# Aberystwyth Retail Planning Study

## Final Draft

## Prepared for
## Ceredigion Council

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March 2007

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# 1.0 Executive Summary

**Retail Expenditure in Aberystwyth**

1.1 CACI have assessed the resident-based expenditure available to the comparison, convenience and bulky goods market in Aberystwyth. There is currently £213.6m of expenditure available across these retail categories. An additional £27.8m of expenditure is available from tourists who visit Aberystwyth.

**Resident-Based Market Potential (2007 – 2016)**

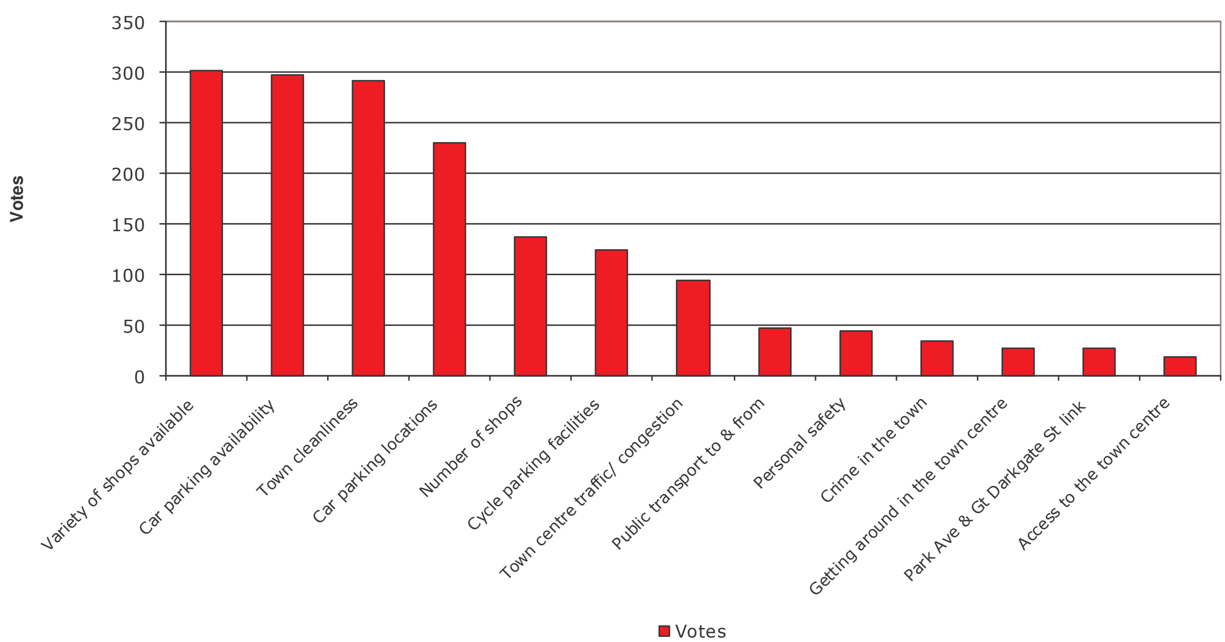
| Year | Comparison Goods Expenditure (£'s) | Convenience Goods Expenditure (£'s) | Bulky Goods Expenditure (£'s) | Total Expenditure (£'s) |
|---|---|---|---|---|
| 2007 | £93,887,812 | £90,409,637 | £29,305,839 | **£213,603,288** |
| 2012 | £122,710,946 | £92,492,088 | £32,713,216 | **£247,916,250** |
| 2016 | £169,133,098 | £95,933,877 | £34,731,867 | **£299,798,842** |

**Aberystwyth Town Centre Health Check**

1.2 Aberystwyth is located on the western coast of Wales. Due to its rural hinterland, the town's shopping population comes from a more compact localised area. With very little external competition for retailing, other than the out-of-town retail park at Parc-Y-Lyn, the town centre commands a very high market share of its 'captive' resident catchment population.

1.3 As a tourist destination, the town benefits from significant tourist related trade, which boosts the retail economy, in particular in the summer months. However, the tourist season also has an impact on residents, in particular parking becomes a greater problem in the summer months as the majority of tourists are car-borne.

**Ranked improvements that would benefit the economy of the town**



1.4 Aberystwyth is currently failing to meet the needs of its shoppers, a failing which is particularly pertinent for its 'captive' resident catchment population. This has serious implications on its currently vitality and viability as a good location to invest in retail property or to trade in. The lack of any strong retail anchors or retail clusters and large retail area has resulted in a diluted, illegible retail pitch, providing little true-prime pitch opportunities for retailers. The subsequent dilution of footfall means that Aberystwyth lacks the bustling feel that prime-pitches generate, and lacks a desirable rhythm between busy and quiet streets that residents and tourists alike would enjoy.

1.5 The lack of differentiation between retail areas causes a general lack of distinctiveness across the town centre, which could be improved by consolidating the core retail area and promoting other areas for non-comparison goods led purposes.

1.6 In terms of the trade mix in Aberystwyth town centre, there are large numbers of comparison and service units. This is indicative of Aberystwyth's role as a Main Town, which sells a range of comparison goods to a wide catchment population. Aberystwyth has a good provision of banks, estate agents, restaurants, pubs and other basic service infrastructure.

1.7 However, the retail mix within the comparison goods sector is not healthy, and needs significant improvement. In terms of vacant units, Aberystwyth only has 12 vacant stores, which suggests that despite its structural problems, trading conditions are still good – indicating a situation where the town is over-trading and therefore there is opportunity for new development and opportunity to reshape the retail pitch to create a more vibrant centre.

1.8 Aberystwyth's yields are average and have remained constant over the past 5 years. Therefore in investment terms, Aberystwyth is a good proposition.

1.9 More importantly however, is the opportunity for investors to increase the overall value of Aberystwyth's retail property market by working strategically to introduce a department store anchor, increase the range of variety/large format stores and improve the retail mix within the comparison goods sector.

1.10 Furthermore, there is opportunity to improve the infrastructure and environment of the town centre, in particular the availability and location of car parking and the cleanliness of the town centre.

1.11 All these actions will improve the attainment levels of retailers, which in turn will improve rents and therefore property value.

**Floorspace Requirements in Aberystwyth**

1.12 The town centre health check has revealed the need for more retail floorspace in Aberystwyth town centre to improve the retail mix, in particular to provide for a department store and more variety/large format stores.

1.13 CACI's analysis has revealed that Aberystwyth town centre's comparison floorspace uses are currently overtrading. Taking into account a dilution of trading densities, and expenditure growth, the following comparison retail floorspace need has been identified for Aberystwyth:

- 2007 3,594 sq m net
- 2012 7,555 sq m net
- 2016 8,228 sq m net

1.14 The implications of this strategy for development control, will be to fast-track major proposals for increases in floorspaces opportunities early on in the planning period, in accordance with CACI's Retail Action Plan.

1.15 Similarly, bulky goods floorspaces were found to be overtrading and therefore the recommended retail floorspace need for bulky goods is:

- 2007 1,387 sq m net
- 2012 1,938 sq m net
- 2016 1,938 sq m net

1.16 There is also evidence of overtrading across the convenience goods uses in and around Aberystwyth town centre. Recommended floorspace needs are much more sensitive to an acceptable level of overall trading densities than the timing of the floorspace – since forecast net growth in available expenditure is not substantial due to the impacts of the Internet.

1.17 Accordingly, the following range-based retail floorspace need has been identified for Aberystwyth:

- 2007 1,890 –3,947 sq m net
- 2012 2,003 –4,098 sq m net
- 2016 2,190 – 4,347 sq m net

1.18 These parameters of floorspace need will give the planning authorities the opportunity to caveat floorspace requirement based upon further impact studies of any particular application – to test the appropriateness of the location, and test how the development will compliment or compete with town centre uses.

**Preferred Site Selection Strategy**

1.19 The sequential test has been performed with reference to CACI's Retail Action Plan and floorspace requirements identified in previous chapter.

1.20 As a result, the following preferred retail/leisure land-use options have been identified for each site:

- Former Post Office Site: Comparison Retail (circa 3,750 sq m net)
- Garage Site: Tourism, Leisure, Catering &/or Convenience Retail
- Mill Street Site: Comparison Retail (circa 3,500 sq m net)
- Football Ground Site: Convenience Retail (circa 3,000 sq m net), Tourism, Leisure

1.21 The implications of these recommendations are:

- The former Post Office site and Mill Street site will together take circa 6,750 sq net of the strategic need for new comparison goods floorspace, which is 8,228 sq m net by 2016. This leaves a remaining headroom need of circa 1,500 sq m net. This headroom need can be satisfied over the period by store extensions and smaller retail proposals brought forward within mixed-use schemes.
- A supermarket on the Football Ground site of circa 3,000 sq m net, in CACI's opinion will not cause significant impact on existing trade. This will mean an additional need, on top of a supermarket on the Football Ground site of circa 1,300 sq m for smaller format convenience stores throughout Aberystwyth and in particular in Aberystwyth town centre (sites not explicity identified, but possibly including the Garage site).
- No particular site has been identified to satisfy the identified need for additional bulky goods floorspace. For this reason, it may be suggested that the satisfaction of this need can come from extensions of existing units and moderate development of existing bulky goods parks and gardening centres.

# 2.0 Introduction

**General aims of the Study**

2.1 Ceredigion County Council and WAG DEIN required a study that would complement and inform the Aberystwyth Masterplan which is currently being prepared for the town.

2.2 This study has the four following underlying objectives:

- To provide a comprehensive overview of the current shopping dynamics of Aberystwyth.
- To undertake quantitative and qualitative appraisal of existing retail provision relative to expenditure levels and latent potential.
- To assess Aberystwyth's capacity to absorb additional retail floorspace at both commercially and economically viable levels, and
- To help inform the preparation of Ceredigion County Council's Local Development Plan.

**Study Approach & Scope**

2.3 The key challenge to this study has been in drawing and presenting conclusions in a logical way that integrate the views of the commercial world, a world which CACI usually operates in, against the views of the planning system.

2.4 To achieve this, CACI have undertaken work with the planning system in mind, to ensure the conclusions of their analyses can be used for the council's Local Development Plan that will stand up to the scrutiny of the planning process.

2.5 However, a successful Masterplan needs more than defendable floorspace recommendations. It needs a creative, market-led solution to make the regeneration aspirations of a retail-led development strategy become a reality. It also needs analysis which retailers and developers understand, that may not necessarily sit well with the analysis needed to support planning applications and planning decisions.

2.6 For this reason, CACI have developed two strands to the study. One strand is a market-led and commercially aware retail strategy, developed from CACI's understanding of the shopping dynamics and retailer requirements. This is referred to as the Retail Action Plan for Aberystwyth.

2.7 The Retail Action Plan has assessed the relative suitability of different retail brands and made use of consumer analysis to help configure any optimal strategy for Aberystwyth.

2.8 This strategy can be communicated to the development industry and used as a document to engender positive action towards regenerating the town centre.

2.9 The second is a report fit for planning purposes (this report) which conforms with planning policies and makes reference to the Retail Action Plan where necessary, drawing the conclusions of this parallel work as a valid "qualitative" source.

2.10 The two strands of work interact closely together, and share the same evidence. While the planning report makes reference to the Retail Action Plan, the latter is also informed by the planning report in terms of:

- The recommendations for future retail floorspace needs,
- Current and Future Year estimates the Aberystwyth's town centre's available expenditure and
- Conclusions drawn in the Town Centre Health Check with regards the types of retail units required in Aberystwyth and investor interest in retail property in the town.
- Conclusions drawn in the Town Centre Health Check with regards to shopper's views of the town on what will make them spend more in the centre.

# 3.0 Town Centre Health Check: Retail Property

**Introduction**

3.1 A Town Centre Health Check has been undertaken for Aberystwyth town centre using an assessment of a number of key indicators in accordance with TAN 4 in conjunction with CACI's quantitative approach to understanding opportunities to re-optimise the retail mix in a town centre.

3.2 In this way we are able to use the Town Centre Health Check to assess the current quantitative need for changes in comparison retail space provision and to understand the health of the retail property market and future investment opportunities.

3.3 Following an assessment focused on retail property, the next chapter (4) continues the Town Centre Health Check by examining the infrastructure and environmental needs of the town centre. This section includes an analysis of the views of Aberystwyth's shoppers, based upon a shopper survey undertaken on the last two weekends of May 2007, which interviewed locals, people travelling into the centre to shop, people on business, workers and tourists – all of which were using the town centre for different purposes, but all contributing to the retail economy.

**Overview**

3.4 Aberystwyth is located on the western coast of Wales and is identified as being a 'Main Town' on the Proposal Map for the UDP. Due to its rural hinterland, the town's shopping population comes from a more compact localised area. With very little external competition for retailing, other than the out-of-town retail park at Parc-Y-Lyn, the town centre commands a very high market share of its 'captive' resident catchment population.

3.5 As a tourist destination, the town benefits from significant tourist related trade, which boosts the retail economy, in particular in the summer months. However, the tourist season also has an impact on residents, in particular parking becomes a greater problem in the summer months as the majority of tourists are car-borne.

3.6 The town centre is identified on the Ceredigion UDP Proposal Map and covers a relatively large area. The town centre is centred around Great Darkgate Street and extends to Marine Parade to the north, Castle Street to the west and Thespian Street to the east. It also extends to the south to include the Rhediol Retail Park. Primary and Secondary Shopping Frontages are also designated within the town centre, in particular, the main Primary Shopping Frontages are located on Great Darkgate Street, Terrace Road and Pier Street.

3.7 A photo of Aberystwyth town centre, taken on Pier Street looking towards the sea and the pier and a view of the coastline is shown in figure 3.1 and 3.2.

**Figure 3.1 Aberystwyth Town Centre**

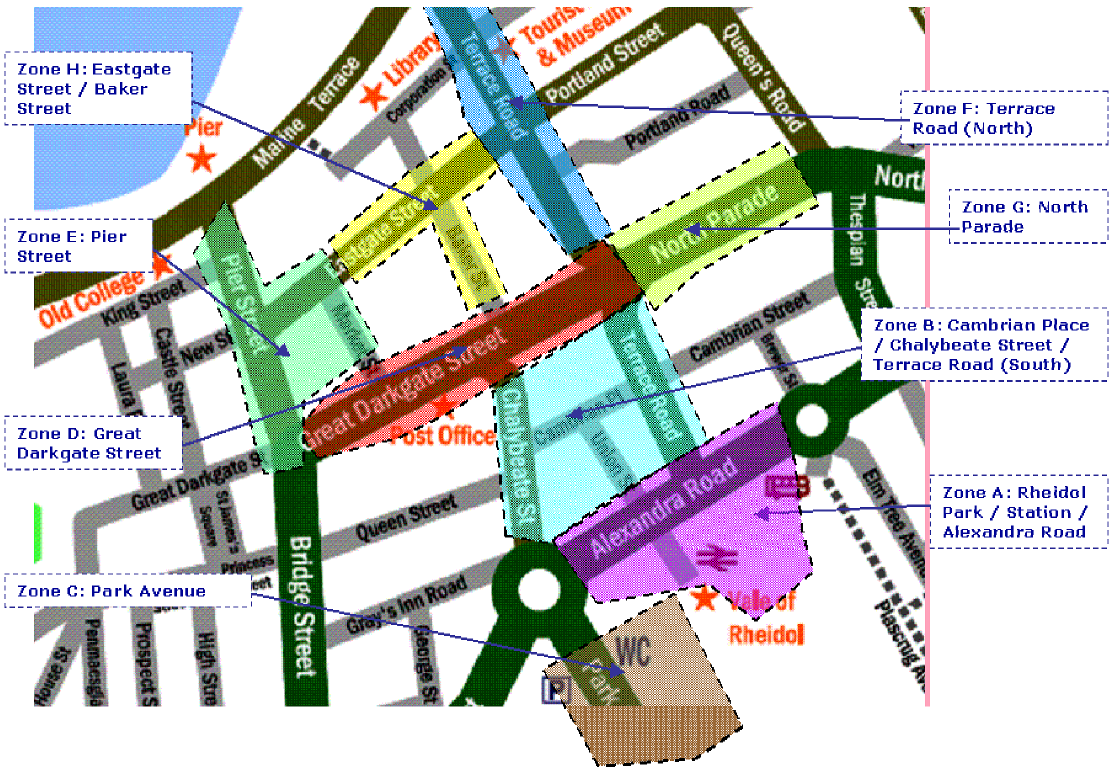

**Figure 3.2 Aberystwyth Coastline**

3.8 Figure 3.3 presents the shopping area for Aberystwyth. To assist with their analysis of the town centre, CACI have broken the area into zones. Shopping Frontage can be identified along Pier Street (Zone E), Great Darkgate Stree (Zone E) and Terrace Road North (Zone F). Smaller, independent units trade on Chalybeate Street and Terrace Road South (Zone B).

3.9 The Ystwyth Retail Park (Zone C) has recently been completed on Park Avenue, within the defined town centre. This comprises approximately 7,246 sq m (78,000 sq ft) of retail accommodation, including Matalan, Somerfield (who relocated from their existing store), Peacocks (who have also relocated), Brantano and Pets at Home.

3.10 Aberystwyth contains also the Rheidol Retail Park (Zone A) within the town centre, on the former station yard on Alexander Road. An out of centre Retail Park has also recently been built 1 km south east of the town centre at Parc-Y-llyn.

**Figure 3.3 Shopping Area for Aberystwyth**




**Source: Area Map and Mini Guide (www.aberystwyth.org.uk)**

### Floorspace and Trade Mix

3.11 CACI have assessed the trade mix for Aberystwyth and Figure 3.4 shows the results of this assessment. Figure 3.4 also shows the percentage number of independent and multiple stores in Aberystwyth.

**Figure 3.4 – Trade Mix in Aberystwyth Town Centre**

| Retail Mix | Mix (%) | Of which proportion Independent Traders (%) | Of which proportion Multiple Traders (%) |
|---|---|---|---|
| Clothing Retail | 18.9% | 62.0% | 38.0% |
| Non-Clothing Retail | 26.0% | 66.7% | 33.3% |
| Charity | 2.6% | 14.3% | 85.7% |
| **Comparison Sub-Total** | **47.5%** | **64.7%** | **35.3%** |
| Grocery/Convenience | 4.9% | 61.5% | 38.5% |
| Catering | 18.1% | 95.8% | 4.2% |
| Services | 25.3% | 47.8% | 52.2% |
| Vacant | 4.2% | n/a | n/a |

**Source: CACI analysis (2007)**

3.12 Figure 3.4 shows that Aberystwyth has a large number of comparison units. This is indicative of Aberystwyth's role as a Main Town, which sells a range of comparison goods to a wide catchment population. It is also noted that there is a relatively large number of service and catering units in the town centre, which indicates that Aberystwyth has a good provision of banks, estate agents, restaurants, pubs and other basic service infrastructure, and is also indicative of the tourist nature of the town.

3.13 Figure 3.5 below shows CACI's benchmarking information for comparison, catering and convenience retail stores in Aberystwyth. CACI have identified benchmark town by locating other remote UK towns with University campuses in the UK, with a reasonable fit to shopper demographics, preferably located on the coast with tourist appeal. In doing so, CACI have identified the most suitable set of comparable centres for Aberystwyth to help put Aberystwyth's retail mix into context and identify its particular strengths and weaknesses. The assessment focuses on active retail units occupied by commercial retailers and therefore it excludes vacant, charity and service units.

3.14 Further information on the benchmark process can be found in the Retail Action Plan.

3.15 The table shows that compared to other similar centres, in terms of comparison goods, Aberystwyth has a slightly above average number of clothing retailers and a slightly below average number of non-clothing retailers.

**Figure 3.5– Comparing Trading Mix with Benchmarks**

| Retail Mix | % No. Units Aberystwyth | % No. Units Benchmarks | Index |
|---|---|---|---|
| Clothing Retail | 36.0% | 34.2% | 105 |
| Non-Clothing Retail | 49.6% | 53.5% | 93 |
| **Comparison Sub-Total** | **85.6%** | **87.7%** | **98** |
| Grocery/Convenience | 5.0% | 5.4% | 93 |

| | | | |
|---|---|---|---|
| Catering | 9.4% | 6.8% | 137 |

**Source: CACI analysis (2007)**

3.16 Overall for the 'comparison goods' category there is a slightly below average number of comparison retailers. It also shows that the average number of grocery/ convenience stores is very similar to the benchmark. The number of catering units (coffee shops, fast food takeaway and restaurants) is above the benchmark, which is to be expected considering the tourist nature of the centre.

3.17 While the comparison goods retail mix of clothing and non-clothing retail appears to be in good balance, CACI have performed a more detailed breakdown of the retail mix by comparison goods retail sector (Figure 3.6) and compared it with the benchmarks.

**Figure 3.6 Comparing Comparison Retail Mix with Benchmarks**

| Retail Category[1] | Aberystwyth | Benchmark Centre Average | Index (Bmrk Centres = 100) |
|---|---|---|---|
| Womenswear | 11.4% | 22.5% | 51 |
| Menswear | 5.4% | 2.7% | 201 |
| Childrenswear | 1.4% | 1.3% | 112 |
| Mixed Clothing | 29.6% | 14.7% | 202 |
| Footwear | 6.8% | 11.1% | 61 |
| Jewellers | 2.2% | 2.2% | 100 |
| Fashion Accessories | 1.1% | 3.9% | 28 |
| **Clothing & Accessories Sub-Total** | **57.9%** | **58.3%** | **99** |
| **Health & Beauty** | **9.5%** | **9.0%** | **105** |
| Toys & Games | 1.7% | 2.6% | 66 |
| Music & Video | 1.5% | 0.8% | 173 |
| Computer Software & Accessories | 0.8% | 1.7% | 48 |
| Cards & Stationery | 6.1% | 8.1% | 75 |
| Sportswear & Equipment | 7.1% | 9.8% | 72 |
| Books | 5.3% | 2.6% | 206 |
| **Leisure Goods Sub-Total** | **22.5%** | **25.6%** | **88** |
| Electrical | 1.1% | 2.2% | 51 |
| Camera Shops | 1.1% | 0.4% | 259 |
| **Electrical Goods** | **2.2%** | **2.6%** | **85** |

[1] % of RCG Floorspace for Aberystwith, Multiple retail fascias only for benchmarks

3.18 This more detailed analysis has identified a current under-provision of Ladies Fashion retailers, Fashion Accessories, Footwear and Electrical Goods. Therefore, while attaining a broadly correct balance amongst land-use categories, the health of Aberyswyth's comparison retail mix is actually looking poor. Womenswear retailers are an essential ingredient to a successful retail destination, and without them shoppers will visit the centre less frequently, and spend less money when they are there.

**Vacant Units**

3.19 According to the CACI analysis, there are only 12 vacant units out of 292 units in the town centre. These vacant units are largely transitional and the level of vacant floorspace highlights the relative economic prosperity of Aberystwyth and thus, its strong vitality and viability. Due to the number of vacancies it should generally not be difficult for small scale independent retailers to move into Aberystwyth town centre although there are limited opportunities within the Shopping Area for multiple retailers seeking units with units with large floor plates. In any event, future retail growth and potential retail choice should not be limited in the short term.

**Multiple Retailers**

3.20 One measure of the relative success of a town centre is the number of multiple retailers present. A relatively large centre such as Aberystwyth has more pulling power than other settlements in the area and as such it has more chance of attracting multiple retailers. This is a result of many of the major operators determining location on the basis of greatest footfall.

3.21 Aberystwyth has a wide range of multiple retailers in the town centre. This represents the relative strength of Aberystwyth in relation to other centres within the County who struggle to attract multiple retailers. However, it is also the case that some multiples have moved away from the town centre, not through lack of profit, but because of the high servicing costs incurred because of the relative isolation of Aberystwyth.

3.22 This withstanding the Retail Action Plan has identified a lack of true-prime pitch in Aberystwyth town centre, due to the lack of any particularly strong retail anchor or retailer cluster in the town. This reduces the attractiveness of the town centre to multiple retailers, as without the benefit of a true-prime pitch they may favour out-of-town locations with more modern floorspace configurations and cheaper rents.

3.23 The multiple retailers located in the town centre include Woolworths, W H Smiths, Matalan, Boots, Waterstones, Dorothy Perkins and Burton to name a few.

3.24 Figure 3.4 assesses the level of multiple retailers in the town centre. It shows that the total number of multiple comparison stores is approximately one third of the total number of stores. It also indicates that the majority of grocery/convenience stores are independents, and almost all the catering units (coffee shops, takeaways and restaurants) are independents. The number of service units is approximately half the total number of units.

**Independent Retailers**

3.25 Although most town centre ranking systems are heavily weighted to reflect their position in relation to multiple retailers, in our view it is important for a successful town centre to have a good range of quality independent retailers. It is these retailers that create the unique character of a town centre and contribute to its continuing viability and vitality.

3.26 Aberystwyth has a large and diverse range of independent retailers that help to establish the character of the town centre. These retailers operate alongside recognised multiple retailers to create a vital and viable town centre. Figure 3.4 shows the percentage number of independent retailers compared to multiple retailers and demonstrates that on all counts except charity and service units there are much greater numbers of independent stores compared to multiple retailers.

3.27 This range and diversity of independent retailers within Aberystwyth should continue to be promoted, as it is these retailers which create the distinct character of the town. Furthermore, the Retail Action Plan has identified independent traders who are performing very well, and indeed outperforming multiple stores.

**Variety and Department Stores**

3.28 CACI have also compared the proportion of multiple retailers in Aberystwyth that operate as a variety or department store format with its benchmark centres. Figure 3.7 summarises the results of this analysis.

3.29 The analysis demonstrates that Aberystwyth is missing a department store. The lack of department store presents a real issue with respect to the health of retail in Aberystwyth. Without a department store anchor, the town has little focus, which is observable, as the town has no discernibly strong primary retail pitch, with retail spread across the shopping area. This subsequently causes problems with attracting retailers looking to trade under prime retail pitch conditions.

3.30 The 6.3% of multiple retailers in Aberystwyth are Variety Stores also compares unfavourably with the 13.5% of retailers at its benchmarks centres. Therefore, there is a need for more variety stores in Aberystwyth to improve the retail performance of the shopping area as a whole.

**Figure 3.7 Need for Variety and Department Store Formats**

| Large Store Formats | Aberystwyth | Benchmark Centre Average | Index (Bmrk Centres = 100) |
|---|---|---|---|
| Variety Stores | 6.3% | 13.5% | 46 |
| Departments Stores | 0.0% | 1.8% | 0 |

[1] % of Multiple retail fascias only

**Source: CACI analysis (2007)**

**Diversity of Uses**

3.31 A town centre's vitality and viability is dependent not only on its retail function but also on the mix of uses that contribute to the centre's attractiveness to those who live and work there. Leisure and entertainment facilities including cafes, bars and restaurants can add variety to a town centre and can also generate an evening economy.

3.32 As a Main Town in Ceredigion County, Aberystwyth town centre is a focus of activity and is able to offer a good diversity of non-retail uses that complement the retail function. There are adequate levels of banks, estate agents, restaurants, pubs and other basic service infrastructure in Aberystwyth.

**Yields**

3.33 TAN 4 advises that information on yields (when used in conjunction with other indicators) is a useful way of assessing the health of a town centre. Yields provide a measure of investor confidence in the long-term profitability of the centre, while rental levels reflect demand and to some extent the relative popularity of the centre with multiple retailers. Generally speaking, low yields indicate that a town is considered to be attractive by investors and as a result will be more likely to attract investment than a town with high yields. However, it must be noted that other factors such as town centre development can affect yields.

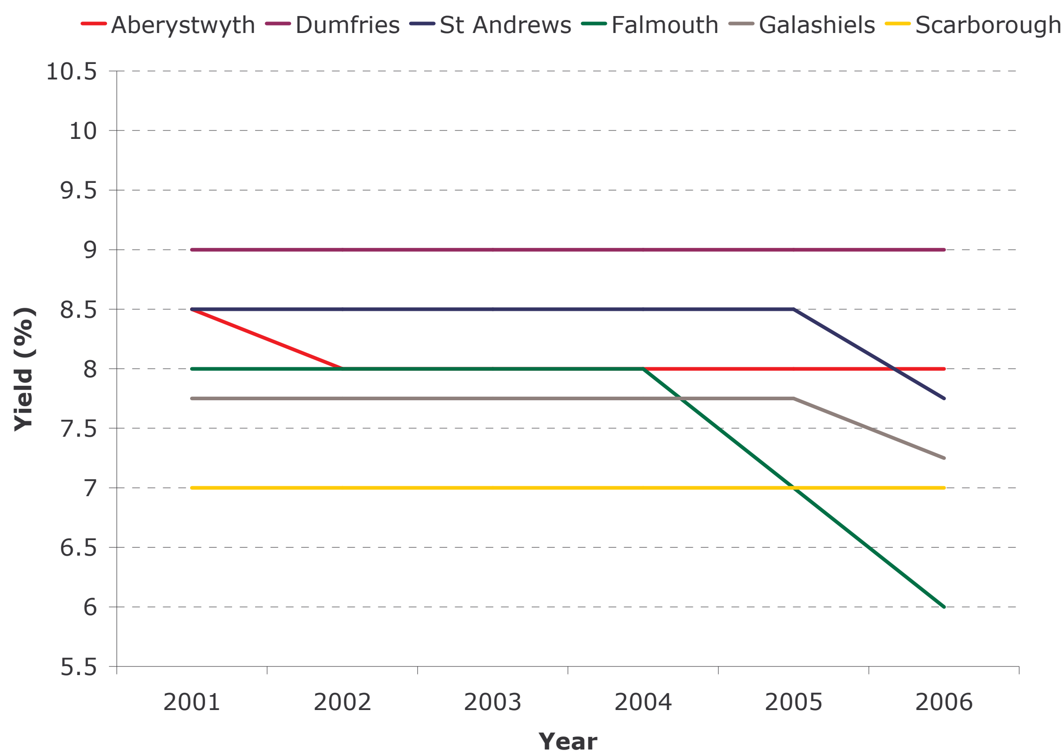
3.34 The yields quoted in this report have been taken from the Valuations Office's Property Market Report, July 2006. The yields quoted are "all risk yields" calculated by dividing the annual rent, as though it had been received as a single lump sum at the year end, by the capital value or sale price of the property.

3.35 These indicators need to be used with caution, particularly in the case of smaller centres where limited numbers of transactions may be involved. The level of yield on its own is of less value than in comparison with other yields at different points in time and in different locations. Yields measured consistently over time, as is the case within this report, can give an indication of the direction in which a particular town centre is moving.

3.36 Yield information is available for Aberystwyth and Figure 3.8 below demonstrates how shopping centre yields have varied over time in

Aberystwyth in comparison to other similar centres in Great Britain that CACI have identified as being remote towns with University campuses, of a similar size to Aberystwyth and located on the coast with tourist appeal (with the exception of Galashiels). Weymouth and Scarborough are least similar in terms of market size and demographic correlation to Aberystwyth, but both have strong tourist appeal and Scarborough is host to the University of Hull campus.

**Figure 3.8 – Shopping Centre Yields for Aberystwyth and Similar Centres**



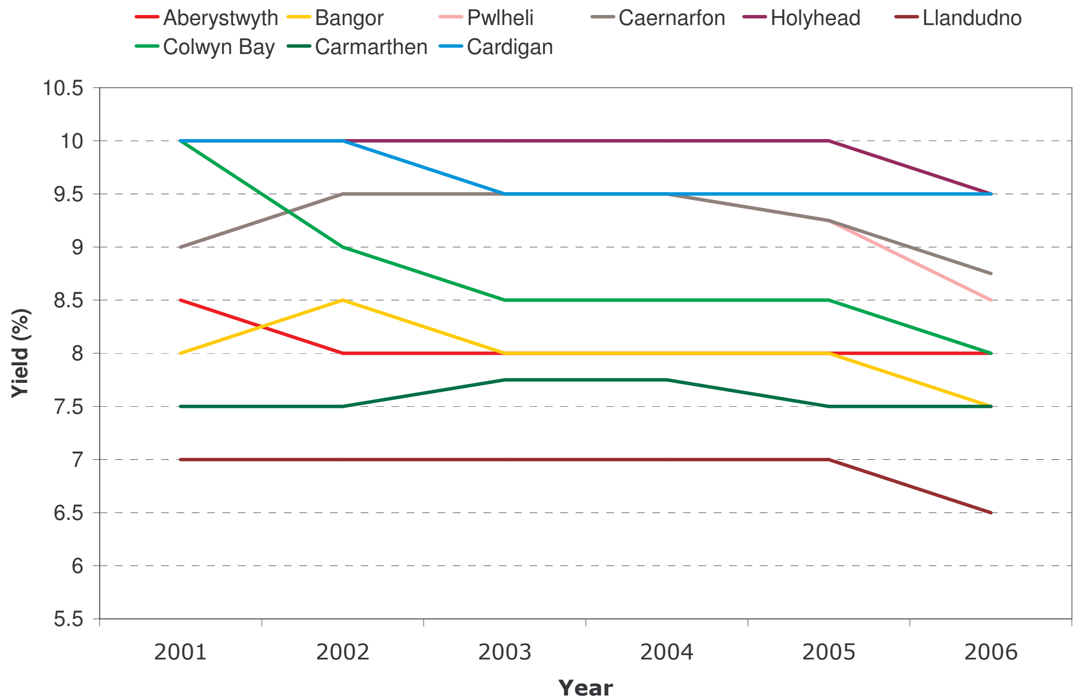

**Source: Valuation Office Property Market Report, July 2006**

3.37 Figure 3.8 demonstrates that yields in Aberystwyth have remained relatively constant and have only decreased slightly during the six year period from 2001 to 2006 from a high of 8.5 down to 8. This shows that investor confidence has remained consistently at a relatively high level.

3.38 The above chart also shows that the other centres considered in this study have relatively constant yields that are at a similar level to Aberystwyth.

3.39 Figure 3.9 below compares yields in Aberystwyth to other centres in Wales.

**Figure 3.9 – Shopping Centre Yields for Aberstwyth and Other Centres in Wales**




**Source: Valuation Office Property Market Report, July 2006**

3.40 The chart above shows that yields in each of the centres has remained relatively constant, however, some centres have decreased slightly towards the end of the period. The yields do not vary significant for each centre, however, it is noted that Aberystwyth has a relatively average yield when compared to other centres in Wales.

**Implications for Future Investment**

3.41 Aberystwyth's yields are average and have remained constant over the past 5 years. Therefore in investment terms, Aberystwyth is a good proposition.

3.42 More importantly however, is the opportunity for investors to increase the overall value Aberystwyth's retail property market by working strategically to introduce a department store anchor, increase the range of variety stores and improve the retail mix within the comparison goods sector. All these actions will improve the attainment levels of retailers, which in turn will improve rents and therefore property value.

# 4.0 Town Centre Health Check: Infrastructure and Environment

**Access by Foot and Bicycle**

4.1 The narrow one-way streets in Aberystwyth town centre restrict pedestrian and cycling access to and within the town centre. The number of vehicles using these streets further hinders this. As such, the walking and cycling provisions in the town centre are considered to be poor.

4.2 The Aberystwyth Masterplan recognises the need for additional and enhanced walking and cycling routes within and near the town centre. It advises, "Within the town centre one of the key requirements will be to improve pedestrian accessibility between the station area and the main part of the town centre" (pg. 40). Scott Wilson agrees with this analysis.

**Public Transport Services**

4.3 The central bus station in Aberystwyth is located to the south of the shopping area on Alexandra Road, therefore, it is within easy walking distance to the shopping area. A number of buses service Aberystwyth including Arriva bus numbers 501, 502 and 508. Bus number 501 runs every 20 minutes, while bus numbers 502 and 508 run every half hour. Also, the free 503 Park and Ride service links the car park on lower Park Avenue to the town centre every 15 minutes.

4.4 On Sundays and in the evenings, these routes are replaced by less frequent circular routes 514 and 515 linking the bus station, Waunfawr, Llanbadarn and Penparcau.

4.5 Aberystwyth is also connected by bus to other centres in Ceredigion County, Wales and other centres in the United Kingdom including Bangor, Manchester, Birmingham, London and Cardiff.

4.6 The railway station in Aberystwyth is also located within close proximity to the shopping area and links the traditional shopping area with the Ystwyth Retail Park. Trains from Aberystwyth run to Shrewsbury via Machynlleth every two hours and takes approximately two hours to reach Shrewsbury.

4.7 From Machynlleth trains run north towards Pwllheli to form the northern element of the Cambrian Coast Railway Line. A number of trains from Shrewsbury link this centre to a range of destinations in the United Kingdom.

4.8 In terms of local trains, as there is only one rail line to/from Aberystwyth, the only stops are those between this centre and Machynlleth, being Borth and Dovey Junction.

4.9 The Aberystwyth Masterplan advises that there are opportunities to enhance the railway and bus provisions in the centre. This includes improved integration of the railway station with bus services, the provision of bus shelters and bus boarders, and real time passenger information for rail and bus passengers. In addition, infrastructure requirements would include bus priority at junctions and the provision of bus lanes in areas where this is achievable. Rationalisation of Aberystwyth Town and Country Services to improve existing services and integrate with proposed changes to the highways network should be considered. Scott Wilson agrees with these findings.

**Car Access and Parking**

4.10 There are two main roads that provide access to run to Aberystwyth, being the A487 and A44. Due to the narrow streets within the town centre, congestion results as these roads are not suitable for modern travel levels.

4.11 The Aberystwyth Masterplan recognises that "few areas of the town are pedestrian friendly. There is a need to create an improved pedestrian environment through the removal of all non-essential traffic from selected streets. Restricted access to selected streets at certain times of the day may be appropriate for Cambrian Place, Union Street and Queen Street" (pg. 38). Scott Wilson agrees with this analysis.

4.12 Scott Wilson has performed a detailed analysis of parking in a separate report. As stated within this analysis, it is essential that the location and quantity of parking provision encourages linkages between the modern retail facilities and the historic town centre core.

**Attractiveness of the Town Centre**

4.13 Aberystwyth town centre is characterised by narrow streets and a number of historic buildings such as the Castle and Old College. It has a vibrant and diverse mix of local businesses, which add to the town's special character.

4.14 To the north of the town centre is the seafront, which contains a number of Victorian buildings, including residential development and the Town Hall. It is noted that a number of buildings are somewhat rundown and this detracts from the amenity of the area. It is considered that the buildings in this area should be protected and preserved.

4.15 The environment in the town centre is attractive and the standard of cleanliness of the town is high. There is little evidence of litter, fly posting or graffiti.

**Shopper Survey**

4.16 A survey was carried out in Aberystwyth town centre on the 24th – 26th May and 31st May to 2nd June 2007 with the purpose of gaining an understanding of the people visiting the town centre.

4.17 The time of the survey was chosen to capture both tourists and the student population. In total 715 respondents were questioned.

4.18 61% of these were female and 39% male, and 95% of those surveyed had been to Aberystwyth town centre before.

4.19 CACI have analysed the data in order to understand why people are in the town centre, where they are spending money, the improvements they would like to see made in the town centre and the key new retailers they would like to be trading in Aberystwyth. This has informed CACI's Retail Action Plan for Aberystwyth.

**Mode of Transport Used**

4.20 Just over 45% of locals and 30% of employees walk into the town centre. This statistic demonstrates the compact nature of Aberystwyth, and the importance of pedestrian links for the town centre.

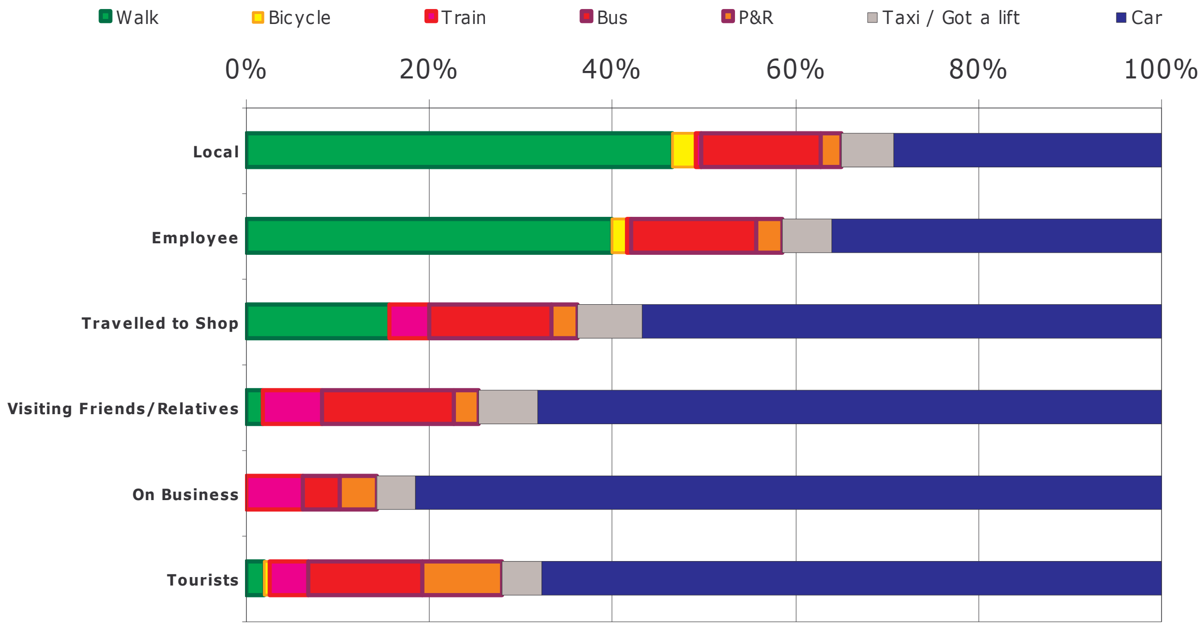
4.21 However, the vast majority of visitors are arriving by car. Just over 30% of locals visit the town centre by car and just over 60% of those travelling to the town to shop arrive by car.

4.22 Tourists and those on business are the most car-borne with 75% of tourists visiting the town by car.

4.23 Bus services also play an important role in the town centres economy approx. 13% of all resident based trade and 12% of tourists using these services.

4.24 Tourists most heavily use the Park & Ride, with 8.7% using the service against approx. 2.5% amongst the rest of visitor population.

**Figure 4.1 Mode of Transport Used to Access the Centre**



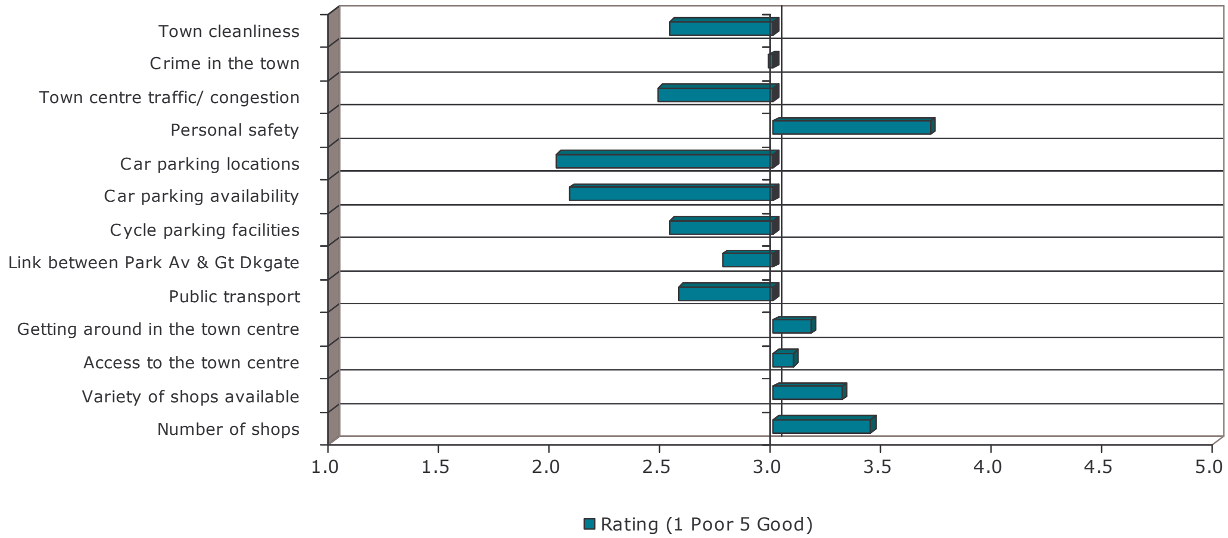

### Perceptions of the Town Centre

4.25 Survey respondents were asked to rate various aspects of town centre infrastructure and environment, as well as to rate the current retail provision.

4.26 Personal safety was ranked as the most positive perception of Aberystwyth, with car parking locations and car parking availability identified as the biggest problem with the town.

4.27 There were also concerns expressed towards the current cleanliness of the town centre and traffic problems, as well as dissatisfaction with public transport services and cycle parking facilities.

**Figure 4.2 Rating of Infrastructure, Environment and Retail**




**Improvements which would encourage more visits**

4.28 To help understand how to prioritise improvements to the infrastructure and environment for the town centre in order to assist with improvements to the economy of the town, respondents were asked what improvements would make a positive impact on how often they would visit the town centre.

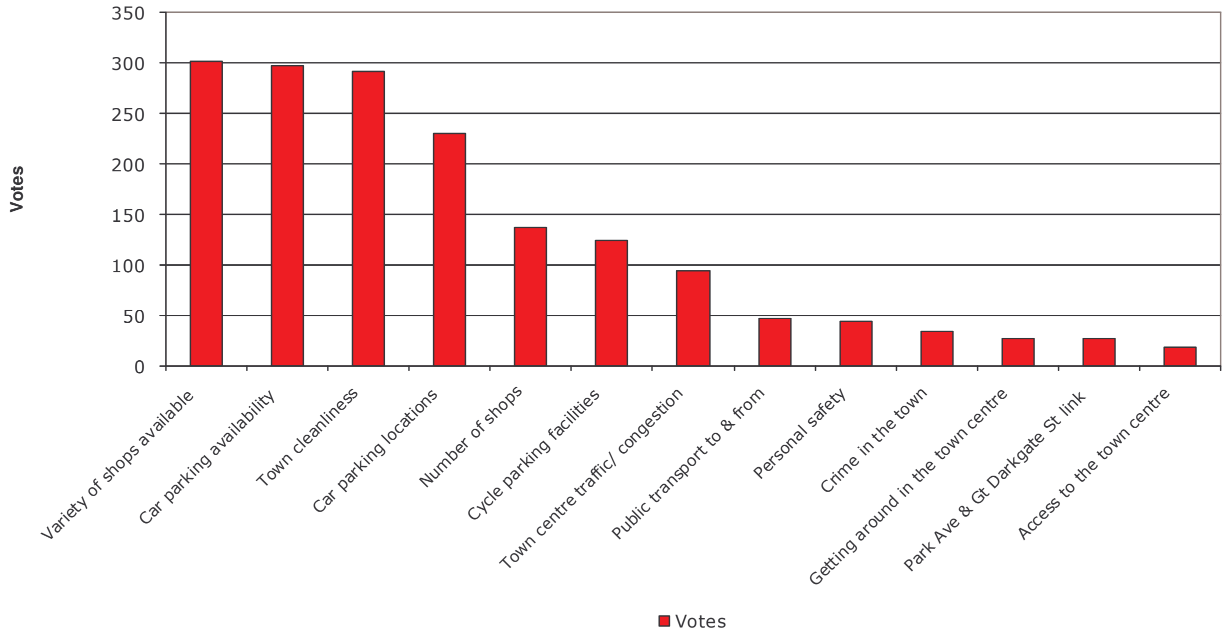
4.29 The variety of shops available and car parking availability gained the highest scores as improvements that could encourage more frequent visits.

4.30 The variety of shops is particularly significant as within Aberystwyth town centre there is not a large amount of empty units or spare land on which retailers can develop. Consequently, it is important that the land that is available is put to good use.

4.31 Both car parking availability and location have been identified as very decisive factors on persuading people to visit the centre more often. Therefore, it will be critical to address these issues as part of an overall strategy to improving the retail economy of the town.

4.32 Improvements to the cleanliness of the town are also high on the list of improvements that would attract more visitors to the town. This is not only important for the resident population but also for tourists, where the town centre is the town's "shop window". A poor impression of the high street environment can reduce spend attainment, as shoppers overall satisfaction of their shopping experience is reduced.

**Figure 4.3 Ranked improvements that would benefit the economy**




### Conclusion on Vitality and Viability

4.33 Aberystwyth is currently failing to meet the needs of its shoppers, a failing which is particularly pertinent for its 'captive' resident catchment population. This has serious implications on its currently vitality and viability as a good location to invest in retail property or to trade in. The lack of any strong retail anchors or retail clusters and large retail area has resulted in a diluted, illegible retail pitch, providing little true-prime pitch opportunities for retailers. The subsequent dilution of footfall means that Aberystwyth lacks the bustling feel that prime-pitches generate, and lacks a desirable rhythm between busy and quiet streets that residents and tourists alike would enjoy.

4.34 The lack of differentiation between retail areas causes a general lack of distinctiveness across the town centre, which could be improved by consolidating the core retail area and promoting other areas for non-comparison goods led purposes.

4.35 In terms of the trade mix in Aberystwyth town centre, there are large numbers of comparison and service units. This is indicative of Aberystwyth's role as a Main Town, which sells a range of comparison goods to a wide catchment population. Aberystwyth has a good provision of banks, estate agents, restaurants, pubs and other basic service infrastructure.

4.36 However, the retail mix within the comparison goods sector is not healthy, and needs significant improvement. In terms of vacant units, Aberystwyth only has 12 vacant stores, which suggests that despite its structural problems, trading conditions are still good – indicating a situation where the town is over-trading and therefore there is opportunity for new development and opportunity to reshape the retail pitch to create a more vibrant centre.

4.37 Finally, the vibrancy of the centre is currently suppressed by reduced footfall linked to poor provision and location of car parking facilities and unsatisfactory maintenance of the environment.

# 5.0 Comparison Goods Capacity Assessment

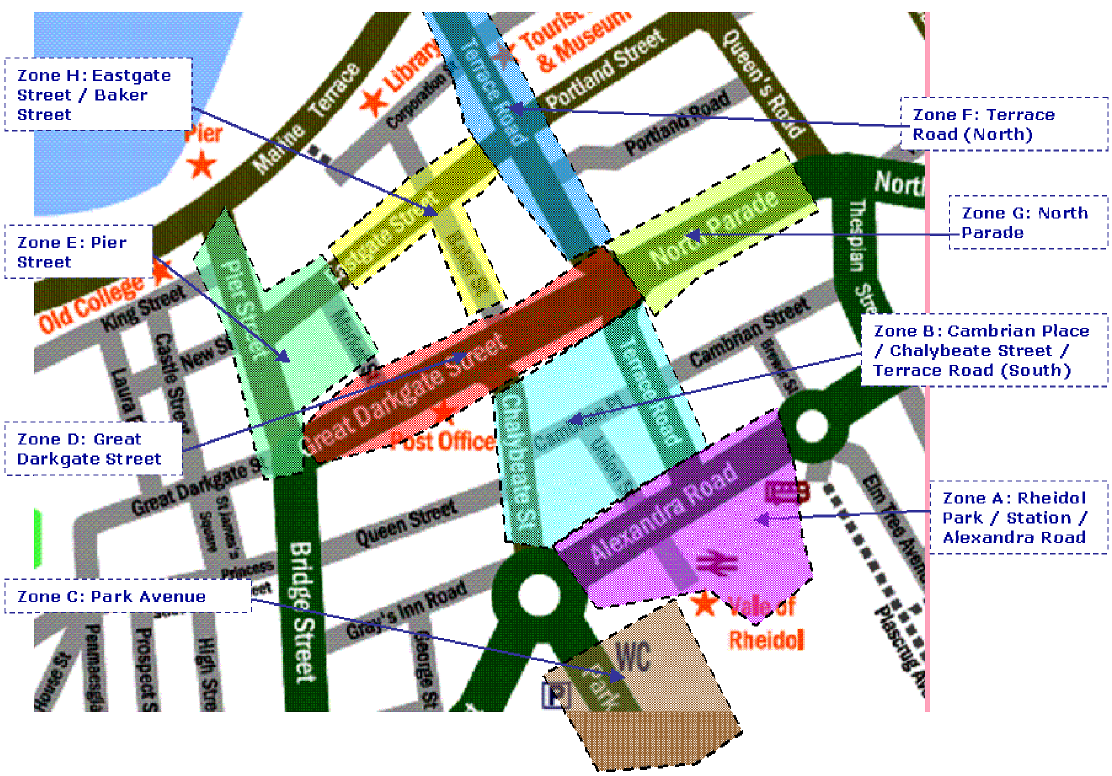
**Definition of Primary Shopping Area**

5.1 In order to perform a comparison goods capacity assessment, the Shopping Area of Aberystwyth has been defined, from which net trading floorspace of comparison goods has been audited. From site audit CACI have identified the Shopping area to constitute of eight zones within the town centre including:

- Zone A: Rheidol Park/Station/Alexandra Road
- Zone B: Cambrian Place/Chalybeate Street/Terrace Road (South)
- Zone C: Park Avenue
- Zone D: Great Darkgate Street
- Zone E: Pier Street
- Zone F: Terrace Road (North)
- Zone G: North Parade
- Zone H: Eastgate Street/Baker Street

5.2 These zones are mapped in figure 5.1 below:

**Figure 5.1 Shopping Area for Aberystwyth**




**Source: Area Map and Mini Guide (www.aberystwyth.org.uk)**

5.3 The definition of the Shopping Area includes the retail developments in Rheidol Park and Park Avenue.

5.4 Figure 5.2 provides a summary of current net retail floorspace within each zone.

**Figure 5.2 – Comparison Goods Floorspace (sqm net)**

| Zone / Retail Category | Clothing & Accessories | Health & Beauty | Leisure Goods | Household Goods | Electrical Goods | Total |
|---|---|---|---|---|---|---|
| A | 488 | 0 | 454 | 440 | 0 | **1,382** |
| B | 728 | 58 | 224 | 349 | 76 | **1,435** |
| C | 2,910 | 0 | 0 | 0 | 0 | **2,910** |
| D | 3,058 | 736 | 1,282 | 532 | 96 | **5,704** |
| E | 1,209 | 85 | 861 | 0 | 78 | **2,233** |
| F | 537 | 394 | 944 | 142 | 0 | **2,017** |
| G | 0 | 32 | 293 | 206 | 0 | **531** |
| H | 28 | 14 | 98 | 57 | 0 | **197** |
| **Total** | **8,958** | **1,321** | **4,155** | **1,726** | **250** | **16,410** |

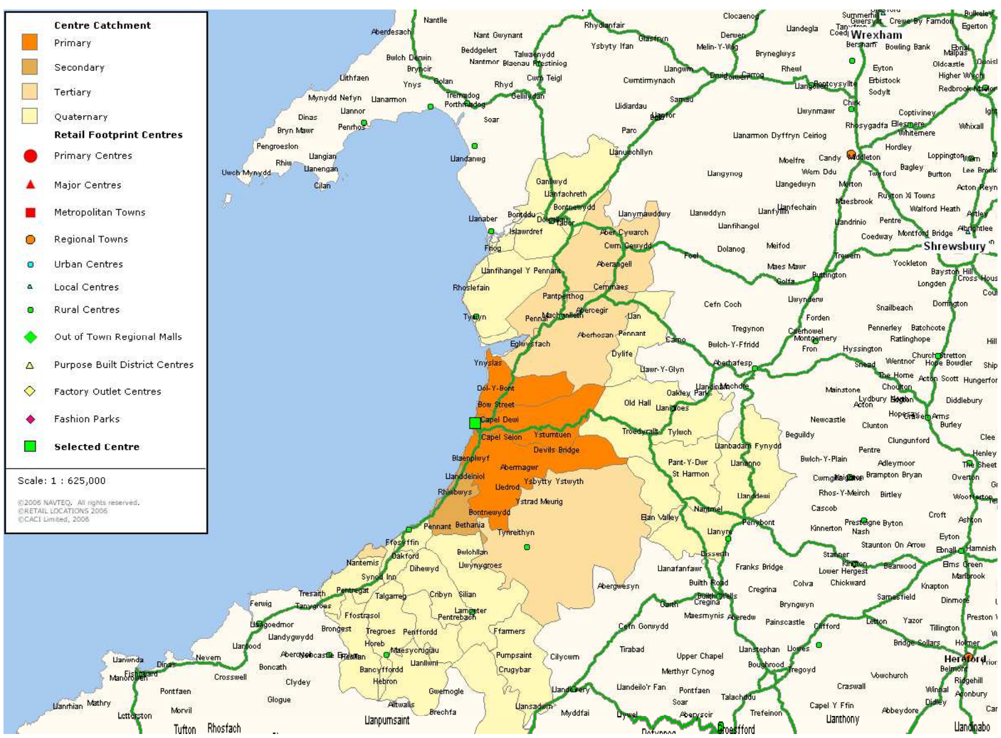
**Source: CACI Retail Audit (February 2007)**

5.5 Zone D, Great Darkgate Street takes the highest proportion of total comparison goods floorspace, with 5,704 sqm net trading space. Both zones G and H play a much less significant role in the overall retail pitch, with only 531 sqm and 197 sqm of net trading space respectively.

**Definition of Residential Catchment Area**

5.6 In order to perform a comparison goods capacity assessment, a catchment area need to be defined to assesses the level of comparison goods spend attributable to Aberystwyth. This has been defined by CACI using their Retail Footprint model (Figure 5.2).

**Figure 5.2 Catchment Area for Aberystwyth**




**Source: CACI Retail Footprint**

5.7 Figure 5.2 shows the modelled retail catchment for Aberystwyth broken down into four sub-catchment areas. The Primary Catchment area is defined by where the first 50% of Aberystwyth's shoppers come from. The Secondary Catchment is defined by where the next 25% of Aberystwyth's shoppers come from. Tertiary and Quaternary catchments are similarly defined, representing where the next 15% and final 10% of shoppers come from.

5.8 The combination of the Primary and Secondary catchments is referred to as the core catchment area. This area represents where a centre's core market is located. This is the area which the centre draws 75% of its turnover from, and moreover, is nearer by than the remaining Tertiary and Quaternary catchments.

5.9 By understanding the amount of comparison goods expenditure in each sub-catchment area of Aberystwyth's catchment and applying its market share of each area, an overall market potential for the centre, due to residential spend, has been derived of £93.9m (Figure 5.3).

**Figure 5.3 Aberystwyth Catchment Expenditure Statistics**

| Catchment | Total Population | Total Households | Total Comparison Goods Expenditure (£million) | Market Share of Expenditure (Aberystwyth) | Comparison Goods Market Potential (£million) | Origin of Aberystwyth's Residential Shoppers (%) |
|---|---|---|---|---|---|---|
| Primary | 32,900 | 12,877 | £74.5 | 93.9% | £70.0 | 50% |
| Secondary | 3,097 | 1,300 | £7.1 | 86.4% | £6.1 | 25% |
| Tertiary | 9,403 | 4,105 | £20.0 | 47.3% | £9.5 | 15% |
| Quaternary | 48,753 | 21,438 | £105.1 | 7.9% | £8.3 | 10% |
| **Total** | 94,153 | 39,720 | £206.8 | 45.4% | £93.9 | 100% |

**Growth in residential consumer spend**

5.10 The population in 2007 within the catchment area is 94,153. The growth in population has been projected by Scott Wilson using the same growth rates as those used by Ceredigion County Council in the STEAM Report (2005). Figure 5.4 below shows the growth in population between 2007 and 2016.

**Figure 5.4 – Population Growth**

| Year | Population |
|---|---|
| 2007 | 94,153 |
| 2012 | 98,029 |
| 2016 | 101,685 |

**Source: CACI and Ceredigion Population and Household Projections Review January 2002 (Amended October 2004)**

5.11 The amount of available expenditure for comparison goods has been assessed by CACI using their Retail Footprint model. The total amount of comparison goods expenditure within the catchment area is £206.8 million in 2007. This gives a per head figure of £2,196 for comparison goods spending in 2007.

5.12 CACI have determined that the Comparison Goods Market Potential in 2007 is £83.8 million from resident spend, which means that Aberystwyth has a market share of 45.4% of the total amount of comparison expenditure within the defined catchment area.

5.13 The 2007 baseline figure was projected forward to 2016 using population growth figures above and the expenditure growth rate for comparison goods derived from economic forecasts for Ceredigion from Cambridge

Econometrics. The growth rate for comparison goods is 5.8% p.a (2006 - 2015). Figure 5.5 shows the growth in comparison expenditure from 2007 to 2016.

**Figure 5.5 –Resident Comparison Market Potential (2007 – 2016)**

| Year | Comparison Goods Market Potential (£'s), Resident Spend |
|---|---|
| 2007 | £93,887,812 |
| 2012 | £122,710,946 |
| 2016 | £169,133,098 |

**Source: Cambridge Econometrics**

5.14 In order to estimate actual turnover in Aberystwyth, an adjustment to CACI's comparison goods expenditure figure must be made. This is to account for household expenditure that is not spent at the retail centres in CACI's retail footprint model. It includes sales made by home-delivery channels (such as catalogue and Internet), sales made at supermarkets, bulky goods and garden centre retail locations, which fall outside of retail footprint centres.

5.15 The adjustment has been made by compounding the following adjustments:

- An adjustment for comparison goods bought at retail locations, which fall outside of the retail footprint centre; and
- An adjustment for comparison goods bought using home-delivery channels.

5.16 The first adjustment is estimated by first dividing the comparison goods category into items that are predominantly bought at retail footprint centres and items that are not.

5.17 The following goods are considered to be predominantly bought at retail footprint centres: Clothing, Haberdashery and Accessories, Clothing Materials, Footwear, Luxury Goods, Small Household Electrical, Glassware, Tableware & Utensils, Household Textiles, Music & Video, Toys & Hobbies, Computer Games & Consoles, Sport Equipment, Books, Communications, Jewellery, Stationery & Cards, Personal Care Electrical Appliances, Sunglasses, Chemist Goods, Toiletries, Cosmetics & Perfume, and Cameras & Binoculars.

The following goods are considered to be predominantly bought outside retail footprint centres: Major Tools and Equipment, Garden Equipment, Plants and Flowers, Carpets, and Furniture and DIY goods.

5.18 Based upon this split CACI have recommended an adjustment of 71.2% to account for 28.8% of comparison goods expenditure spent at bulky goods and garden centre retail locations that fall outside of retail footprint centres.

5.19 The second adjustment has been based upon an industry expert view on the current and future market share of the home-deliveries channels for comparison goods. This includes reference to "The Home Delivery Sector in the UK 1995 to 2010" (October 2003). CACI have recommended an adjustment of 89.4% to account for 10.6% of comparison goods expenditure spent using catalogue and Internet home-delivery sales channels. This adjustment is changed to 85.4% and 79.4% to account for growth in the market share of this sector to 15.6% and 20.6% for 2012 and 2016 respectively.

5.20 The compound effect of these adjustments is to apply 63.7%, 60.8% and 56.5% to CACI's comparison goods market potential allocations to Aberystwyth for the years 2007, 2012 and 2016 respectively to arrive at an estimate of resident-based comparison turnover in Aberystwyth as shown in Table 5.6 below.

**Figure 5.6 –Resident-Based Comparison Turnover in Aberystwyth**

| Year | Comparison Goods Turnover (£'s), Resident Spend | Ratio between Turnover and Market Potential |
|---|---|---|
| 2007 | £59,762,221 | 63.7% |
| 2012 | £74,614,145 | 60.8% |
| 2016 | £95,615,676 | 56.5% |

**Source: Cambridge Econometrics + CACI/SW Analysis (2007)**

5.21 The figures in Figure 5.6 above do not take account of tourism spending. According to the Ceredigion County Council STEAM Report (2005), in 2005 tourists spent £27,800,000 on "shopping" within Ceredigion County. Scott Wilson have split this figure into 'comparison' and 'convenience' spending in a direct ratio with the amount of expenditure attributed to each of these goods types in 2007. Table 5.7 below shows the split in the amount of tourism expenditure.

**Figure 5.7 –Resident and Tourism Turnover in Aberystwyth (2007)**

| | Comparison Goods Turnover | Convenience Goods Turnover | Total |
|---|---|---|---|
| Residential | £59,762,221 | £49,149,374 | £108,911,595 |
| Tourism | **£15,254,480** | **£12,545,520** | **£27,800,000** |
| Total | £75,016,701 | £61,694,894 | £136,711,595 |

**Source: Scott Wilson analysis and Ceredigion County Council STEAM Report (2005)**

5.22 Figure 5.8 below shows the amount of available expenditure within the study area when accounting for tourism expenditure.

**Figure 5.8 – Total Comparison Goods Expenditure in Aberystwyth (2007-2016)**

| Year | Comparison Goods Turnover(£'s), Resident and Tourist Spend | Trading Density with Current Floorspace (16,410 sq m net) |
|---|---|---|
| 2007 | £75,016,701 | £4,571 |
| 2012 | £89,868,625 | £5,476 |
| 2016 | £110,870,156 | £6,756 |

**Source: CACI / Scott Wilson analysis (2007)**

5.23 CACI have calculated the amount of comparison floorspace (excluding the bulky goods categories) in Aberystwyth, which gives a total figure of 16,410 sq m net. This demonstrates that on average comparison goods premises within Aberystwyth are trading at £4,571 per sq m. Compared with an expected sustainable trading density of £3,750 per sq m (expert view of CACI) this analysis demonstrates a current over-trading in the town, which corresponds to the observed low vacancy rates and a high level of interest from retailers for space in Aberystwyth.

5.24 According to the projected growth in expenditure, the trading densities in 2012 and 2016 will have increased to £5,476 and £6,756. This would represent significant over-trading, and demonstrates a strong need for additional floorspace in Aberystwyth to cope with increased demand from retailers for more space in the town to take up the retailing opportunities created by forecast expenditure growth.

5.25 Scott Wilson have assessed the floorspace requirements for comparison goods in Aberystwyth for 2007, 2012 and 2016. These floorspace requirements were calculated based on two scenarios.

5.26 For 'Scenario 1' future comparison goods floorspace requirements were assessed assuming that Aberystwyth dilutes its current trading performance to maximise opportunity for new retail development to a trading density of £3,750 per sq m.

5.27 For 'Scenario 2' future comparison goods floorspace requirements were assessed assuming that Aberystwyth roughly maintains its current trading performance diluting it to a target benchmark trading density of £4,500 per sq m.

5.28 The following table shows the floorspace requirements for comparison goods in Aberystwyth for 'Scenario 1'.

**Figure 5.9 Scenario 1: Dilute Trading Density to £3750 per sqm**

| Year | Comparison Goods Turnover (£'s) | Target Trading Density (£'s per sq m net) | Floorspace Requirement (sq m net) | Current Floorspace (sq m net) | Additional Floorspace Requirement (sqm net) |
|---|---|---|---|---|---|
| **2007** | £75,016,701 | £3,750 | 20,004 | 16,410 | 3,594 |
| **2012** | £89,868,625 | £3,750 | 23,965 | 16,410 | 7,555 |
| **2016** | £110,870,156 | £3,750 | 29,565 | 16,410 | 13,155 |

**Source: CACI/Scott Wilson Analysis (2007)**

5.29 Figure 5.9 above demonstrates the comparison floorspace requirements for Aberystwyth if current trading performance was allowed to dilute to £3,750 per sqm. It shows that by 2012, 7,555 sq m net of additional comparison floorspace is required. By 2016 the amount of additional comparison floorspace required will increase to 13,155 sq m net.

5.30 The following table shows the floorspace requirements for comparison goods in Aberystwyth for 'Scenario 2'.

**Figure 5.10 Scenario 2: Dilute Trading Density to £4500 per sqm**

| Year | Comparison Goods Turnover (£'s) | Target Trading Density (£'s per sq m net) | Floorspace Requirement (sq m net) | Current Floorspace (sq m net) | Additional Floorspace Requirement (sqm net) |
|---|---|---|---|---|---|
| **2007** | £75,016,701 | £4,500 | 16,670 | 16,410 | 260 |
| **2012** | £89,868,625 | £4,500 | 19,971 | 16,410 | 3,561 |
| **2016** | £110,870,156 | £4,500 | 24,638 | 16,410 | 8,228 |

**Source: CACI/Scott Wilson Analysis (2007)**

5.31 Figure 5.10 above demonstrates the comparison floorspace requirements for Aberystwyth if current trading performance was allowed to dilute to £4,500 per sqm. It shows that by 2012, 3,561 sq m net of additional comparison floorspace is required. By 2016 the amount of additional comparison floorspace required will increase to 8,228 sq m net.

**Proposed Comparison Floorspace Development Strategy**

5.32 By considering the analyses from 'Scenario 1' and 'Scenario 2', a hybrid development scenario could be considered, whereby a dilution to £3,750 per sq m (net) would be acceptable throughout the planning period 2007-2012, whilst post 2012 trading densities should be allowed to increase back up to current levels, so that by 2016 the trading densities are at £4,500 per sq m (net).

5.33 This would represent an ideal economic situation where the retail development strategy for the planning period leaves the trading situation 2016 in a buoyant state, ready for possibly new development options for the subsequent Local Development Plan for 2017-2026.

5.34 Therefore, on this basis it would be recommended that a total of 8,228 sq m net would be a suitable level of new development to come forward between 2007 – 2016, but that it would be acceptable to bring this development forward earlier rather than later in the planning period, due to the ability for Aberystwyth to sustain lower trading densities than it is currently trading under.

5.35 Accordingly, the following retail floorspace need has been identified for Aberystwyth:

- 2007 3,594 sq m net (Scenario 1)
- 2012 7,555 sq m net (Scenario 1)
- 2016 8,228 sq m net (Scenario 2)

5.36 The implications of this strategy for development control, will be to fast-track major proposals for increases in floorspaces opportunities early on in the planning period, in accordance with the Retail Action Plan. In other words, applications early on in the planning period should be judged against their alignment with the Retail Action Plan.

# 6.0 BULKY GOODS CAPACITY

6.1 As stated in the comparison goods capacity analysis above, comparison goods have been assessed excluding 'Bulky Goods'. Assessing the value of bulky goods separately to general comparison goods is becoming increasingly significant because as the number of retail parks and out of town units has grown, so has the need to understand consumer behaviour when shoppers are purchasing destination based products such as DIY, furniture and white goods. There is a need to understand the way these retail parks are trading and how they have a bearing on trading in the town centre.

**Definition of Aberystwyth's Bulky Goods Retail Area**

6.2 The amount of bulky goods floorspace in Aberystwyth has been assessed by CACI audit work and Ceredigion County Council (Figure 6.1).

**Figure 6.1 – Bulky Goods Stores in Aberystwyth**

| Store | Location | Size (sq m net) |
|---|---|---|
| Bathstore | Rheidol Retail Park | 232 |
| Argos | Rheidol Retail Park | 513 |
| Pets at Home | Park Avenue | 372 |
| R Benjamin Furniture | Old Town | 111 |
| Classic Ceramics of Aberystwyth | Old Town | 149 |
| Geraint Furnishings | Old Town | 74 |
| Villa Hut Furniture | Old Town | 84 |
| Laura Ashley Home | Old Town | 196 |
| Magnet | Old Town | 149 |
| Knockout Furniture | Old Town | 147 |
| Walkers Electrical Goods | Old Town | 74 |
| Carpetright | Parc-Y-Lyn Retail Park | 743 |
| Halfords | Parc-Y-Lyn Retail Park | 563 |
| Richleys | Parc-Y-Lyn Retail Park | 595 |
| Focus | Parc-Y-Lyn Retail Park | 1,858 |
| Currys | Parc-Y-Lyn Retail Park | 743 |
| MFI | Parc-Y-Lyn Retail Park | 1,486 |
| Right Price Tiles | Parc-Y-Lyn Retail Park | 446 |
| Cardiganshire Farmers Country Store | Parc-Y-Lyn Retail Park | 446 |
| Broadleaf (timber products) | Glan yr Afon | 111 |
| **Total** | | **9,093** |

**Source: CACI audit and Ceredigion County Council**

6.3 Figure 6.1 above shows that the net amount of bulky goods floorspace in Aberystwyth is 9,093 sq m net.

6.4 The CACI definition of bulky goods includes the following:

- Bikes and large outdoor equipment
- Furniture
- Floor Coverings
- White Goods (Appliances)
- Tools
- Garden Tools

- Other DIY
- Brown Goods (TV, Video, Audio)
- Computers
- Paint and Wallpaper
- Textiles

6.5 For assessment of floorspace requirements for Bulky Goods, the same catchment area has been used as that defined in the comparison goods analysis.

6.6 Using Cambridge Econometrics spend estimates CACI estimated the spend per capita on bulky goods to be £686 per capita. Taking into account the 2007 population in the catchment area of 94,153 this translates a total amount of available bulky goods expenditure within the catchment area of £64,550,307 in 2007.

6.7 Using the same market share of 45.4% for comparison goods expenditure the amount of expenditure attributed to bulky goods in Aberystwyth is £29,305,839 in 2007 (Figure 6.2).

6.8 The 2007 baseline figure was projected forward using the expenditure growth rates for bulky goods of 1.4% p.a (2005 – 2016) derived from MapInfo Information Brief 06/2 (September 2006). Forecast growth for 2012 and 2016 is provided in Figure 6.2.

**Figure 6.2 Estimates of Bulky Goods Market Potential for Aberystwyth (2007 – 2016)**

| Year | Population | Expenditure per head | Total Bulky Goods Expenditure | Market Share | Bulky Goods Market Potential |
|---|---|---|---|---|---|
| 2007 | **94,153** | **£686** | **£64,550,307** | **45.4%** | **£29,305,839** |
| 2012 | **97,241** | **£741** | **£72,055,541** | **45.4%** | **£32,713,216** |
| 2016 | **101,685** | **£752** | **£76,501,910** | **45.4%** | **£34,731,867** |

**Source: Cambridge Econometrics + MapInfo Information Brief 06/02**

6.9 As for comparison goods capacity assessment (Chapter 5), we have applied some adjustment to take into account home delivery sales channels. We have used the same ratio's for these two factors, relating to a corresponding compound adjustment of 89.4%, 85.4% and 79.4% for 2007, 2012 and 2016 respectively.

6.10 These rations have been applied to CACI's bulky goods market potential allocations to Aberystwyth to arrive at an estimate of bulky goods expenditure in Aberystwyth as shown in figure 6.3 below. Tourism expenditure has not been attributed to bulky goods as tourists are unlikely to spend significantly on bulky goods when visiting Aberystwyth.

**Figure 6.3 – Resident Bulky Goods Expenditure (2007-2016)**

| Year | Bulky Goods Turnover (£'s), Resident Spend | Ratio Between Turnover and Market Potential | Trading Density at current level of bulky goods floorspace (9,093 sq m net) |
|---|---|---|---|
| 2007 | £26,199,420 | 89.40% | £2,881 |
| 2012 | £27,937,086 | 85.40% | £3,072 |
| 2016 | £27,577,103 | 79.40% | £3,033 |

**Source: Scott Wilson analysis (2007)**

6.11 The current estimate of £26.2m turnover at Aberystwyth's Bulky Goods in combination with the estimate of 9,093 sq m net bulky goods floorspace demonstrates that on average bulky goods premises within Aberystwyth are trading at £2,881 per sq m. Compared with an expected sustainable trading density of £2,500 per sq m (expert view of CACI) this analysis demonstrates a current over-trading in bulky goods stores, which corresponds to a high level of interest from bulky goods retailers for space in Aberystwyth.

6.12 According to the projected growth in expenditure, the trading densities in 2012 and 2016 will not significantly change (£3,072 and £3,033) due to impacts of the Internet counteracting expenditure growth in this sector.

6.13 Scott Wilson has assessed the floorspace requirements for bulky goods in Aberystwyth for 2007, 2012 and 2016.

6.14 Figure 6.4 below shows future bulky goods floorspace requirements assuming that trading densities are allowed to dilute to £2,500 per sq m.

**Figure 6.4 Floorspace Requirements based upon £2,500 per sqm**

| Year | Bulky Goods Turnover (£'s) | Target Trading Density (£'s per sq m net) | Floorspace Requirement (sq m net) | Current Floorspace (sq m net) | Additional Floorspace Requirement (sqm net) |
|---|---|---|---|---|---|
| **2007** | £26,199,420 | £2,500 | 10,480 | 9093 | 1,387 |
| **2012** | £27,937,086 | £2,500 | 11,175 | 9093 | 2,082 |
| **2016** | £27,577,103 | £2,500 | 11,031 | 9093 | 1,938 |

**Source: Scott Wilson analysis (2007)**

6.15 Figure 6.4 demonstrates that using the target trading density of £2,500 per sq m, there by 2012 there will be a floorspace requirement for 2,082 sq m net. However, due to the predicted impacts of the internet, this floorspace requirement will fall very marginally to 1,938 sq m net by 2016.

6.16 Accordingly, the recommended retail floorspace need for bulky goods is:

- 2007 1,387 sq m net
- 2012 1,938 sq m net
- 2016 1,938 sq m net

# 7.0 CONVENIENCE GOODS CAPACITY

**Definition of Aberystwyth's Convenience Goods Retail Area**

7.1 Floorspace figures for supermarkets and other convenience stores in Aberystwyth have been assessed by CACI. The following table summarises the size and location of the stores in Aberystwyth.

**Figure 7.1 –Convenience Stores in Aberystwyth**

| Grocery Store | Location | Size (sq m net) |
|---|---|---|
| Small Convenience Stores (inc Spar) | Old Town | 604 |
| Iceland and LIDL in Rheidol | Rheidol Retail Park | 1,208 |
| Co-op | Penpardau | 508 |
| Co-op | Penglais | 567 |
| SOMERFIELD | Park Avenue | 650 |
| KWIK SAVE | Park Avenue | 743 |
| MORRISONS | PARC Y LYN | 2,323 |
| **Total** | | **4,279** |

**Source: CACI analysis (2007)**

7.2 For assessment of floorspace requirements for Convenience Goods, the boundaries of Ceredigion County have been used. A different area boundary has been used from the comparison and bulky goods analysis since CACI's estimates of grocery performance were based upon a different model, Provision, which uses different catchment definitions to Retail Footprint. Ceredigion County boundaries were selected as a meaningful boundary with respect to estimating floorspace requirements for convenience stores within this area.

7.3 Using Cambridge Econometrics spend estimates CACI estimated the spend per capita on grocery goods to be £1,243 per capita.

7.4 Taking into account the council's estimates of the 2007 population in Ceredigion of 75,675 this translates a total amount of available convenience goods expenditure within the catchment area of £94,039,564 in 2007.

7.5 In terms of deductions for home delivery sales channels it has been assumed for this study that in the base year of 2007, 3.86% of all retail sales take place over home delivery sales channels for convenience goods. It is assumed that this figure of 3.86% increases by 1% per year throughout the study period. To this extent, whilst the percentage of convenience goods sold over home delivery sales channels will in all likelihood increase, it is likely that these goods will continue to be sourced from traditional supermarkets and will therefore require shelf space.

7.6 These adjusted convenience expenditure figures are shown in figure 7.2 and have been used to assess additional convenience floorspace requirements in Aberystwyth up to 2016. The effect of home delivery sales will need to be monitored over the Development Plan period as more research becomes available in order to plan for effects.

7.7 The 2007 baseline figures have been projected forward using expenditure growth rates derived from MapInfo Information Brief 06/2 (September 2006). The growth rate for convenience goods is 0.9% (2005 - 2016).

7.8 The growth in population has been projected by Scott Wilson using the same growth rates as those used by Ceredigion County Council in the STEAM Report (2005).

7.9 Figure 7.2 summarises the growth in population, convenience expenditure from 2007 to 2016.

**Figure 7.2 –Grocery Spend Estimates of residents in Ceredigion**

| Year | Population in Ceredigion | Available Grocery Spend | Deductions due to internet shopping channels | Available Grocery Spend for Store Visits |
|---|---|---|---|---|
| 2007 | 75,675 | £94,039,564 | -3.86% | £90,409,637 |
| 2012 | **78,790** | £101,483,528 | -8.86% | £92,492,088 |
| 2016 | **81,729** | £110,091,665 | -12.86% | £95,933,877 |

**Source: Cambridge Econometrics and Ceredigion Population and Household Projections Review January 2002 (Amended October 2004)**

7.10 To gain an understanding of the relationship between supply and demand between the residents of Ceredigion and the convenience stores in Aberystywth CACI have used their Provision model to estimate turnover at each store.

**Figure 7.3 –Performance of Convenience Stores in Aberystwyth**

| Grocery Store | Turnover (£millions) | Size (sq m net) | Trading Density (£'s per sq m net) |
|---|---|---|---|
| Small Convenience Stores (inc Spar) | £0.22 | 604 | £370 |
| Iceland and LIDL in Rheidol | £7.79 | 1,208 | £6,449 |
| Co-op (Penpardau) | £0.15 | 508 | £296 |
| Co-op (Penglais) | £0.29 | 567 | £514 |
| SOMERFIELD | £1.75 | 650 | £2,690 |
| KWIK SAVE | £2.13 | 743 | £2,868 |
| MORRISONS | £36.82 | 2,323 | £15,852 |
| **Total** | £49.15 | **4,279** | **£11,485** |

**Source: CACI analysis (2007)**

7.11 The model estimates that overall sales densities in Aberystwyth are £11,485 per sq m net, but that there are vast differences in trading densities depending upon the quality and size of store. Morrisons is trading at the highest densities (£15,852 per sq m net) whilst the Co-op in Penpardau is trading at the lowest (£307 per sq m net). The turnover estimates above also take into account the current estimated impact of internet/home delivery channels of 3.86%.

7.12 The overall resident-based estimate of turnover of £49.15 million means that Aberystwyth stores turnover 54.4% of the total spend available in Ceredigion County. This ratio has been applied to the spend estimates for Ceredigion County to provide future forecasts of resident-based turnover for Aberystwyth.

7.13 As noted in Chapter 5, the expenditure figures do not take account of tourism spending. According to the Ceredigion County Council STEAM Report (2005), in 2005 tourists spent £27,800,000 on "shopping" within Ceredigion County.

7.14 Figure 7.4 shows that the amount of tourism expenditure attributed to convenience goods is £12,545,520. Figure 6.4 below demonstrates expenditure for convenience goods when taking account of tourism expenditure.

**Figure 7.4 –Resident and Tourism Turnover in Aberystwyth (2007)**

| | Comparison Goods Turnover | Convenience Goods Turnover | Total |
|---|---|---|---|
| Residential | £59,762,221 | £49,149,374 | £108,911,595 |
| Tourism | **£15,254,480** | **£12,545,520** | **£27,800,000** |
| Total | £75,016,701 | £61,694,894 | £136,711,595 |

**Source: Scott Wilson analysis and Ceredigion County Council STEAM Report (2005)**

7.15 Figure 7.5 below shows summarises the total amount of available expenditure within the study area when accounting for tourism expenditure, and overall trading densities, based upon current floorspace (4,279 sq m net).

**Figure 7.5 – Total Convenience Goods Spend in Aberystwyth (2007-2016)**

| Year | Grocery Goods Turnover(£'s), Resident and Tourist Spend | Trading Density with Current Floorspace (4,279 sq m net) |
|---|---|---|
| 2007 | £61,694,894 | **£14,417** |
| 2012 | £62,826,976 | **£14,681** |
| 2016 | £64,698,035 | **£15,119** |

**Source: Scott Wilson analysis (2007)**

7.16 This demonstrates that on average convenience goods premises within Aberystwyth are currently trading at £14,417 per sq m. Compared to a trading density benchmark of £10,000 per sq m this demonstrates a current over-trading in the grocery goods store market.

7.17 Scott Wilson have assessed the floorspace requirements for convenience goods in Aberystwyth for 2007, 2012 and 2016. These floorspace requirements were calculated based on two scenarios.

7.18 For 'Scenario 1' future convenience goods floorspace requirements were assessed assuming that Aberystwyth dilutes its current trading performance to a trading density of £10,000 per sq m. This scenario represents a less sensitive development scenario with respect to potential impacts on other stores.

7.19 Figure 7.6 (Scenario 1) shows Aberystwyth trading at a diluted trading density of £10,000.

**Figure 7.6 Scenario 1: Dilute Trading Density to £10,000 per sqm**

| Year | Grocery Goods Turnover (£'s) | Target Trading Density (£'s per sq m net) | Floorspace Requirement (sq m net) | Current Floorspace (sq m net) | Additional Floorspace Requirement (sqm net) |
|---|---|---|---|---|---|
| **2007** | £61,694,894 | £10,000 | 6,169 | 4,279 | 1,890 |
| **2012** | £62,826,976 | £10,000 | 6,283 | 4,279 | 2,003 |
| **2016** | £64,698,035 | £10,000 | 6,470 | 4,279 | 2,190 |

7.20 Figure 6.6 above demonstrates that if current trading performance was allowed to dilute to £10,000 there would be an immediate need for additional floorspace of 1,890 sq m net. Between 2007 and 2012 this requirement does not significantly increase, due to the impacts of the

Internet counter-acting growth in consumer spend. By 2016 the amount of additional comparison floorspace required will increase to 2,190 sq m net.

7.21 For 'Scenario 2' future convenience goods floorspace requirements were assessed assuming that Aberystwyth dilutes its current trading performance to maximise opportunity for new retail development to a trading density of £7,500 per sq m. This scenario represents a much more sensitive development scenario with respect to potential impacts on other stores.

7.22 Figure 7.7 (Scenario 2) shows Aberystwyth trading at a diluted trading density of £7,500.

**Figure 7.7 Scenario 2: Dilute Trading Density to £7,500 per sqm**

| Year | Grocery Goods Turnover (£'s) | Target Trading Density (£'s per sq m net) | Floorspace Requirement (sq m net) | Current Floorspace (sq m net) | Additional Floorspace Requirement (sqm net) |
|---|---|---|---|---|---|
| **2007** | £61,694,894 | £7,500 | 8,226 | 4,279 | 3,947 |
| **2012** | £62,826,976 | £7,500 | 8,377 | 4,279 | 4,098 |
| **2016** | £64,698,035 | £7,500 | 8,626 | 4,279 | 4,347 |

7.23 Figure 6.6 above demonstrates that if current trading performance was allowed to dilute to £7,500 per sq m net there would be an immediate need for additional floorspace of 3,947 sq m net. Between 2007 and 2012 this requirement does not significantly increase, due to the impacts of the Internet counter-acting growth in consumer spend. By 2016 the amount of additional comparison floorspace required will increase to 4,347 sq m net.

**Proposed Convenience Floorspace Development Strategy**

7.24 The scenario's above have demonstrated a clear need for additional grocery floorspace in Aberystwyth, that will likely be delivered in the form of a range of new small convenience store formats as well as new supermarkets.

7.25 It will be important to ensure major applications for supermarkets do not absorb all the floorspace requirements for the planning period, at the expense of opportunities for smaller convenience stores, which will come forward on a more incremental basis.

7.26 At a target trading density of £7,500 the impacts on existing trade will be much greater, and therefore the appropriateness of any major application for new grocery floorspace will need to be further considered with respect the potential impact on other grocery stores and the town centre.

7.27 Recommended floorspace needs are much more sensitive to an acceptable level of overall trading densities than the timing of the floorspace – since forecast net growth in available expenditure is not substantial.

7.28 Accordingly, the following range-based retail floorspace need has been identified for Aberystwyth:

- 2007 1,890 –3,947 sq m net (Scenario 1)
- 2012 2,003 –4,098 sq m net or (Scenario 1-2, dependent upon impact tests)
- 2016 2,190 – 4,347 sq m net (Scenarios 1-2, dependent upon impact tests)

7.29 These parameters of floorspace need will give the planning authorities the opportunity to caveat floorspace requirement based upon further impact studies of any particular application – to test the appropriateness of the location, and test how the development will compliment or compete with town centre uses.

# 8.0 Aberystwyth Sequential Site Analysis

**Sequential Site Analysis**

8.1 In Chapters 5-7 of this report we assessed the quantitative need for comparison floorspace within Aberystwyth. Having identified capacity, we have assessed the suitability of four sites within Aberystwyth, including the former post office sorting site on Great Darkgate Street, a garage on Eastgate, a car parking area on Mill Street and the football ground site to accommodate this identified need.

8.2 While there are likely to be other further opportunities for redevelopment of existing buildings within Aberystwyth, these opportunities are difficult to identify with certainty.

8.3 However, it is important to take note that potential development on the four sites identified are not the only opportunities, and therefore do not necessary have to meet the need for new retail floorspace as identified in previous chapters.

8.4 In other words, consideration should also be made for ensuring there is headroom for smaller incremental development opportunities to take up a proportion of overall strategic need.

8.5 This analysis has been undertaken using a sequential approach having regard to both planning constraints, and commercial strengths and weaknesses of the identified sites.

**Former Post Office Sorting Site**

8.6 This site currently contains the former post office sorting building and has an area of 0.2ha (2,023 sq m).

8.7 The site fronts Great Darkgate Street to the north, Chalbeate Street to the east and Alexandra Road to the south. It includes no.'s 8 (the post office) and 12 Great Darkgate Street

8.8 Figure 8.1 shows the post office building and no. 12 Great Darkgate Street.

8.9 Figure 8.2 shows the entrance to the site on Chalybeate Street.

8.10 Figure 8.3 shows the service entrance on Alexandra Road.

**Figure 8.1: Former post office site**


**Figure 8.2: Entrance to the post office site on Chalybeate Street**

**Figure 8.3: Service entrance to the post office site on Alexandra Road**

8.11 The former post office site is located within the defined town centre boundary and its frontage to Great Darkgate Street is within the defined primary shopping frontage on the proposal map for the Ceredigion UDP Second Deposit Version (2002). Also, Chalybeate Street is designated as secondary shopping frontage.

8.12 The post office building was completed in 1901 and is an excellent example of Edwardian architecture. To the south of the site is the Ystwyth Retail Park and Rhediol Retail Park, which contains a number of retail stores including Argos, bathstore, Matalan, Lidl and Iceland. The development of the post office site for comparison development provides an opportunity to link Great Darkgate Street to these Retail Parks as at present the Retail Parks appear to be somewhat detached from the town centre.

8.13 It is envisioned that the main pedestrian entry/exit points to a development on the site would be Great Darkgate Street and Chalbeate Street. However, alterations to the frontage of the post office building would require careful consideration due to the historic façade of the building. It is considered that providing a pedestrian entrance/exit point to the site within no. 12 Great Darkgate Street would have a significantly lesser impact and would mean that the front façade of the post office could be retained. Servicing to the site could take place using an entry/exit point on Alexandra Road.

8.14 Given the sites location within the defined primary shopping frontage in the town centre, it is considered to be the most sequentially preferable of all the sites.

8.15 This site provides an opportunity to link Great Darkgate Street to the Ystwyth and Rheidol Retail Parks and will encourage further retail development on Chalybeate Street. This will help to create a high quality continuous retail frontage increasing pedestrian linkages/permeability with the Retail Parks.

8.16 CACI have identified in their Retail Action Plan that the former post office site would be an ideal location for a department store and opportunities to redevelop retail units on Chalybeate Street. A department store in the circa of 3,750 sqm net would result in an increase in trading performance on Great Darkgate Street and provide a stronger reason for linked trips between the retail on Park Avenue and Great Darkgate Street. This shift in trading patterns would occur providing that the development was designed to increase pedestrian connectivity from Great Darkgate Street to Park Avenue via Chalybeate Street. It is essential that linkages are maximised between the historic town centre and Park Avenue. This requirement will become even more necessary if the Mill Street site comes forward for retail development. It is important that the retail area around Park Avenue complements the town centre and does not compete with it.

8.17 We would recommend that the former post office site should be implemented first as it is the most sequentially preferable, however, we recognise that land-assembly issues need to be further explored.

8.18 Scott Wilson strongly recommends that the council prepare a development brief for this site.

**Garage**

8.19 This site contains a working garage and is located on the northern side of Eastgate. Figure 8.4 shows the existing garage on the site.

**Figure 8.4: Garage**

8.20 The site is within the defined town centre on the proposal map for the Ceredigion UDP Second Deposit Version (2002). It is also within the Secondary Shopping Frontage. The Council should explore the availability of this site and whether it could potentially become available.

8.21 This site is sequentially preferable to the Mill Street and football club sites, however, the post office site is the most sequentially preferable as it is better related to the primary shopping frontage. The site is also not considered as strategic importance to CACI's Retail Strategy. Considering its location away from the primary shopping frontage, this site maybe more suitable for tourism, leisure, catering or convenience uses.

**Mill Street Car Park**

8.22 The Mill Street site has an area of approximately 1.6ha (16,000 sq m) and is located on the southern side of Mill Street and south-eastern side of Park Avenue. The site currently contains a large car parking area comprising 101 short stay and 155 long stay spaces.

8.23 Figure 8.5 shows the Mill Street site.

**Figure 8.5: Mill Street site**

8.24 This site is located within the defined town centre and is designated for Mixed Use on the Ceredigion UDP Second Deposit Version (2002). The northern corner of the site is also subject to a transport proposal.

8.25 The Mill Street site is the third least sequentially preferable site. If developed, pedestrian linkages/ permeability on Park Avenue roundabout would need to be increased. Any development must complement the town centre and not compete with it.

8.26 CACI have identified in their Retail Action Plan the opportunity for a variety store and modern large clothing & footwear retail units on the Mill Street site, compromising of circa 3,500 sq m net. However, the retail strategy highlights this opportunity in conjunction with development of a department store at the former post office site and refurbishment and combining of retail units along Chalybeate Street. However, it is noted that if development at the Mill Street site was brought forward in isolation of this overall strategy, there is a risk that in combination with the other large retail units on Park Avenue that this area could potentially become a complete alternative to shopping within the historic town centre. It is therefore important that the linkages are maximised between the two areas and there is a clear advantage in bringing forward development on the former Post Office site as a priority.

8.27 In their Retail Action Plan CACI have highlighted the importance of location good parking facilities at this location to support both the commercial viability of retail development at Mill Street but to improve access to Great Darkgate Street via Chalybeate Street.

8.28 If the Mill Street Site came forward before the Great Darkgate Site then it is essential that pedestrian linkages are maximised between Great Darkgate Street and Park Avenue, particular attention should be focused on the Alexandra Road/Park Avenue Junction. It will be also critical to deliver new parking provision at this location, which in conjunction with pedestrian links to Chalybeate Street and the introduction of a department store anchor on the Post Office site will improve footfall into Great Darkgate Street.

**Football Ground site**

8.29 This site currently contains a football ground, bus station and car park. It is located on the south-eastern side of Park Avenue. The area of the site excluding the football ground is within the defined town centre and allocated for mixed-use development in the Ceredigion UDP Second Deposit Version (2002). The football ground is located adjacent to the defined town centre and is not allocated on the proposal map.

8.30 Figure 8.6 below shows the bus station, car parking area and football ground on the site.

**Figure 8.6: Football Ground site**

8.31 The site is the largest site considered in this analysis and has an area of approximately 4.8ha (48,000 sq m). Due to its size, this site will be an important opportunity site for employment and/or residential uses.

8.32 A comparison development on this site may compete with stores located in the town centre. In this respect, the site is not sequentially preferable.

Furthermore, the comparison retail floorspace needs identified in Chapter 5 comes to a maximum of 8,228 sqm net in 2016. The Retail Action Plan's preferred option for development of the Mill Street Site and Post Office Sorting Site would require almost the majority of this requirement (circa 6,750 sqm net).

8.33 To the west of the site is the River Rheidol. In Scott Wilson's view this site would be suitable for a mixed-use development involving hotel, tourist and leisure uses to take advantage of the sites location near the river.

8.34 In retail terms this site is the least sequentially preferable of the sites analysed. However, considering the need for additional convenience and bulky goods floorspace (chapters 6 and 7), and the need to prioritise opportunity sites closer to the town centre for comparison goods uses according to CACI's Retail Action Plan, there is a strong case for accommodating some of this retail need at this location.

8.35 While potentially competing with the town centre in some respects, a supermarket at this location has advantages in terms of its ability to compete against the existing Morrisons store at Parc-Y-Lyn – which is sequentially less preferable location for retail.

8.36 The convenience retail floorspace needs identified in chapter 7 comes to, subject to impact testing, up to 4,347 sq m net by 2016. With limited supply of any other sites to accommodate this substantial floorspace requirement, the Football Ground site becomes a very relevant location to satisfy this need, in the form of a supermarket. With respect to the maximum size of supermarket suitable for this particular site, two factors will need to be considered:

- The need to allocate a proportion the strategic need for convenience retail space for smaller convenience stores throughout Aberystwyth, and in particular to support the vitality of Aberystwyth town centre.
- The issue of controlling the sales of comparison goods at supermarkets – a retail category ruled out for this site.

8.37 It would be CACI's expert view that a supermarket of size circa 3,000 sq m net would leave sufficient headroom (circa 1,300 sq m net) for development of smaller convenience formats throughout Aberyswyth and ensure that the sale of comparison goods at the supermarket is self-regulated by ensuring the store is not over-spaced, leading to the supermarket having to concentrate its sales efforts on the sales of grocery goods.

8.38 The opportunities for Bulky Goods are less obvious on the Football Ground site, as this represents the least dense form of development, with expected trading densities at least a third of those potentially obtainable by supermarket uses. Therefore this land-use is unlikely to be the most preferable either in commercial terms or in planning terms, where higher development densities should be sought for this site, which according to the emerging Aberystwyth Masterplan, presents an opportunity to extend Aberystwyth town centre southwards.

**Strategic Conclusions**

8.39 The sequential test has been performed with reference to CACI's Retail Action Plan and floorspace requirements identified in previous chapter.

8.40 As a result, the following preferred retail/leisure land-use options have been identified for each site:

- Former Post Office Site: Comparison Retail (circa 3,750 sq m net)
- Garage Site: Tourism, Leisure, Catering &/or Convenience Retail
- Mill Street Site: Comparison Retail (circa 3,500 sq m net)
- Football Ground Site: Convenience Retail (circa 3,000 sq m net), Tourism, Leisure

8.41 On the Mill Street and Football Ground sites there maybe opportunities for additional land-uses, such as residential and/or hotel uses on top of retail on the Mill Street Site and residential and/or employment uses on the Football Ground site.

8.42 CACI have made indicative recommendations of a suitable level of comparison and convenience retail floorspaces on the former Post Office site, Mill Street Site and Football Ground site. The implications of these recommendations are:

- The former Post Office site and Mill Street site will together take circa 6,750 sq net of the strategic need for new comparison goods floorspace, which is 8,228 sq m net by 2016. This leaves a remaining headroom need of circa 1,500 sq m net. This headroom need can be satisfied over the period by store extensions and smaller retail proposals brought forward within mixed-use schemes.
- A supermarket on the Football Ground site of circa 3,000 sq m net, in CACI's opinion will not cause significant impact on existing trade. This will mean an additional need, on top of a supermarket on the Football Ground site of circa 1,300 sq m for smaller format convenience stores throughout Aberystwyth and in particular in Aberystwyth town centre (sites not explicity identified, but possibly including the Garage site).
- No particular site has been identified to satisfy the identified need for additional bulky goods floorspace. For this reason, it may be suggested that the satisfaction of this need can come from extensions of existing units and moderate development of existing bulky goods parks and gardening centres.