of a larger resolution to approve) which extends to 7,591sqm. Elsewhere in the district there have been two proposals by Lidl for 2,468sqm in Buckingham and a 2,760 sqm store at Oakfield Road, Aylesbury, M&S Broadfields Retail Park (1,425sqm) and Aldi, Bicester Rd (1,250sqm) all of which are out of centre all of which are out of centre.

6.4 From a comparison perspective proposals have been smaller in scale. At Broadfields Retail Park 1,961 sqm was proposed as mezzanines in units 6 and 7 and there was an application for a change of use of use of 1,839sqm of office space to retail at Friars Square (which appears to form part of the Next unit).

6.5 The vast majority of applications for A1-A5 floorspace have been small in scale, with around 35% of proposals less than 100sqm and 75% less than 400sqm.

6.6 The overall average scale of the proposals which have come forwards recently equates to an average size of 518sqm. However if the out of centre proposals are considered in isolation, when the need to support a application with further retail information may be required, the average size of those proposals totals 771 sqm.

7 CONCLUSIONS AND RECOMMENDATIONS

7.1 The Vale of Aylesbury Local Plan will set out the overall vision, objectives and policies for the future development in Aylesbury District. As part of this, Draft Policy E5 relates to development outside of town centres and states that:

> *The council intends to set a local floor space threshold above which an impact assessment would be required to accompany proposals for main town centre uses outside town centres. The council will commission further retail evidence to determine appropriate local thresholds based on past planning applications of this nature.*

7.2 In order to consider the appropriateness of a local floorspace threshold, a number of inter related issues have been considered. In terms of the NPPF, the sequential approach to development should be required for all town centre uses that are not within an existing centre and not in accordance with an up to date local plan.

7.3 Overall the centres of Aylesbury, Buckingham, Fairfield Leys and Jansel Square appear to be relatively healthy. The local centres of Walton Court and Parton Road would require the most protection from potential out of centre retail developments given that there is an identified requirement to re-establish or improve their perception to fulfil their full potential.

7.4 As demonstrated in Section 5 the average size of the units within the centres is broadly similar for Buckingham and Wendover at 125sqm and 106sqm respectively. Aylesbury is over double these sizes at 266sqm, but this is not unexpected given that it is the largest centre in the district. When focusing on the convenience and comparison elements of the centres, the average unit sizes range from 89sqm for Wendover's comparison units to 655sqm for Aylesbury's convenience units

7.5 Across the centres, the average unit is 212sqm, with the convenience units 464sqm and the comparison units 210sqm on average.

7.6 The largest applications submitted to the LPA over the last few years have been submitted by the supermarket operators. These include a proposed new Sainsbury's at Gatehouse Road (7,591sqm), Lidl, Buckingham (2,468sqm), Lidl, Aylesbury (2,760sqm), M&S Broadfields Retail Park (1,425sqm) and Aldi, Bicester Rd (1,250sqm) all of which are out of centre.

7.7 From a comparison perspective proposals have been smaller in scale. At Broadfields Retail Park 1,961sqm was proposed as mezzanines in units 6 and 7 and there was an application for a change of use of use of 1,839sqm of office space to retail at Friars Square (which appears to form part of the Next unit).

7.8 The vast majority of applications for A1-A5 floorspace have been small in scale, with around 35% of proposals less than 100sqm and 75% less than 400sqm.

7.9 The overall average scale of the proposals which have come forwards recently equates to an average size of 518sqm. However if the out of centre proposals are considered in isolation, when the need to support a application with further retail information may be required, the average size of those proposals totals 717sqm.

7.10 Given the overall health of the centres identified in Aylesbury, it is still important for the Council to carefully consider retail proposals which come forward which are not within these existing centres and which could have an impact upon them, both on an individual and a cumulative basis.

7.11 The recommendation to the Council is that a local plan wide threshold be introduced which requires retail impact information to be provided on a proportionate basis. The local floorspace threshold should be set at 400sqm (gross).

7.12 This would equate to a size of unit (both comparison and convenience) larger than the average unit within all the largest centres (212sqm), slightly larger than the average size of the comparison units across the centres (210sqm), but smaller than the average convenience units within the centres (464sqm).

7.13 The proposal would also be slightly smaller than the average unit proposed over the last few years in out of centre locations (717sqm), but it should be noted that only 15% (or 6) proposals would have been required to provide supporting sequential and impact information over the last three years.

7.14 It should also be remembered that the PPG advocates that the level of sequential and impact information provided in support of any application is proportionate and considered in a locally appropriate way and it is recommended that the Council work pro-actively with any applicant when scoping and agreeing the level of supporting retail information required by the final version of Policy E5 or any other relevant retail proposal within the Vale of Aylesbury Local Plan.