

WELSH GOVERNMENT CONSULTATION DOCUMENT
CALL FOR EVIDENCE AND PROJECTS
NATIONAL DEVELOPMENT FRAMEWORK

Submission of Evidence Form

Name

W A McKee
(CEO Accessible Retail)

Contact details

[REDACTED]

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Title of evidence

The Contribution of Retail Parks and Warehouses to the Goals of Prosperity and Equality set out in the Well-being of Future Generations Act

Summary of evidence

Prosperity: retail parks and warehouses account for some 30% of total retail spend and comprise the largest part of investment grade retail commercial property with a value in excess of £50 billion, making its commercial performance a key factor in the future financial security of millions of UK pensioners and holders of life policies. During the 2008 and beyond recession, the retail parks and warehouse sector was the most resilient part of the retail industry.

On a typical working day, the sector directly employs some 725,000 people in the UK, rising to around 800,000 for Christmas. This is more than the Big Four banks (597,000 worldwide) and much more than the pure play retail sector (on-line and multi-channel) which employs only 61,000 people.

Equality: these jobs comprise a wide range of employment types at all skill levels and, unlike many other sectors such as financial services, are available throughout the UK. Importantly for social mobility, apprenticeships and training schemes are available in roles such as hospitality, management, engineering and joinery, allowing people unable to complete higher education to work towards professional qualifications.

The New Retail Landscape: permanent structural change is taking

place in retailing in response to competition from multi-channel retailing and the fact that for many retailers town centre are now economically unviable locations. The result is a shift from secondary to primary centres and from small stores to larger stores.

Summary of key issues/conclusions

The Welsh economy operates in a competitive market place. Given this, achieving the Well-being Goals of prosperity and a more equal society will depend in part on the inclusion in the NDF of spatial policies which nurture and not restrict employment sectors which are economically successful and resilient and which offer employment opportunities to people from a wide social background.

Retail parks and warehouses make a substantive contribution to both these goals. Also, they provide the location, size, and configuration of floor space needed by retailers to respond to the structural change in retailing resulting from competition from multi-channel retailing and the high cost and unsuitability of town centre locations and sites.

Strategic retail policy in the NDF should recognise the above and ensure that investment can flow to the stronger centres whether, town centre, out of town or high street. No longer is a 'one size fits all' approach appropriate in the new multi-channel retail world.

Why have you submitted this evidence?

There is concern that, notwithstanding this strong evidence base, strategic spatial policies in the NDF will perpetuate the town centre first policy for retail development. A more balanced strategic spatial strategy is needed which recognises that future retailing provision now requires a multi-locational approach. This would help maintain the important contribution of retail parks and warehouses to economic growth and resilience and the provision of a wide range of employment opportunities and would complement policies to help town centres diversify and adjust to the new retail landscape.

How does this evidence and any actions it recommends help achieve the 7 well-being goals?

Wales already has a significant number of retail parks and it is not forecast that overall there will be a large volume of proposals for further parks in the next few years. However, existing parks will generate proposals for extensions, refurbishments and the widening

of consents. Also, there is a reasonable volume of first generation retail parks and warehouses which will require reworking. Finally, the proposed city regions around Cardiff and Swansea will have their own development plans and any proposals for new retail parks will need to be incorporated into their planning frameworks.

A balanced policy as promulgated above would provide confidence to investors, owners and occupiers to proceed with these proposals. This would secure the continuing of the contribution made by retail parks and warehouses to economic growth and resilience and to the provision of a variety of employment opportunities accessible to a wide range of people in Welsh communities.

Do you agree for your evidence to be made public?

Yes

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