

## Retail change in Cardiff

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### Introduction

Development of new 'decentralised' shopping facilities away from the traditional high streets has been an important feature of urban change in British cities. Decentralised shopping has had major effects upon shopping trip patterns and the health of the traditional high street. Explanations of retail growth and change tend, however, to be rather naïve, focussing in a general sense on population change and increasing car use. A fuller explanation should include both the behaviour of major retail developers and operators, and the extent to which local authorities have affected retail change through their town planning policies.

This case study reviews the development of large-scale retail stores in the suburbs of Cardiff (population c. 320,000) over the past 30 years. Some 13 large food stores and over 100 non-food stores have been built, creating new space larger than the whole of Cardiff city centre's retail area. This has happened despite town planning policies which have attempted to contain new development to sites within existing retail areas. The aim of the case study is to describe the main features of this retail decentralisation, and to explain briefly how the geographical pattern of development has been affected by planning policies.

### Findings

#### Large food stores

Four major retailers – Tesco, Asda, Sainsbury and Morrison – have built hundreds of large food stores or 'superstores' (defined as comprising at least 2,500 square meters of sales area) across the UK. These stores sell a full range of food and groceries, alcoholic drinks, and (increasingly) a large range of non-foods such as clothing and electronic goods; they have good access from major roads and large, free, car parks. In Cardiff, 13 such stores were opened between 1982 and 2009, including four Tesco and four Asda. All of these were built 'out-of-centre' (outside traditional retail locations), mainly close to junctions on the M4 and the peripheral Distributor Road (PDR) which almost encircles Cardiff. Thus they form a ring around the city, and most of them are not easily accessible to inner city dwellers without cars.

#### Retail warehouses

The 'retail warehouse' became a feature of UK retailing in the early 1980s, with companies such as B&Q, Comet and Allied Carpets rapidly expanding through building large 'big box' stores in locations away from traditional retail areas, at first frequently within industrial areas. These stores specialise in particular types of non-foods, such as do-it-yourself items,

electrical/electronic goods, or furniture, which require large display areas, sometimes with internal access for fork-lift trucks. More recently, clothing and fashion retailers such as Marks and Spencer, Next and T.K.Maxx have also developed retail warehouses.

In Cardiff, there are over 100 out-of-centre non-food stores. Some of these are old buildings converted to retail use, but most are purpose-built retail warehouses of at least 1,000sq.m. in sales area. Notable developments have been a large Marks and Spencer store on a 'greenfield' site at Culverhouse Cross on the western edge of the city, and a huge Ikea store built on formerly industrial/storage land close to the Grangetown area of inner Cardiff.

### **Retail warehouse parks**

Retail warehouse parks (or 'retail parks') are clusters of at least three retail warehouses, built by national or international property companies, and with good road access and free car parking. About half of Cardiff's retail warehouses are located in eight retail parks, mainly located near the PDR's junctions. Two of these are at Culverhouse Cross, close to the Marks and Spencer store and the largest Tesco in Cardiff. Two are on Newport Road, part of a 'retail strip' 1 km. in length which includes over 25 non-food stores. The largest however is the Capital Retail Park at Leckwith, built in conjunction with the new Cardiff City football stadium: this includes an Asda food store, Costco 'warehouse club', and over 15 other stores.

### **The influence of planning policies**

Planning policies at both national and local level aim to control out-of-centre retail development through a series of 'tests', in order to protect traditional city centre retail areas from excessive competition. However, the existence of over 120 out-of-centre stores, with a total area exceeding that of the city centre, suggests that planners have not been successful at controlling the rate of growth. Much of this development – particularly at Culverhouse Cross – was opposed by Cardiff Council planners, but gained planning permission from the Welsh Assembly Government following appeals by the developers. At times, the policies have seemed almost unworkable in the face of pressure from developers, but planners have been able to limit the impact of out-of-centre stores through compromises achieved with developers. Planners have also used retail development as a means to make land available for other uses such as offices or housing: a scarcity of sites means that retail development is often very profitable, and therefore the developer can be asked by City Council Planners to subsidise other loss-making developments

in return for planning permission for the developer's profitable retail development. For example, the Cardiff City stadium could not be built until the surrounding retail development was approved and a financial agreement made between the city council and the retail developer for the developer to subsidise the cost of the stadium in return for planning permission for the retail. And the Asda store and Cardiff Gate Retail Park at Pontprennau helped to finance a major expansion of the city's residential area in the 1990s.

Cardiff city council has been able partly to protect the city centre from negative trading impact by the out of centre retail parks through limiting the types of goods sold in retail parks. This is done through imposing 'conditions' on developers when planning consent is given which restrict what type of goods can be sold. As a result, there is only one large out-of-centre store specialising in clothing and fashions: Marks and Spencer at Culverhouse Cross, which opened in 1992 at a time when planning policy was less strict. Compare for example Swansea, where there is no such restriction and the many clothing stores in its retail parks have clearly affected the city centre. However, it is likely that Cardiff's out-of-centre shopping has taken substantial amounts of trade away from the city's smaller traditional 'district' and 'local' centres.

The recent developments at Leckwith and at the International Sports Village have exemplified the tension between the restrictive agenda of the city council's retail planners and the more relaxed attitudes of its 'special projects' team. Local politicians regard these schemes as essential to the city's future prosperity even though they violate the Council's planning policy.

### **Conclusions**

- Case-studies such as Cardiff can throw light on processes of retail growth and change.
- In the last 30 years, out-of-centre retail development in Cardiff has totalled over 100 new stores, which together exceed the total shopping area in the city centre.
- It is clear that Cardiff Council's policy of restricting out-of-centre development hasn't worked properly, but the Council have managed to limit its trading impact by restricting what goods can be sold.
- Recent events show that planning policy can be subordinated to other objectives if these are seen as more important by politicians.

### **References**

- Guy, C. (2010) 'Development pressure and retail planning: a study of 20-year change in Cardiff, UK', *The International Review of Retail, Distribution and Consumer Research*, 20: 1, 119 – 133
- Thomas, C., Bromley, R. and Tallon, A. (2006) 'New "High Streets" in the Suburbs? The growing competitive impact of evolving retail parks', *The International Review of Retail, Distribution and Consumer Research*, 16:1, 43 - 68

### **Further information**

- <http://www.planningresource.co.uk/article/1351614/shifting-centre-councils-changing-approach-retail-planning>