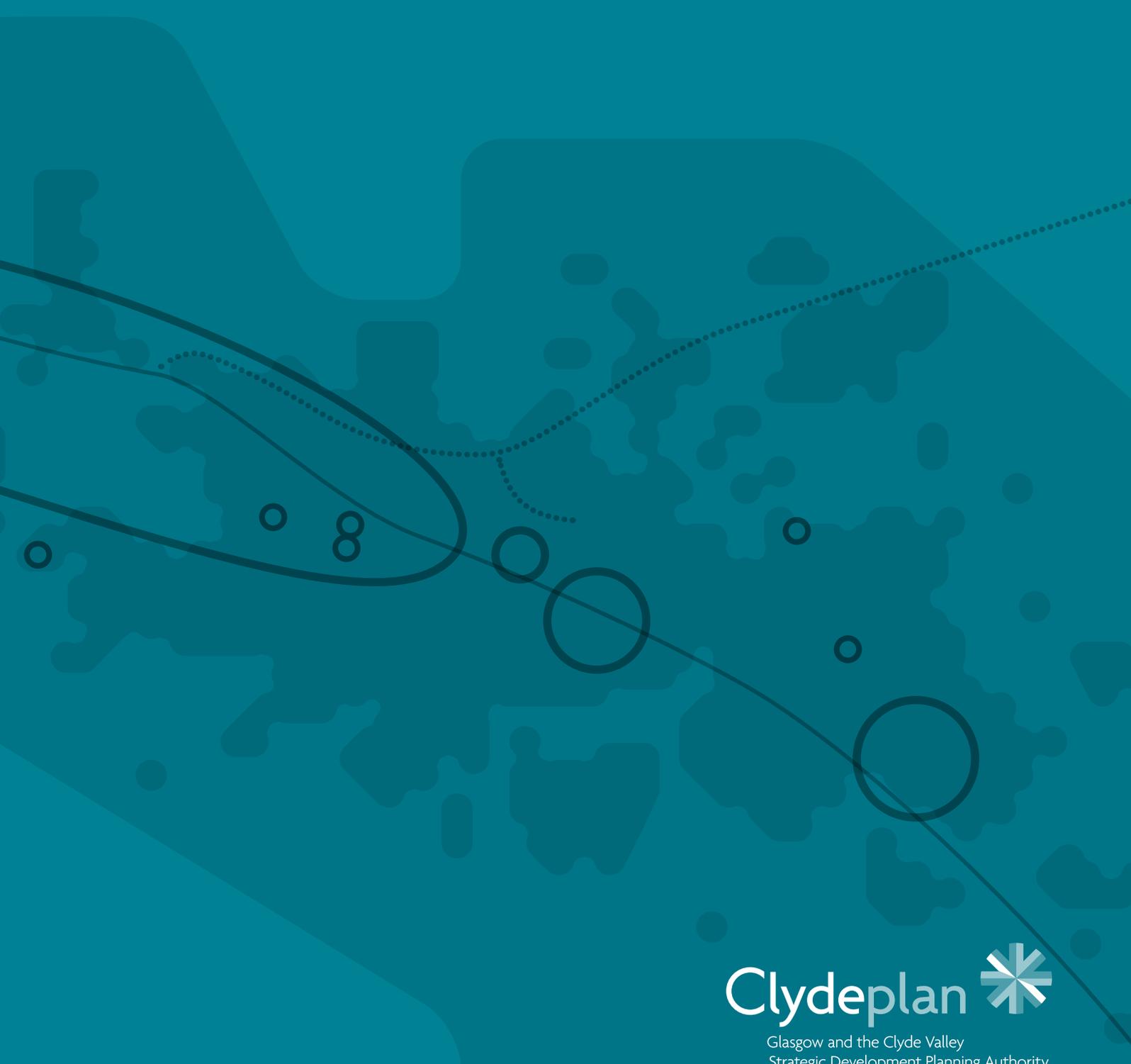
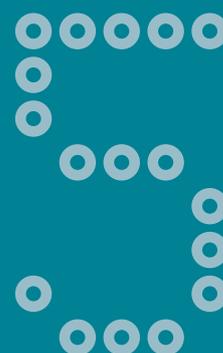


Strategic Development Plan

Proposed Plan - Background Report

January 2016

Network of Strategic Centres





STRATEGIC DEVELOPMENT PLAN

PROPOSED PLAN

BACKGROUND REPORT 5

Network of Strategic Centres

January 2016

Contents

1	Introduction	2
2	The Strategic Development Plan (SDP)	4
2.1	The SDP	4
3	Policy Overview	7
3.1	Policy context	7
4	National and city region economic context	8
4.1	Key trends and influences on our decision making process	8
4.2	Implications of the national and city region economic context for the network of strategic centres	8
5	Current and future trends that could impact on the Network of Strategic Centres	11
5.1	Current trends	11
5.2	Future Trends	11
5.3	Implications of the current and future trends for the network of strategic centres	12
6	Network of strategic centres' overview	15
6.1	Clydeplan Main Issues Report (MIR) – January 2015	16
6.2	Network of strategic centres – context	18
6.3	NSLSP 2012 Comparison shopping data analysis for the network of strategic centres	21
6.4	NSLSP (2012) Bulky goods data analysis	23
6.5	The complementary role of the network of strategic centres and the Strategic Economic Investment Locations	24
7	Clydeplan Network of Strategic Centres	26
8	Consultation, Review and Monitoring	37
Appendix A	Local Authority derived Strategic Centre data	39
Appendix B	National Survey of Local Shopping Patterns (2012) Comparison retail data analysis	51

List of Figures

- Figure 1: Proposed strategic levels of floor space in the strategic centres
Figure 2: GCV locations bulky goods rankings (NSLSP 2012)

1 Introduction

This Background Report, as part of the Strategic Development Plan (SDP) process, focuses upon the future of the network of strategic centres in the city region and sets out the policy approach to the network.

It focuses upon the network of strategic centres in terms of their strategic roles and functions. This report has been prepared in the context of an improving economic picture and a new focus in the Scottish Planning Policy (SPP) which is looking to promote a 'town centre first' approach to development and encourage a range of footfall generating uses in our centres. The role of comparison and bulky goods retailing is also considered in relation to the network of strategic centres.

A strategic centre may be of strategic significance in terms of roles and functions other than retail, and this is a fundamental principle of the approach taken in the recent SPP which identifies a town centre first principle that promotes a broader perspective to wider decision-making and considers the health and vibrancy of town centres. SPP states that planning for town centres should be flexible and proactive, enabling a wide range of uses which bring people into these centres. The planning system should apply a town centre first policy when planning for uses which attract significant numbers of people, including retail and commercial leisure, offices, community and cultural facilities. The network of strategic centres is based around the wider roles and functions of the centres, with some centres being less than strategic in retail terms, but of strategic importance in terms of their wider roles and functions, and the communities they serve. Strategic centres are the hub of our communities and the strategic centres of the future need to be vibrant centres for living, culture, entertainment, leisure, shopping, business and civic activity. These centres will need to constantly evolve to remain vibrant. So it is important to have a clear understanding of their primary functions within their strategic context.

The retail environment and the function of the strategic centres have evolved substantially over the last 30 years. In some cases, there has been a general drift away from the strategic centre and high street as the focus for food and non-food shopping, combined with the loss of many strategic centre civic and community functions. Significant in-town and out-of-town developments have combined to change consumer shopping patterns over the long term. The expansion of retail warehouse parks trading comparison goods and the significant non-food ranges sold by large out-of-town supermarkets have eroded strategic centre trade. More recently, the trend to remove bulky goods planning restrictions on first generation retail parks has resulted in yet more out-of-town comparison goods floorspace. These trends are accompanied with a similar shift in uses such as employment, leisure and public utilities, meaning strategic centres role and functions have changed and they all face a challenging future.

The challenges strategic centres face are structural not cyclical. Even if the economy recovers, as expected, this does not mean our centres will continue where they left off. These locations are going through a period of profound change but no single 'one size fits all' approach will provide a solution to each centre. Each centre has its own character and strengths and it is important that these are tapped into and realigned to meet the range of potential opportunities that the new planning policy and wider consumer trends create including, changing consumer habits, an ageing population, new technology, the development of e-commerce and the rise of the large scale aggregators (online operators and supermarkets) to provide an offer the community wants.

Within the network there are two inter-related trends. Firstly, the increased concentration of retail floor space around a central core of expanding centres. Secondly, some centres in the

network have been, and continue to be, impacted upon by these expanding centres and are experiencing a decline in their retail function. Despite these trends there is a resilience within the network as the strategic centres which are ranked between £50m and £250m in terms of their spend potential have shown growth by this measure between 2008 and 2012. These centres are a mix of traditional centres with more recent additions, such as Coatbridge, Greenock, Motherwell, Parkhead and Hamilton, and those based on more modern formats, such as at Clydebank, Easterhouse and Cumbernauld. This positive outlook is reinforced by large scale additions to their retail space at Pollok, Easterhouse and the City Centre and other centres are also seeking to expand and overall the network continues to remain attractive for users and investors alike.

This report is split into a number of sections:

- Section 2 – sets out the Strategic Development Plan (SDP) context
- Section 3 – outlines the policy context that the SDP and the network of strategic centres sits within.
- Section 4 - provides an overview of the potential impacts on our network of strategic centres', including, macroeconomics, expenditure patterns, wider retailing and commercial trends.
- Section 5 - sets out the key trends, current and future, that could impact on the network of strategic centres. These trends identify areas that are unfolding and altering in response to changing consumer and lifestyle trends and other market influences.
- Section 6 – outlines an overview of the network of strategic centres
- Section 7 – outlines the policy approach for the network of strategic centres
- Section 8 - outlines the consultation, review and monitoring options

2 The Strategic Development Plan (SDP)

This section sets out the SDP context and the role and function of the network of strategic centres in the wider spatial development strategy for the city region.

2.1 The SDP¹

The Scottish Government recognises the potential contribution city regions make to the sustainable economic growth of Scotland. SDPs are expected to be concise visionary documents. They should set out a vision for the long term development of the city regions and deal with cross boundary issues such as housing strategic infrastructure including transport, water supply and waste water and strategic green networks including green belts and set clear parameters for subsequent Local Development Plans.

SDPs are approved by Scottish Ministers and should be aligned with the policy context set out in both NPF3 and SPP. SDP's are required to be reviewed and resubmitted to Scottish Ministers within 4 years of their approval.

¹ www.clydeplan-sdpa.gov.uk/proposedplan2016

2036 Vision
The place we want to create:

By 2036 Glasgow and the Clyde Valley will be a resilient, sustainable compact city region attracting and retaining investment, improving the quality of life for people and reducing inequalities through the creation of a place which maximises its economic, social and environmental assets ensuring it fulfills its potential as Scotland's foremost city region.

The City Region in 2036

**Contributing to the
Scottish
Government's
Strategic
Objectives:**

Wealthier and Fairer

Smarter

Healthier

Safer and Stronger

Greener

Successful and Sustainable: The largest and most dynamic city region in Scotland for sustainable and inclusive economic growth and one of the UK's fastest growing city regions with a skilled and entrepreneurial workforce.

Low Carbon: Low carbon heat and power, waste management and green networks, contributing to ecologically sustainable economy and lifestyles.

Natural and Resilient: More sustainable and resilient communities and places, better able to meet unforeseen challenges.

Connected: Well connected to UK, European and global markets: digitally, by air, sea and surface transport.

Health and Wellbeing: Enterprising communities that support high levels of personal health and wellbeing and reduce economic and social inequality between people and places.

Collaborative: Working in partnership to deliver outcomes. Using spatial planning as a collaborative tool to stimulate and co-ordinate public and private sector investment in places.

Delivery and Outcomes focus for Planning and Placemaking

**Spatial Land
Use Model:**

Compact City
Region

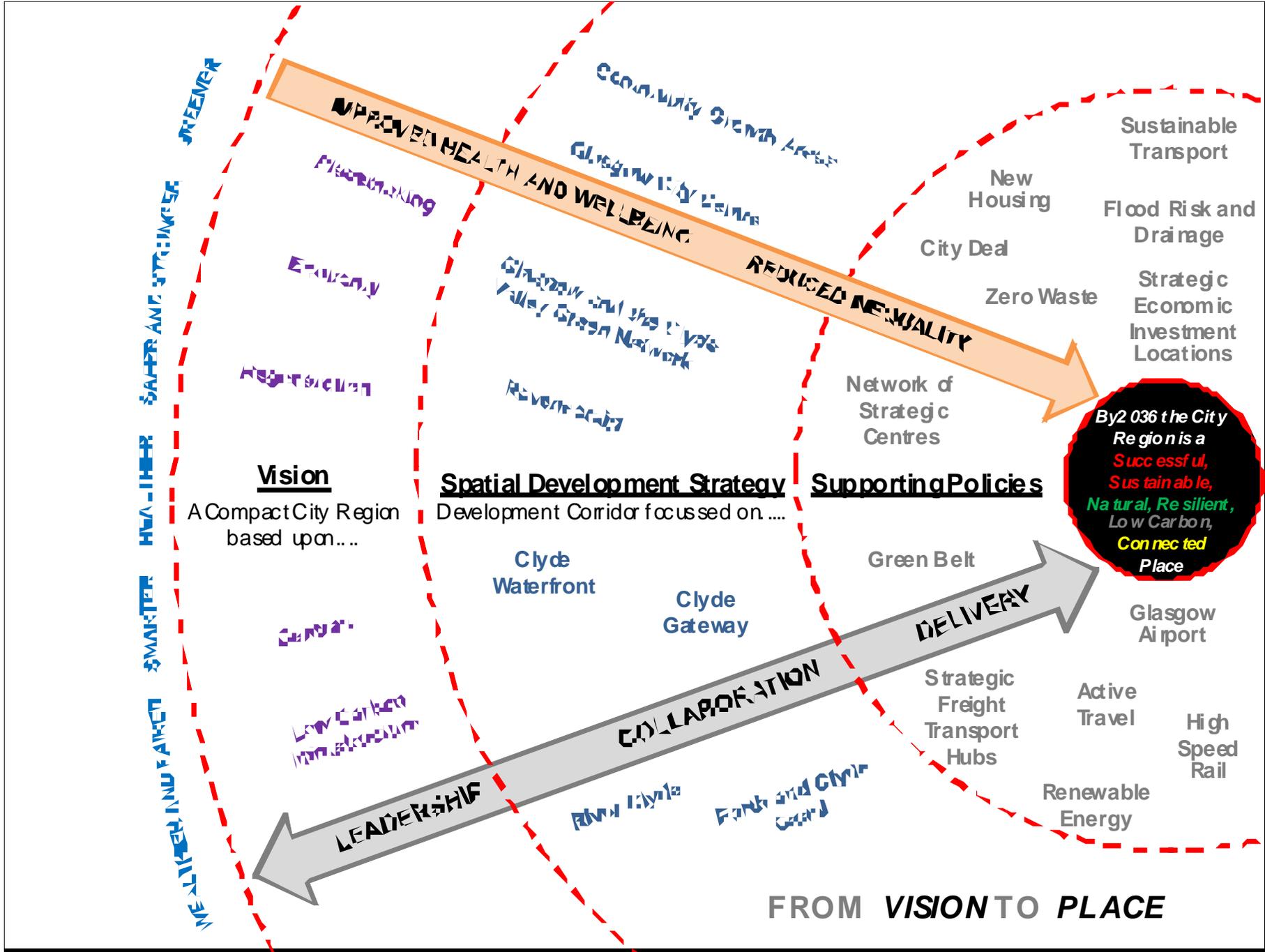
Centres: Glasgow City Centre will be the city region's central connected hub and the employment, retail, civic and cultural core of the city region. It will be accessible from across the city region and further afield particularly by connections to Glasgow International Airport and High Speed Rail connecting to London and other UK regions and centres. Support for other strategic centres to deliver their respective role and function.

Regeneration: Development prioritised to sustainable brownfield locations. Maximising the use of existing infrastructure and assets. Integrate land use with sustainable transport networks. Development prioritised on brownfield land. Minimal extension of the city region's built up area in support of sustainable economic growth. Urban fabric renewed to carbon neutral standards.

Economy: Support for key economic sectors and related Strategic Economic Investment Locations. Investment in freight hubs. Delivery of the Glasgow and Clyde Valley City Deal. Investment in digital infrastructure.

Low Carbon Infrastructure: Heat and power networks, network of waste management infrastructure, transport networks including active travel, green networks and sustainable drainage networks which contribute to a low carbon economy and lifestyles.

Placemaking: Creating places which are distinctive, safe, welcoming, adaptable, resource efficient and easy to move around. Communities reinvigorated by local activity. Places that support individual health and wellbeing and where green infrastructure connects urban and rural areas.



3 Policy Overview

This section outlines the policy context that the SDP and the network of strategic centres sit within.

3.1 Policy context

The SDP has to take into consideration the following elements:

- National Planning Framework 3²
- Scottish Planning Policy (SPP)³
- National Review of Town Centres⁴ and;
- Scottish Government's Town Centre Action Plan⁵

These policy drivers have helped inform the decision making process behind the identification the policy approach for the network of strategic centres identified in Section 7.

² <http://www.gov.scot/Resource/0045/00453683.pdf>

³ <http://www.gov.scot/Resource/0045/00453827.pdf>

⁴ <http://www.scotland.gov.uk/Resource/0042/00426972.pdf>

⁵ <http://www.scotland.gov.uk/Resource/0043/00437686.pdf>

4 National and city region economic context

The aim of this section is to outline the range of influences that impact on the network of strategic centres.

4.1 Key trends and influences on our decision making process

The trends that have influenced our decision making process are as follows:

- UK Economic perspective⁶
- Scottish economic perspective⁷
- City region economic perspective⁸
- Retail and Internet spending^{9,10,11}
- Commercial property overview¹²

4.2 Implications of the national and city region economic context for the network of strategic centres

These drivers above have helped inform the policy approach set out in Section 7 and their implications are reflected below.

Issue	Implications for Network of Strategic Centres
UK economic perspective	The Office for Budget Responsibility overview seems to suggest that the current growth we are seeing at a UK level is fragile and that a sustained recovery will be slow to take hold due to a degree of uncertainty in the robustness of the rise in growth despite some indicators improving. This uncertainty will have implications for not just consumers in the city region but also for businesses as they set out their business plans in the short to medium term. This will have implications for the city region's network of strategic centres in the short to medium terms as places for investment by non-public sector actors in the network. i.e. there may be limited market investment across the network of strategic centres in non-prime locations
Scottish economic perspective	The fact that the impact of the recession was felt less severely in Scotland and its recovery since does suggest some positive news for the country's economy. Like the previous UK projections, the overall picture seems to suggest that there is evidence of a recovery taken place; it is based on a range of fragile factors. This has clear implications for the network of strategic centres in terms of

⁶ <http://cdn.budgetresponsibility.independent.gov.uk/July-2015-EFO-234224.pdf>

⁷ <http://www.gov.scot/Topics/Economy/state-economy/latestSofE>

⁸ Please see Background Report 1 - www.clydeplan-sdpa.gov.uk/proposedplan2016

⁹ http://www.brc.org.uk/src_news_detail.asp?id=2850

¹⁰ <http://www.ryden.co.uk/sites/default/files/spr/Ryden%2077th%20Property%20Review%202015.pdf>

¹¹ http://reference.mapinfo.com/software/anysite/english_UK/9_1/Retail_Expenditure_Guide_2013-14.pdf - pp 15

¹² <http://www.ryden.co.uk/sites/default/files/spr/Ryden%2077th%20Property%20Review%202015.pdf>

	<p>consumer spend and investment opportunities, both public and private, in the network. i.e. there may be limited market investment across the network of strategic centres.</p>
City region economic perspective	<p>Given the changing face of retailing there are potential issues around vacant shop units across the network of strategic centres and their re-occupation. There is a potential need for promoting new uses for these vacant sites. The sector, whilst shrinking up to 2038, will remain a relatively important element of the city regions employment but one which increasingly reflects the constrained long term household expenditure picture. This means there may be fewer employment opportunities in the sector and these may be concentrated in the larger comparison retail centres in the network of strategic centres.</p>
Retail spending	<p><u>Total sales</u></p> <p>In July 2015, total Scottish sales decreased by 2.1% compared with July 2014, when they had decreased by 1.8%. Like-for-like sales decreased by 2.7% July 2014, when they had decreased by 3.7%.</p> <p><u>Convenience sector</u></p> <p>The grocery market remains challenging for retailers. Food price inflation remains low, and whilst the intense competition in the grocery sector brings benefits to consumers in terms of prices, it is a challenging environment for the firms involved.</p> <p>Total Food sales were 4.5% down on July 2014, when they had decreased 2.8%. This is the lowest year-on-year change on record.</p> <p>There has also been a shift towards other convenience sectors, including Lidl, Aldi and other operators such as Home Bargains since the recession. This has spatial implications for our network of strategic centres in terms of range of operators and store sizes. The key trends appear to be a move toward smaller – 4000sqm – sized stores alongside the ‘Metro’ type stores in more populated centres. Overall, the long term trends, at the UK level, of the convenience sector are that it will continue to grow but at a third of the rate of the comparison sector up to 2023.</p> <p><u>Comparison sector</u></p> <p>Non-Food sales increased by 1.6% over July 2014, when they had increased by 0.7%. This corresponds to the fastest Non-Food growth since October 2014. From July 2015, the three-month average total Non-Food sales was flat (online adjusted) in Scotland against a growth of 3.7% in the UK. Long term, at the UK level, the sector is projected to grow at three times the rate of the convenience sector up to 2023.</p> <p>The spatial implications for the network of centres are linked to the range of offer in existing centres, what retail space/ units will be required in the future and how this is tied into the wider retail and leisure ‘experience’ of the strategic centres. Due to the diversity of the network this will have different</p>

	<p>implications for each strategic centre.</p> <p>The long term trends such as positive forecasts for employment, unemployment and wages, look positive for retailers however the crucial factor will be when this will translate into higher levels of confidence and more transactions which has clear implications for the network of strategic centres.</p>
<p>Internet spending</p>	<p>The implication of increased internet spending for the network of strategic centres is that less physical space is required due to wider changes in how retailers are operating as the online shift has meant a pullback in terms of the need for so many physical stores. There are potential benefits of this for the centres around the 'click and collect' elements which could be situated in high footfall locations, including the strategic centres and adjoining transport hubs.</p> <p>There is the potential for 20% of comparison goods transactions to be completed online by 2023. This will have implications and provide opportunities for the network. As part of a wider strategic centre strategy each centre in the network will have to adjust and focus on how it can benefit from combining footfall generating uses with the increased use of technology being applied in people's everyday lives.</p>
<p>City region commercial market overview</p>	<p>The recent market improvements and transactions demonstrate that at the city region level there has been some improvement in the retailing sector and, as a result, investors' confidence as returned. The recent market movements do seem to suggest that growth is still focussed in the 'prime' comparison retail locations across the city region, including the City centre, Pollok, Easterhouse and East Kilbride.</p> <p>This has implications for the role and function of all our centres identified in the network. Given the policy objectives in the SPP there is a balance to be struck between the retail function and offer within each of the strategic centres in relation to its wider role and function. This focus on 'prime' locations is strengthened by the investment market which has implications for long term investment in some of the other strategic centres across the city region as they are not currently viewed by investors as attractive locations for additional comparison retail floorspace. This does create a distinction within the network between specific strategic centres that are seen as viable locations for additional strategic comparison retail floorspace development and the remainder which are no longer viewed as attractive locations for that type of development.</p>

5 Current and future trends that could impact on the Network of Strategic Centres

This section sets out the key current and future trends that are, and could, impact on the network of strategic centres. These trends identify areas that are evolving and altering in response to changing consumer and lifestyle trends and other market influences. These have, and will, continue to change the uses of strategic centres. It is important that we are aware of, and responsive to, these trends and influences. Our understanding of them will be vitally essential for how our network of strategic centres, many of which have a long history, will be potentially used and change in the future.

Sections 5.1 and 5.2 will be summarised below and the key implications will be set out in section 5.3.

5.1 Current trends ¹³¹⁴¹⁵¹⁶¹⁷¹⁸¹⁹

This section sets out the current trends that are occurring in relation to our network of strategic centres and draws on a range of publications and research.

The trends which have helped inform the policy approach adopted in Section 7 are as follows:

- A struggling economy
- An ageing society
- A multi-channel world
- Changing consumers
- The development market
- Accessing public services

5.2 Future Trends²⁰

This segment sets out the range of potential future trends that could impact on our network of centres and is underpinned by a collection of credible publications and research. These future trends have been collated under key headings and have helped inform the policy approach identified in Section 7. The headings are as follows:

- Political

¹³ http://www.clydeplan-sdpa.gov.uk/files/GCV_Retail_Study_Current_and_Future_Retail_Trends.pdf

¹⁴ <http://www.sas.com/offices/europe/uk/downloads/press/sas-verdict-retail2012.pdf>

¹⁵ <http://www.ryden.co.uk/sites/default/files/spr/Ryden%2077th%20Property%20Review%202015.pdf>

¹⁶ <http://planningni->

<consult.objective.co.uk/portal/dae/policy/spss/supporting?pointId=1390900593432&do=view>

¹⁷ <http://www.ryden.co.uk/sites/default/files/spr/Ryden%2077th%20Property%20Review%202015.pdf>

¹⁸ <http://planningni->

<consult.objective.co.uk/portal/dae/policy/spss/supporting?pointId=1390900593432&do=view>

¹⁹ <https://www.gva.co.uk%2Fscotland%2Fscottish-town-centres-september->

<2015&usg=AFQjCNEuhU28ZrOuKknc7sbAzi2lv6oNAg&cad=rja>

²⁰ http://www.clydeplan-sdpa.gov.uk/files/GCV_Retail_Study_Current_and_Future_Retail_Trends.pdf

- Economic
- Socio-Demographic
- Technological
- Environmental
- Legal

5.3 Implications of the current and future trends for the network of strategic centres

The trends below have helped inform the policy approach in Section 7 and their implications are reflected below.

Trends	Implications for GCV network of strategic centres
Current	
Changes in consumer expenditure	Overall consumers have more disposable income than has been the case historically but it is constrained at present.
Changes in consumer behaviour	Consumer behaviour has been driven by technological changes which have allowed more convenience for the user in terms of when to access services. The consumer is looking for a wider 'experience' when it comes to their leisure time and is willing to travel to locations where they feel the 'offer' is best for them. This has implications for the network of strategic centres as the offer in each of the centres will have to be realigned to suit the changing user's needs and wants. The issue of an ageing population means that for the centres 'localisation' may grow but these locations may have to be redesigned to meet the requirements of that changing demographic.
Multi-channel	The shift in online retailing has meant that some operators have reduced the number of physical stores and this could have an impact on a number of the centres in the network. Conversely there is a growing opportunity of tapping into the 'click/collect/en route shopping' trend and locate these services in strategic centres which have good transport hubs.
Operators	The rationalisation of some operators' portfolios may mean that some strategic centres are seen as less attractive propositions for locating to than others for comparison retailers. The growing shift of convenience operators into smaller stores and the 'localisation' of these activities as well as any spin off ancillary developments could be of benefit to some of our centres as town centre rents may prove to be attractive to some operators and help create a range of uses in these locations.
Development market	Despite the welcomed and continuing commercial investment in the network of strategic centres there is a possibility that investment activity in certain strategic centres could be detrimental to the other centres in the network. The economic conditions also mean there is a degree of reluctance by some to commit to new schemes due to costs and project delays. There is a role there for the public sector in conjunction with partners, to develop a Vision and development strategy for each strategic centre. Decision makers may be required to re-focus their strategic centre

	regeneration proposals, at least in the short term, which in the recent past may have been reliant upon a major national operator as the tenant/occupier.
Accessing public services	The SPP requirement to locate all footfall generating uses within town centres and the need to deliver the land use response to the relevant Community Planning Partnership objectives will help steer public services into the strategic centres. Planning authorities will therefore need to consider the appropriate type of development for their strategic centre to meet those requirements.
Future	
	<p>Future action plans for our strategic centres may have to address the following issues:</p> <ul style="list-style-type: none"> ▪ The growth in retail space, in recent decades, has not been matched by a removal of what may be perceived as redundant space elsewhere. ▪ Demand for large off-centre space grew extensively but has now abated due to changing consumer patterns. The 'race for space' of this form is over; though this is not to say some new stores will be not be proposed. Some large spaces will themselves/ may become redundant and need re-use. ▪ Many strategic centres have suffered high vacancy levels as a consequence of these trends and much space on the edge of such streets/centres is effectively redundant. This has led to, in some centres, a weakened perception of the places. ▪ Multiple retailers have reduced their space requirements at the chain level, but may need higher quality space in future at the large centre/flagship level as these are exhibition as well as selling spaces and draw from a wide regional catchment. ▪ With the withdrawal of retail from some centres, local opportunities may develop, if the cost balance can be developed appropriately. There will thus be more segmentation amongst centres and within centre hierarchies. ▪ Some strategic centres will increasingly need to concentrate development spatially to enhance footfall and services for visitors. This concentration will mean some centres will become less retail oriented, as leisure and other uses are introduced or increased. Not all centres can adapt in this way but for those that can find a clear and credible position, there is potential to reimagine themselves in new roles. <p>In terms of specific areas of retailing, there are different elements at work:</p>

- **Comparison** – chain based comparison retailers are reducing their space needs and withdrawing from lower order centres. Less space will be needed overall, although if circumstances are right then localisation may occur with local entrepreneurial businesses requiring space.
- **Convenience** – convenience goods retailers are requiring less large scale space and are focusing more on smaller, high-density locations in urban areas/high streets. There are issues with some superstore space and its ongoing use, though competitive forces will continue to add some large sites and certainly more discount unit space.
- **Bulky Goods Retailing** – there is likely to be a similar decline in bulky goods retailing and the need for space out of town is likely to reduce.
- **Other retailing sectors** – demand for space in high streets has increasingly come from discount retailers, convenience stores, food operators and specific sectors such as bookmakers, loan firms etc. Service uses are demanding space and often concentrating their activities. This has implications for perceptions of places.

Overall therefore this would suggest that in general:

- Higher order centres will continue to be attractive and to see demand for space and attract consumers from a variety of other places.
- Lower order centres will contract quite markedly and lose some of their functions. Some of this space could be re-used but as the centre declines in wider attractiveness so it will decline in space needs.
- Those in the middle of this continuum will have to work hard to maintain their role and position. They will be subject to the decisions elsewhere by retailers and others and by perceptions of places by consumers. Concentration of activities and development of attractiveness in centres will be important.

Strategically, all places will have to think about the opportunities for spatial concentration of land uses, the availability of suitable sites in centres, investment to maintain or increase attractiveness and ways of generating footfall in a place. Hard public investment decisions will play a role in possibly altering the trajectory of specific centres, but may not be possible in all cases.

6 Network of strategic centres' overview

This section outlines an overview of the network of strategic centres. This has supported and informed the policy approach adopted in Section 7.

Network of strategic centres' – SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Continuing success of Glasgow city centre as 2nd ranked retail location in UK ▪ Successful legacy of hosting world class events i.e. Commonwealth Games and MOBO Awards and the wider benefits to the network of the visitor economy ▪ Continuing commercial investment in the network of strategic centres ▪ Diversity of existing centres' across the network, including specific leisure offers ▪ Strong local independent retail offer in some strategic centres ▪ Good quality physical environment ▪ Good accessibility and public transport hubs across the network ▪ Strong centre management structures and increasing awareness of the opportunities for each strategic centre ▪ Strong policy foundation for strategic centre development 	<ul style="list-style-type: none"> ▪ Vacancies and potential obsolescence of some floorspace/ retail unit specification ▪ Low and falling retail rents in some strategic centres' ▪ Limited private sector centre development/investment in some of the strategic centres' ▪ Heavy traffic flows and congestion leads to disincentive for users ▪ Limited and fragmented data sources
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Increasing the range and diversity of uses within town centres, including civic, employment and residential ▪ The City Deal announcement of £1.13Bn for the city region ▪ Strong visitor economy and the need to tie into that in future town centre action plans ▪ Innovative mechanisms available such as SPZs, BIDs and Enterprise Zones ▪ Build on strong performance of a number of the strategic centres and build on the assets of our centres to drive future strategies 	<ul style="list-style-type: none"> ▪ Increasing concentration of the retail offer within fewer centres creating a stratified network. ▪ The continuing well-being of the city centre as the key location in the city region ▪ Fragmentation of ownership in some centres ▪ Unrealistic ambitions for some strategic centres' ▪ Lack of agreed Town Centre Strategy and Action Plan for some centres ▪ Limited public sector expenditure in the short to medium term ▪ Limited sustainable transport

i.e. heritage offer etc.	access to some of the strategic centres
--------------------------	---

6.1 Clydeplan Main Issues Report (MIR) – January 2015²¹

As part of the MIR process, Clydeplan and the constituent Authorities undertook a review of the network of strategic centres. The elements of the review included:

- The outputs from the Strategic Centre Profiles²² which examined:
 - a. Time series planning application data – (from 2007-12) for each strategic centre
 - b. Time series floor space breakdowns for each strategic centre
 - c. Connectivity analysis for each strategic centre
 - d. 'Opportunities' mapping for each strategic centre
 - e. National Survey of Local Shopping Patterns (NSLSP) times series shopper population data overview for each strategic centre
 - f. Updated role and function of the strategic centres and the issues, actions and challenges for each of them
- An overview of the existing network of strategic centres, including an analysis of the existing relationships between the centres in the network utilizing the 2012 National Survey of Local Shopping Patterns (NSLSP) comparison goods dataset – (see Appendix B)
- Issues and recommendations to consider emerging from the review

Issues to consider from the review

The key issues were as follows:

1. The current and potentially continuing segmentation, driven by comparison retail trends, within the network and the implications on the city centre and the wider network
2. Long term reduction in the City Centre's shopping population²³
3. Past investment in strategic centres - Braehead, Pollok and Easterhouse - that have a strong relationship with the City Centre and other strategic centres in the network and the continuing demand for investment in these locations²⁴
4. In strictly strategic comparison retail development terms, in general:
 - Higher order centres will potentially continue to be attractive and to see demand for space and attract consumers from a variety of other places.
 - Lower order centres could contract quite markedly and lose some of their functions. Some of this space could be re-used but as the centre declines in wider attractiveness so it will decline in space needs.
 - Those in the middle of this continuum will have to work hard to maintain their role and position. They will be subject to the decisions elsewhere by retailers and others and by perceptions of places by consumers. Concentration of activities and development of attractiveness in centres will be important.

²¹ <http://www.clydeplan-sdpa.gov.uk/sdp/main-issues-report-january-2015>

²² <http://www.clydeplan-sdpa.gov.uk/sdp/main-issues-report-january-2015>

²³ See section 6.3 and Appendix B for further details

²⁴ See Sections 6.2, 6.3 and Appendix B for further details

5. A need to re-imagine each of the strategic centres role, function, challenges and actions in light of the changes that are taking place in both the network and the wider operating context. Centres will increasingly need to concentrate development spatially to enhance footfall and services for visitors. This concentration will mean some centres will become less retail oriented, as leisure and other uses are introduced. For those strategic centres that can find a clear and credible position, there is the potential to reimagine themselves in new roles i.e. build a strategy that focuses on the strengths of each particular centre. For example, a strategy based around cultural and heritage or public sector assets etc.
6. Strategically, all places, and actors in the process, will have to think about the opportunities for spatial concentration of land uses, the availability of suitable sites in centres, investment to maintain or increase attractiveness and ways of generating footfall in a place. Public investment decisions will play a role in possibly altering the trajectory of specific strategic centres.
7. The potential opportunities of City Deal for the network of strategic centres

Recommendations of the review

Whilst the review of the strategic centres network identified a number of changes since SDP 1 (May 2012), it was felt that these have not fundamentally changed the nature and purpose of the current network.

It was thus recommendation of Clydeplan to retain the existing network of 23 strategic centres as it is felt that the existing network requires time to reflect on the new SPP and 'town centre first' principle for significant footfall generators and the role of health checks related to town centre strategies.

Changes since MIR

As part of the MIR consultation process there were representations requesting that both:

- Milngavie and;
- Govan

be added to the network of strategic centres. Following discussions with the relevant respondents it was felt that the planning context and market conditions within which the SDP's network of strategic centres operates has significantly changed over the last few years. Changing consumer and lifestyle choices and other market influences have seen significant changes in not only how the retail sector operates but also how town centres are responding and adapting to those changes. The new SPP has seen the introduction of a range of new requirements which will take time to develop and be implemented for each town centre across the city region. All of this will have an impact on the current network of strategic centres which are being taken through their respective Local Development Plans. Therefore, in terms of the long term future planning of the city region, it is considered that at this time the most pragmatic response is to allow time for these policy and market influences to bed in to the existing network rather than seek to add other centres in isolation. It is instead more appropriate to consider all potential centres in terms of role and function as part of any new revised network for the next Strategic Development Plan.

6.2 Network of strategic centres – context

Each Authority currently undertakes an annual outlet survey which examines a range of factors in each of their strategic centres and this has provided the foundation of the analysis presented here. This has been augmented with other local data including, planning application trends, Assessors and economic data. The main report provides a summary of this information, for a full overview of each centre, please see the Strategic Centre Profiles²⁵.

One of the requirements of the SPP approach to centres is that there is a greater emphasis being placed on joint working between all the actors involved in centres and more efficient use of data. This has raised a number of issues for the Authorities around data collection and resource availability which was highlighted in the Scottish Government published Draft SPP consultation responses document²⁶.

This section of the report splits the overview into the following sections:

- Local Authority based data analysis of the strategic centres (this section)
 - Floorspace breakdown per centre
 - Scottish Planning Policy – Town Centre Health Checks and Strategies requirements
 - Strategic planning application trends 2010 -15 per centre

For a fuller picture of the centres these outputs must be read in conjunction with the Strategic Centre Profiles²⁷ and Appendix A.

Floorspace breakdown per centre²⁸

It should be noted that floorspace breakdown is a single indicator when it comes to analysing centres and the changes within them. It doesn't identify the factors that underpin floorspace change so this data must be read in conjunction with the Strategic Centre Profiles and sections 4 and 5. This section attempts to identify the broad strategic trends that can be seen in changes in floorspace in the strategic centres since 2010.

The key trends across the network since 2010 are as follows:

- Class 1 is still the main role for the strategic centres
- Rising vacancies remain an issue across some centres except those with more modern units/configuration (City Centre/Pollok/Easterhouse)
- Some larger strategic centres such as East Kilbride show vacancies increasing and a move towards non Class 1 uses
- There has been no significant change in floorspace breakdowns over the 5 year period in some centres. For example, this includes Shawlands, Hamilton and Greenock

²⁵ See Additional Supporting Material Background Report 5 - www.clydeplan-sdpa.gov.uk/proposedplan2016

²⁶ <http://sh45inta/Resource/0043/00437083.pdf>

²⁷ See Additional Supporting Material Background Report 5 - www.clydeplan-sdpa.gov.uk/proposedplan2016

²⁸ It should be noted that despite there being limited consistency in how each Authority undertakes their survey and analysis there is a consistent approach at Local Authority level which means that there is consistency at a specific centre level.

- Some centres have diversified their floorspace over time. For example, Lanark has increased levels of Sui generis and Class 1 but decreased levels of Class 2. This may be due to the specific geography and offer in this market town.
- It should be noted that just because there a rise/fall in Class 1 etc this doesn't necessarily translate simply into floorspace being taken up or not but may relate to changes in units already in use. There is a wider issue of why the elements of use class order are being retained or changed. This is a key element that ties into the requirement for each Authority to have town centre strategy in place which sets out a vision, role and function for that particular centre.
- Overall, it is a picture that broadly identifies that some of the less strategically retail focussed centres have begun to diversify their floorspace, including Kirkintilloch and Barrhead

Please note all of the above echoes the analysis in Sections 4 & 5.

Scottish Planning Policy – Town Centre Health Checks and Strategies requirements

SPP stipulates that Local Authorities must produce a town centre strategy in conjunction with a range of partners, including the commercial sector. The aim of the strategy is to create an agreed clear vision for the centre and identify the delivery mechanisms required.

At present, out of the 23 strategic centres, 9 centres have a strategy in place, 10 centres have one being produced and the remainder do not have a strategy currently in place presently but there is a commitment for all centres to undertake one.

Strategic planning application trends 2010-15 per centre

The key trends across the network are as follows:

- Overall there has been limited development activity out with the more modern comparison retail destinations (City Centre, Braehead²⁹, Easterhouse and Pollok)
- Pressure in all centres, including parts of the city centre, for change of use from Class 1 to Classes 2 and 3 i.e. from retail to office/service uses and restaurants/ cafes
- There have been a number of convenience applications in centres and this activity has continued unabated across the period
- Reconfiguration of some existing malls/shops/areas in the centres in order to make them more desirable to end users and combat vacancies in some locations
- In the more modern format locations there was an application in 2012 in Easterhouse (leisure/retail based) which was approved and development is now underway. The city centre remained an attractive proposition and destination for large scale retail proposals. There were no applications during the period at Braehead for expansion. But a strategic scale proposal at Pollok was approved in 2015 and has consent for the following:
 - Up to 23,500sqm (gross) new comparison retail floorspace

²⁹ Please note that there has been no strategic levels of floor space development at Braehead (within the designated strategic centre boundary) since Xscape opened in 2006 – with the exception of new office pavilions.

- Implementation of 7,728sqm comparison consented retail floorspace (12/0386/DEC)
- Up to 6000sqm employment floorspace,
- Up to 18,500sqm Leisure floorspace (adventure sport activities)
- Up to 6000sqm hotel floorspace (110 bed hotel)
- Reconfiguration of car parking to provide an additional 2,215 spaces (total spaces: 6716)
- Transport Infrastructure Improvements
- Public realm/ green infrastructure provision.
- The retail floorspace is within Pollok Town Centre. 15,000 sqm of the proposed leisure floorspace is to be located outside the town centre on land to the east of the M77.

Overall, these trends reflect those identified in Sections 4 and 5 and suggest limited strategic scale development activity out with the more modern format locations. The other centres applications reflect the reconfiguring of these centres based on a changing role and function and this is an element that will have to be reflected in any current or future strategic centres strategy in terms of defining the future aspirations, role and function of a particular centre.

Please see Appendix A for a fuller overview of this data for each of the strategic centres.

The SDP places the city centre at the apex of the network and states that all development management decisions should take into consideration the impacts of proposals across the network on it. Given the scale and nature of development taking place there are only certain centres which can accommodate strategic levels of retail and leisure floorspace across the city region. So in recent times development activity has focussed additional strategic levels of development to four locations in the city region – Glasgow city centre, Easterhouse, Pollok and Braehead. This reflects the evidence set out in Sections 4 and 5 respectively. These three strategic centres alongside the city centre represent locations where development interest is taking place and the scale of the proposed developments involved could have an impact on the city centre, and the other strategic centres, and this is a matter that would be assessed as part of any planning application process to comply with the SDP.

Figure 1 Proposed strategic levels of floor space in the strategic centres³⁰

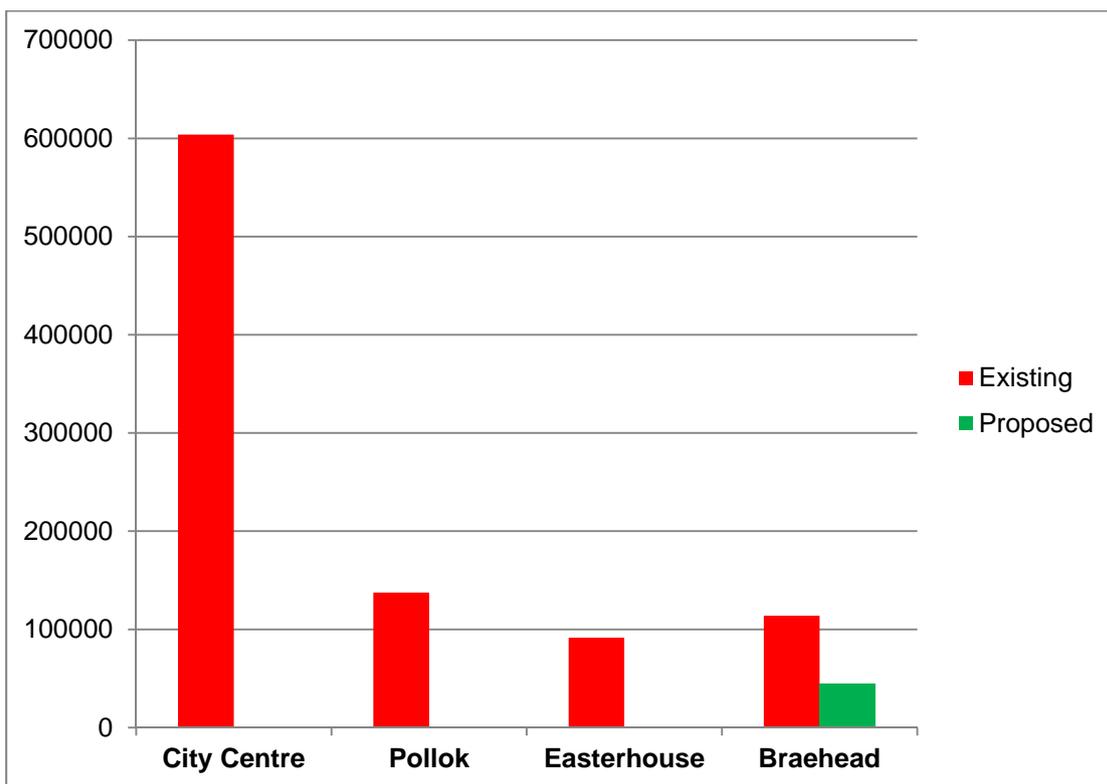


Figure 1 above sets out the proposed strategic levels of floor space which may come on-stream subject to Local Authority decisions across the 23 strategic centres. At present, there are only four locations that have seen or have live proposals.

The recent consent at Buchanan Galleries and Pollok has seen the floor space increase in the city centre by 45,000sqm (11%) and by 48,000sqm (54%) respectively. The other proposals could potentially mean the floor space increasing at Braehead by 44,000sqm (39%). Easterhouse has no proposed floorspace additions at present but it did recently, in 2012, have an application approved and the development relating to that is underway. This is reflected above in the figures for that centre. Should these proposed floorspace increases come to fruition then these development pressures may have an impact on wellbeing of the city centre and the wider network of strategic centres and this is a matter that would be assessed as part of any planning application process to comply with the SDP. The wider regeneration objectives established in the existing SDP mean that the national development at Ravenscraig will deliver significant experiential retail related floorspace, but it is anticipated this will have some form of impact upon the centres in the east of the city region, mainly Motherwell and Wishaw.

6.3 NSLSP 2012 Comparison shopping data analysis for the network of strategic centres

The following section sets out the key headlines of the analysis of the comparison shopping trends across the network of strategic centres. Please see Appendix B for the full detailed analysis that underpins these headlines.

³⁰ Please note that this graph illustrates retail and leisure floorspace only in terms of the city centre. It does not include other strategic developments in the city centre e.g. office etc.

GCV Network of Strategic Centres

- The shopping population for the full catchment of the GCV area has increased by 26,888 shoppers (or 1.6%) to 1.74 million since 2008, while the spend potential has increased by £211 million (or 5.3%) to £4,204 billion) since 2008.
- The network of strategic centres has evolved since 2002 into a series of inter-connected centres which, by means of their relationships with each other, can be grouped into four broad geographic areas: North and West, South and West, North and East, and South and East. An element of separation has taken place within the network, and although the network remains dominated by Glasgow City Centre, which has influence across all sectors, it is now also strongly influenced by a number of new or expanded major centres, such as Braehead, Easterhouse and Pollok which have benefited from most of the recent investment. These centres have a strong relationship with the City Centre, but also attract shoppers from the smaller centres within their catchment, which also provide a complimentary role.

Glasgow City Centre

- Glasgow City Centre is the second most important comparison goods location (after London) in the UK, and draws trade from a wide range of locations throughout the UK.
- Despite ongoing investment, Glasgow City Centre's shopping population has reduced by 76,000 (8%) since 2002, with most of this fall occurring since 2008. The impact of more recent investment in modern mall formats at Braehead, Easterhouse and Pollok, along with the greater resilience of centres, such as Clydebank, Coatbridge and Hamilton, appears to be contributing to a shrinking of the City Centre's shopper population.

Strategic Centres

- Since 2008, the emergence of Pollok has started to impact not only on the City Centre, but on other centres, such as Paisley and Barrhead. Pollok's growth also appears to have affected the remaining major centre, East Kilbride, which has seen a 20% drop in its shopper population in this period. Braehead, after a period of significant growth between 2002 and 2008, has remained reasonably stable after 2008.
- With the exception of Paisley, which has been affected by Braehead, Pollok and Glasgow City Centre, all of the centres which are ranked between £50m and £250m in terms of their spend potential have shown growth by this measure between 2008 and 2012. These centres are a mix of traditional centres with more recent additions, such as Coatbridge, Greenock, Motherwell, Parkhead and Hamilton, and those based on more modern formats, such as at Clydebank, Easterhouse and Cumbernauld.
- Smaller centres, such as Barrhead, Partick/Byres Road and Shawlands do not attract shopper populations from out with their own catchment, and are not primarily comparison retail destinations. They tend to be significantly affected by larger retail centres in neighbouring locations, but fulfil other non-retail functions which contribute to their strategic role.

6.4 NSLSP (2012) Bulky goods data analysis

The context of bulky goods retailing with regard to the role and function of the strategic network of centres must also be considered. Bulky goods retailing is often focussed in out-of-centre locations or in commercial centres, but still fulfils a strategic centre role as well and is important to the roles and functions of both strategic centres and commercial centres.

Figure 2 below lists the bulky goods rankings from NSLSP (2012), listed in order of full catchment shopper population.

Figure 2: GCV locations bulky goods rankings (NSLSP 2012)

Location/Centre	Local Authority	Town centre/ Commercial centre	Shopping Population	Catchment Population
GLASGOW CITY CENTRE	Glasgow	TC	425,563	4,172,937
BRAEHEAD RETAIL PARK AND SHOPPING CENTRE	Renfrewshire	TC/CC	191,655	2,911,451
FORGE RETAIL AND SHOPPING PARK (Parkhead)	Glasgow	TC	89,918	1,801,856
HAMILTON	South Lanarkshire	TC	75,632	685,704
EAST KILBRIDE	South Lanarkshire	TC	69,594	1,379,229
STRATHKELVIN RETAIL PARK	East Dunbartonshire	CC	69,119	616,282
BIRKENSHAW INDUSTRIAL ESTATE	North Lanarkshire	CC	60,825	1,101,003
GREENOCK	Inverclyde	TC	56,518	187,357
KINGSGATE RETAIL PARK	South Lanarkshire	CC	54,619	809,302
CLYDEBANK	West Dunbartonshire	TC/CC	49,906	934,979
GREAT WESTERN RETAIL PARK	Glasgow	CC	48,570	800,678
PAISLEY	Renfrewshire	TC	30,458	1,037,745
ABBOTSINCH RETAIL PARK	Renfrewshire	CC	28,500	677,755
IKEA	Renfrewshire	CC	27,304	2,314,490
AULDHOUSE RETAIL PARK	Glasgow	CC	26,931	423,106
FARADAY RETAIL PARK	North Lanarkshire	CC	25,712	415,218
SILVERBURN (Pollok)	Glasgow	TC	24,519	1,122,199
COATBRIDGE	North Lanarkshire	TC	23,526	710,925
CUMBERNAULD	North Lanarkshire	TC	19,526	341,601
MOTHERWELL	North Lanarkshire	TC	18,402	408,053
DRUMCHAPEL	Glasgow	TC	17,234	459,185
GLASGOW NITSHILL ROAD	Glasgow	CC	15,112	590,291
PALACE GROUNDS SHOPPING PARK	South Lanarkshire	CC	14,646	360,969
GLASGOW FORT SHOPPING PARK (Easterhouse)	Glasgow	TC	13,733	1,202,743

Glasgow City Centre is at the top of the list with over 400,000 shoppers (4,170,000 catchment), and the town centres of East Kilbride, Hamilton, Paisley, Clydebank and Greenock also feature. Braehead serves the second largest catchment (2,900,000 shoppers) and the Forge Retail and Shopping Park at Parkhead serves the third largest catchment (1,800,000 shoppers).

Many bulky goods commercial centres are solely retail locations and car-based by the nature of their offer of bulky furnishings, DIY and 'white' domestic electrical goods. This often includes large convenience superstores with an associated non-food offer. However, some commercial centres can evolve into general comparison goods shopping destinations, beyond their intended role and function, to the potential detriment of the wider network of strategic centres, as the consequence of an accumulation of changes to the conditions placed on individual units over time

The main strategic issue associated with bulky goods retailing is the strength of a number of commercial centre elements out with the city centre. Nonetheless, the potential for these locations to draw a detrimental level of general comparison goods trade from strategic centres does remain of concern. There is a need to ensure the role and function of the strategic network of centres is identified and maintained with particular regard to comparison goods and that bulky goods commercial centres do not evolve into comparison goods centres with a potentially detrimental impact and this is a matter that would be assessed as part of any planning application process.

6.5 The complementary role of the network of strategic centres and the Strategic Economic Investment Locations³¹

The Spatial Development Strategy identifies 22 Strategic Economic Investment Locations (SEILs) which will support the SDP's long term vision of a rebalanced low carbon economy, boosting competitiveness and tackling inequality. The SEIL's have been selected because they are seen as the priority locations to promote the Scottish Government's key economic sectors and Scottish Enterprises locational priorities, and are in sustainable locations.

SPP identifies a town centre first principle which promotes an approach to wider decision-making that considers the health and vibrancy of town centres. It states that planning for town centres should be flexible and proactive, enabling a wide range of uses which bring people into town centres. The planning system should:

- apply a town centre first policy when planning for uses which attract significant numbers of people, including retail and commercial leisure, offices, community and cultural facilities;
- encourage a mix of uses in town centres to support their vibrancy, vitality and viability throughout the day and into the evening;
- ensure development plans, decision-making and monitoring support successful town centres; and
- consider opportunities for promoting residential use within town centres where this fits with local need and demand

This focus on town centre first and the need to encourage uses which generate footfall will have implications for a range of activities, including office, education, visitor economy and culture orientated economic facilities, being encouraged into town centres. The intention is to direct development both to assist in the regeneration

³¹ Please see Background Report 6 – www.clydeplan-sdpa.gov.uk/proposedplan2016

of the Strategic Centres listed and also as they represent good sustainable locations for access by public transport. These opportunities should be identified by the respective town centre strategy.

It is felt that both approaches to promoting economic development are compatible given the scale and type of economic uses being promoted in the SEILs will be different to those being promoted by town centres.

7 Clydeplan Network of Strategic Centres

Network of Strategic Centres

Strategic centres are the hub of the city region's communities. The strategic centres of the future need to be vibrant centres for living, culture, entertainment, leisure, shopping, business and civic activity. It is important that the strategic centres have a clear understanding of their roles and functions. Certain strategic centres are less focussed in comparison retail terms, but are of strategic importance in terms of their wider roles and functions and the communities which they serve.

The challenges strategic centres face are structural not cyclical. These locations are going through a period of, often profound change, but no single approach will provide a solution to each centre. Each centre has its own character, distinct role and function and related challenges. It is important that these challenges are addressed to reflect these changes including changing consumer habits, an ageing population, new technology, development of e-commerce and the rise of the large scale web based operators.

In support of this Scottish Planning Policy sets out a "town centre first" principle which promotes a broader perspective to decision-making that considers the vitality, viability and vibrancy of town centres. It states that planning for town centres should be based on a sequential approach, enabling a wide range of uses which generate significant footfall, including retail and commercial leisure, residential, offices, civic, community and cultural facilities.

The Vision and Spatial Development Strategy requires the network of strategic centres to be protected and enhanced, with investment required to support their long-term respective roles and functions particularly in terms of quality of offer both throughout the day and into the evening, diversity, public realm, environment, continuing sustainable accessibility and the promotion of footfall generating uses.

There is a need to diversify and re-configure each of the strategic centres role, function, challenges and actions, where required. This could mean some centres becoming less retail oriented, as leisure and other uses are introduced. All parties involved in the process will have to identify the opportunities for spatial concentration of land uses, the availability of suitable sites in centres, investment to maintain or increase the attractiveness and support for generating significant footfall in a centre, including public sector investment decisions.

The Schedule below lists the network of strategic centres, their challenges and the range of interventions that will be required to support their long-term roles and functions. Local Authorities, through their respective LDPs and related Action Programmes, need to take forward the interventions outlined in the Schedule below.

Glasgow City Centre

The City Centre's strategic economic significance and diverse range of core functions set it apart from all other strategic centres. Its long-term future is fundamental to the economic well-being of the city-region and the Spatial Development Strategy requires that its future is secured through continuing investment and reconfiguration.

Glasgow City Centre is at the apex of the network of strategic centres due to the following characteristics:

- it is the employment, civic and cultural core of the city-region;
- the scale and reach of its catchment;
- its UK significance as a retail destination;
- its central accessibility by public transport modes; and,
- its growing international role as a key visitor destination.

Like all the strategic centres in the network, the City Centre is also experiencing challenges. Despite ongoing investment, the City Centre's comparison shopping population has reduced over the last decade. It is now also strongly influenced by a number of new or expanded major strategic centres, such as Braehead, Easterhouse and Pollok which have benefited from recent investment and that, along with the greater resilience of other strategic centres, appears to be contributing to a shrinking of the City Centre's shopper population.

The Spatial Development Strategy requires the City Centre's role to be safeguarded by the Clydeplan Local Authorities during the exercise of their development management function and provision is made in the policy below, the City Centre Joint Strategic Commitment and Assessment of Development Proposals section of the Plan to reflect that requirement.

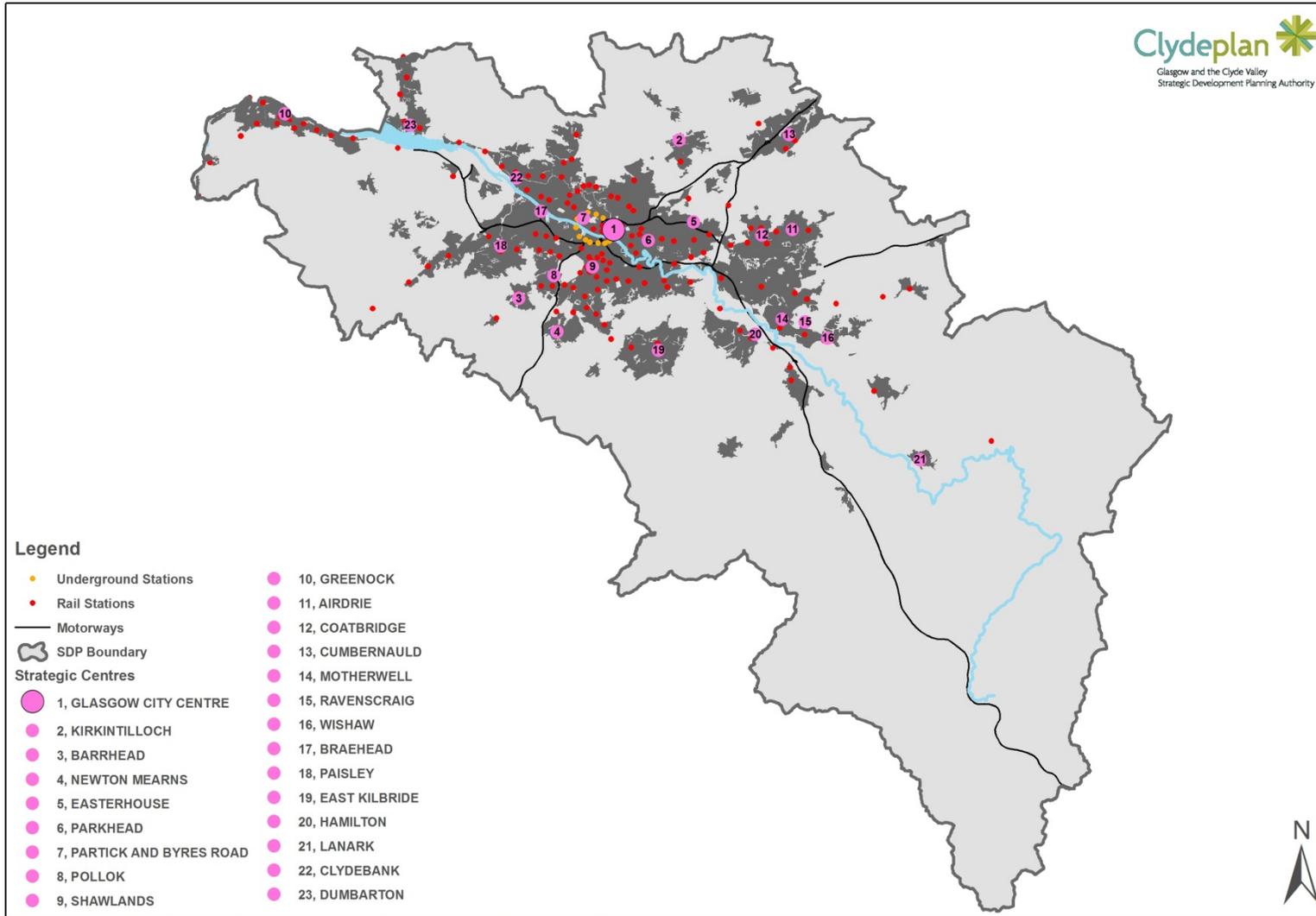
The schedule below sets out the strategic centres within the network, their status, role and function, challenges and future actions.

Policy - Network of Strategic Centres

Strategic centres are the hub of the city region's communities supporting a range of economic and social activities. It is recognised that the economic and social significance of Glasgow City Centre and its diverse range of core functions sets it apart from all other strategic centres.

To support the Vision and Spatial Development Strategy all strategic development proposals should

- protect and enhance the development of the network of strategic centres in line with their role and function, challenges and future actions set out in Schedule;
- protect and enhance the long term health of Glasgow City Centre to ensure there is no detrimental impact on its role and function, as set out in Schedule and in support of Joint Strategic Commitment - Glasgow City Centre;
- recognise that whilst the Network of Strategic Centres is the preferred location for strategic scale development such proposals are subject to the sequential approach set out in Scottish Planning Policy and the assessment of impact on the other Strategic Centres in the network to ensure that there is no detrimental impact on their role and function.



© Crown copyright and database right 2016. All rights reserved. Ordnance Survey Licence number 100032510.

Schedule - Network of Strategic Centres

Strategic Centre	Status	Role and Function	Challenges	Future Actions
Glasgow City Centre	City Centre	<p>The City Centre is at the apex of the Network by virtue of the scale and diversity of its functions;</p> <ul style="list-style-type: none"> • it is a retail location of UK significance; • it is the location of a number of higher and further education establishments; • it is the prime office location within the city region; • it is a national and international transport hub and visitor economy destination which is supported by its wide range of leisure, entertainment and cultural facilities. 	<ul style="list-style-type: none"> • diversion of expenditure from the City Centre to other retail locations and e-tailing; • spatial contraction of the prime retail pitch; • delivery of development opportunities; • quality of public realm; • accessibility across the City Centre and connections to Glasgow Airport. 	<ul style="list-style-type: none"> • support the implementation of the Tax Increment Finance scheme for the Buchanan District area; • take forward the City Centre Strategy; • take forward the City Centre Traffic and Transportation Strategy; • support the delivery of the Sauchiehall Street Business Improvement District; • continue to invest in the provision of Grade A office space.
Airdrie	Town Centre	Retail, community, healthcare, cultural, leisure ,civic	<ul style="list-style-type: none"> • retail contraction; • encourage a wider mix of town centre uses; • enhance activity throughout the day and evening; • regenerate the historic townscape. 	<ul style="list-style-type: none"> • finalise the Draft Airdrie Town Centre Action Plan and take forward the agreed outcomes.
Barrhead	Town Centre	Civic, community, employment, business	<ul style="list-style-type: none"> • retain and sustain the regeneration initiatives; • augment and consolidate the 	<ul style="list-style-type: none"> • establishment of a Business Improvement District; • produce a Town Centre strategy

			<p>town centre's distinctive character;</p> <ul style="list-style-type: none"> • competition from car borne retailing. 	<p>improve residual unattractive elements;</p> <ul style="list-style-type: none"> • enhance Lavern Water opportunity; • enhance cycle routes.
Braehead	Commercial Centre	Retail, leisure, employment, business	<ul style="list-style-type: none"> • secure continued investment; • enhance the retail, commercial and business offer and quality of place through the provision of a range of uses to strengthen urban character; • enhance the quality of the public realm; • ensure that Braehead is central to the ongoing regeneration of Renfrew Riverside delivering new development as well as investment within the context of the Glasgow and Clyde Valley City Deal. 	<ul style="list-style-type: none"> • develop a Braehead Centre Strategy and Action Plan; • consider planned investment within the context of a masterplan ensuring co-ordinated action in support of the Clyde Waterfront and Renfrew Riverside City Deal projects facilitating the delivery of: <ul style="list-style-type: none"> • a range of retail, commercial and business uses to enhance the existing offer and employment opportunities; • improved integration with surrounding residential areas through the provision of walking and cycling routes; • public transport improvements including the provision of a new hub; • new residential opportunities; • green network enhancements; and new civic space. • based on ongoing monitoring of investment activity and health checks review and consider the status of Braehead.
Clydebank	Town Centre	Retail, leisure, civic, employment, business, public transport hub, community	<ul style="list-style-type: none"> • quality of retail offer compared to similar sized/format town centres; • quality of environment in parts; 	<ul style="list-style-type: none"> • development of key sites and buildings to enhance retail and leisure offer; animate the Forth and Clyde Canal and increase town

			<ul style="list-style-type: none"> • quality of evening/leisure offer; • public transport facilities. 	<ul style="list-style-type: none"> • centre population and enterprise; • Improve accessibility, particularly through an enhanced public transport interchange, and linkages to the Queens Quay 'Changing Place'.
Coatbridge	Town Centre	Retail, community, healthcare, cultural, leisure, business	<ul style="list-style-type: none"> • retail contraction; • vacancy issues and condition of stock; • narrow mix of town centre uses; • build on the success of recent investments in the town centre. 	<ul style="list-style-type: none"> • finalise the Draft Coatbridge Town Centre Action Plan and take forward the agreed outcomes .
Cumbernauld	Town Centre	Retail, civic, community, employment, education, business	<ul style="list-style-type: none"> • retail contraction; • poor quality environment for users; • vacancy issues; • lack of quality civic space; 	<ul style="list-style-type: none"> • finalise the Draft Cumbernauld Town Centre Action Plan and take forward the agreed outcomes.
Dumbarton	Town Centre	Retail, civic, employment, business, public transport hub, health, community	<ul style="list-style-type: none"> • vacancy issues; • competition from other retail locations; • low business/pedestrian activity; • connectivity issues. 	<ul style="list-style-type: none"> • delivery of development on key sites within the town centre including new Council offices and residential development; • improve the quality of connections within the town centre and along the waterfront including to Dumbarton Castle; • create/enhance green network.
East Kilbride	Town Centre	Retail, business, economic, civic, health, community, leisure uses, public transport hub	<ul style="list-style-type: none"> • competition from other retail locations; • need for more marketable floorspace; • complicated layout and connections between the 	<ul style="list-style-type: none"> • reconfiguration of retail floorspace and rezone the shopping centre to create differentiated shopping trips; • support investment to maintain and grow the town centre's role and function;

			<ul style="list-style-type: none"> variety of uses; improve the internal and external fabric of the shopping centre; accessing funding opportunities; raise the profile of the town centre and potential of the visitor economy for both the day and evening economy. 	<ul style="list-style-type: none"> progress funding applications to support a range of activities including incubation units, business support, training, major refurbishments; redevelopment of public facilities. renew/replace/refurbish building fabric; re-launch the shopping centre to a wider catchment with a new brand and identity.
Easterhouse	Town Centre	Retail, commercial, leisure, civic, community	<ul style="list-style-type: none"> need for investment to improve the quality of the Shandwick Shopping Centre; need to improve linkages between different parts of the town centre and to adjoining neighbourhoods. 	<ul style="list-style-type: none"> deliver actions relating to the Centre set out in the Easterhouse Strategic Development Framework (SDF)
Greenock	Town Centre	Retail, civic , leisure, community, employment, business, residential	<ul style="list-style-type: none"> address the effects of declining population and continue to improve the quality of the environment; strengthen the retail role to take account of changing shopper habits and patterns. 	<ul style="list-style-type: none"> continue to improve the public realm and retail offer, including the complimentary role of Port Glasgow and investigate actions needed to undertake a health check for the town centre.
Hamilton	Town Centre	Retail, business, economic, civic, education, health, community, leisure uses, public transport hub	<ul style="list-style-type: none"> competition from other retail locations; underused floorspace and key vacant buildings in town centre; ongoing maintenance and enhancement of public realm and the accessibility of the town centre; 	<ul style="list-style-type: none"> take forward the Hamilton Business Improvement District; review options to improve public realm and the accessibility of the core area. improve the diversity, offer and choice to strengthen both the day and the evening economy.

			<ul style="list-style-type: none"> • limited retail offer and low footfall. 	<ul style="list-style-type: none"> • encourage a range of uses to increase footfall.
Kirkintilloch	Town Centre	Retail, cultural, civic , community	<ul style="list-style-type: none"> • reduction in the quantity and quality of retail offer and competition from larger retail locations; • lack of evening activity; • limited public transport accessibility ; • priority imbalance between pedestrians and traffic; • better integration between the Cowgate with Townhead areas. 	<ul style="list-style-type: none"> • continued improvements to public realm through the ongoing masterplan; • improved linkages with the Forth and Clyde Canal and Antonine Wall to better exploit the visitor economy potential of the town; • modernise the core retail area at Cowgate to retain vitality and enhance the town centre.
Lanark	Town Centre	Tourism and cultural, heritage assets, retail, civic and community, public transport hub	<ul style="list-style-type: none"> • limited population catchment; • quality of retail offer and vibrancy of the town centre. 	<ul style="list-style-type: none"> • develop the retail offer, evening economy and the town centre's administrative role for the wider rural area; • improve visitor economy and cultural and historical opportunities and linkages within the town centre.
Motherwell	Town Centre	Retail, civic, community, employment, commercial	<ul style="list-style-type: none"> • retail contraction; • proximity to Ravenscraig and uncertainty over timescales for its development; • significant barriers to pedestrian movement within the town centre; • limited evening economy; • ensure that public services and facilities remain within the town centre. 	<ul style="list-style-type: none"> • finalise the Draft Motherwell Town Centre Action Plan and take forward the agreed outcomes.

Newton Mearns	Town Centre	Retail, civic, community, employment, business	<ul style="list-style-type: none"> • limited scope for growth; • competition from other retail locations. 	<ul style="list-style-type: none"> • potential to reconfigure civic uses to be explored; • introduce a range of appropriate complementary uses to assist vibrancy; • enhancement of adjoining community uses to be explored; • produce a Town Centre strategy.
Paisley	Town Centre	Cultural, heritage, retail, civic, community, leisure, education uses, public transport hub	<ul style="list-style-type: none"> • to capitalise on the potential of cultural and heritage assets to stimulate regeneration; • address underused upper floors and vacancy in core areas; • enhance and diversify the offer and choice to strengthen the evening economy. 	<ul style="list-style-type: none"> • implement Paisley Town Centre Heritage Asset Strategy and take forward a bid for UK City of Culture 2021; • deliver programme of public realm enhancement works to the historic fabric; • deliver varied events/cultural programmes; • encourage a range of uses and increase town centre population.
Parkhead	Town Centre	Retail, commercial, leisure, civic, community	<ul style="list-style-type: none"> • poor quality streetscape and high street shopping environment; • vacancy issues focussed on around Parkhead Cross. 	<ul style="list-style-type: none"> • support delivery of the second phase of the Townscape Heritage Initiative aimed at improving shopfronts and the quality of the retail environment around Parkhead Cross.
Partick/Byres Rd	Town Centre	Retail, commercial, leisure, civic, community	<ul style="list-style-type: none"> • pressure for non-retail uses focussed on the Byres Rd area; • lack of usable public space and poor quality public realm; • potential reduction in footfall due to closure of Western Infirmary hospital; • lack of development 	<ul style="list-style-type: none"> • maintain an appropriate balance of retail and non-retail uses in the Byres Rd area; • support the approved Business Improvement District process (Byres Rd only); • continue to invest in the public realm as set out in the emerging

			opportunities for modern large scale retailers.	Byres Road Masterplan; <ul style="list-style-type: none"> support delivery of the Glasgow University Campus Plan for the former Western Infirmary hospital site.
Pollok	Town Centre	Retail, commercial, leisure, civic, community	<ul style="list-style-type: none"> the need to continue to develop a diversity of town centre uses; the retail element of the centre is predominantly accessed by car. 	<ul style="list-style-type: none"> develop the centre through delivery of the current outline planning consent for additional retail, employment and leisure uses; promote multi modal based access to the town centre.
Ravenscraig	Town Centre	Regeneration, retail, education, leisure, employment	<ul style="list-style-type: none"> revision of masterplan and extended timescale for delivery 	<ul style="list-style-type: none"> promote and support Ravenscraig masterplan
Shawlands	Town Centre	Retail, commercial, leisure, civic, community	<ul style="list-style-type: none"> long term erosion of its retail offer; develop the town centre as a community hub for residents. 	<ul style="list-style-type: none"> implement the Shawlands Town Centre Action Plan Spatial Strategy; seek the retail led regeneration of the Centre focussed on Shawlands Arcade.
Wishaw	Town Centre	Retail, civic, community	<ul style="list-style-type: none"> retail contraction; proximity to Ravenscraig and uncertainty over timescales; traffic congestion issues reduces the attractiveness of the town centre to users. 	<ul style="list-style-type: none"> take forward the Town Centre Framework for Wishaw and its accompanying Action Plan.

8 Consultation, Review and Monitoring

Clydeplan have an agreed Development Plan scheme³². The purpose of the Development Plan Scheme is to:

- outline the steps which Clydeplan will take in preparing the SDP for Glasgow and the Clyde Valley; and
- explain the statutory processes involved in preparing the Plan and how you can be involved in terms of accessing documents and making representations

The key remaining stages are as follows:

Strategic Development Plan stages	Key Components	Estimated Timetable
Publication of Proposed Plan, and Supplementary Environmental Report	Publication and consultation on Proposed Plan and related supporting documents including the Action Programme.	January 2016
Proposed Plan Submission	Submission of Proposed Plan to Scottish Ministers for approval.	May 2016
Examination of Proposed Plan	Any unresolved representations will be subject to an Examination conducted by an independent Reporter appointed by Scottish Ministers.	June 2016
Modification of Proposed Plan	Scottish Ministers may amend the Plan in light of the Reporters recommendations. They will publish any modifications along with their reasons for making them.	Late 2016/Early 2017
Approval and Publication of the Plan, Environmental Report and Action Programme	Once Scottish Ministers receive the Examination Report, they may approve the Plan in whole or in part (with or without modification), or reject the plan. Clydeplan will then publish the approved SDP as soon as possible after approval. The Action Programme in support of the SDP requires to be adopted and published within three months of the SDP being approved by Scottish	Spring 2017

³² http://www.clydeplan-sdpa.gov.uk/files/Development_Plan_Scheme_and_Participations_Statement_2015_16%281%29.pdf

	Ministers.	
Strategic Environmental Assessment Post Adoption Statement	This details how environmental considerations have been integrated into the SDP.	Spring 2017

Responses from consultees will be taken forward into the plan preparation process as identified in the development plan scheme.

Appendix A Local Authority derived Strategic Centre data

Floorspace break down by Use Class (as % of total)³³

Strategic Centres	Floorspace break down by Use Class (as % of total)										
	Use Class 1/Sqm	Use Class 2/Sqm	Use Class 3/Sqm	Use Class 4/Sqm	Use Class 5	Use Class 7	Use Class 8	Use Class 10/Sqm	Use Class 11/Sqm	Use Class Sui Generis/Sqm	Vacancy rates
Glasgow City Centre ³⁴	52%	9%	14%	n/a	n/a	n/a	n/a	n/a	2%	11%	12%
Airdrie ³⁵	40%	19%	3%	12%	n/a	n/a	n/a	n/a	2%	10%	14%
Barrhead ³⁶	48%	20%	3%	11%	n/a	n/a	n/a	5%	1%	7%	5%
Braehead ³⁷	47%	1%	10%	9%	n/a	3%	n/a	n/a	26%	n/a	4%
Clydebank ³⁸	83%	7%	3%	n/a	n/a	n/a	n/a	n/a	1%	2%	5%
Coatbridge ³⁹	33%	16%	3%	17%	n/a	n/a	n/a	n/a	2%	8%	21%
Cumbernauld ⁴⁰	44%	11%	4%	15%	n/a	n/a	n/a	n/a	2%	5%	19%
Dumbarton ⁴¹	49%	22%	1%	n/a	n/a	n/a	n/a	1%	2%	9%	16%

³³ Please note all the figures have been rounded so some may not be exactly 100%

³⁴ 2013 Data - Please note that Use class 4 are not collected within the survey. The data reflects the number of units in the locations, not floorspace

³⁵ 2015 data

³⁶ 2015 data

³⁷ 2015 data – Class 3 includes Sui Generis (Food and Drink) & Class 11 includes Sui Generis Leisure. The vacancy rate is only for Use Class 1 & 3 Units

³⁸ 2015 data. The leisure floor space for WDC is not complete as the assessors don't provide this information.

³⁹ 2015 data

⁴⁰ 2015 data

⁴¹ 2015 Data. The leisure floor space for WDC is not complete as the assessors don't have this information.

East Kilbride ⁴²	58%	10%	16%	n/a	n/a	n/a	n/a	n/a	n/a	1%	15%
Easterhouse ⁴³	64%	8%	6%	n/a	n/a	n/a	n/a	n/a	n/a	5%	17%
Greenock ⁴⁴	48%	11%	2%	15%	2%	0%	0%	1%	6%	3%	12%
Hamilton ⁴⁵	61%	24%	7%	1%	n/a	n/a	n/a	n/a	0%	3%	4%
Kirkintilloch ⁴⁶	70%	15%	4%	1%	<1%	<1%	n/a	<1%	n/a	5%	5%
Lanark ⁴⁷	62%	24%	6%	1%	n/a	n/a	n/a	n/a	n/a	2%	5%
Motherwell ⁴⁸	32%	17%	4%	25%	n/a	n/a	n/a	n/a	1%	8%	13%
Newton Mearns ⁴⁹	75%	8%	3%	4%	n/a	n/a	n/a	5%	n/a	1%	4%
Paisley ⁵⁰	51%	12%	12%	2%	n/a	n/a	n/a	1%	2%	n/a	20%
Parkhead ⁵¹	61%	11%	4%	n/a	n/a	n/a	n/a	n/a	n/a	7%	17%
Partick / Byres Road ⁵²	58%	16%	9%	n/a	n/a	n/a	n/a	n/a	n/a	10%	16%

⁴² 2013 data

⁴³ 2013 data. Please note that 2013 is the first year that the Sandwick Centre is included in the annual survey of Easterhouse. Please note that Use class 4 are not collected within the survey. The data reflects the number of units in the locations, not floorspace

⁴⁴ 2015 data

⁴⁵ 2013 data

⁴⁶ 2013 data

⁴⁷ 2013 data

⁴⁸ 2015 data

⁴⁹ 2015 data

⁵⁰ 2014 data. The floorspace is based on a ground floor commercial survey so it doesn't currently include the upper floors and the range of uses including the museum, university, residential etc. Class 3 includes Sui Generis (Food and Drink) & Class 11 includes Sui Generis Leisure. The vacancy rate is only for Use Class 1 & 3 Units

⁵¹ 2013 Data - Please not that Use class 4 are not collected within the survey. The data reflects the number of units in the locations, not floorspace

⁵² 2013 Data - Please not that Use class 4 are not collected within the survey. The data reflects the number of units in the locations, not floorspace

Pollok ⁵³	80%	1%	14%	n/a	5%						
Ravenscraig ⁵⁴	n/a										
Shawlands ⁵⁵	53%	21%	10%	n/a	n/a	n/a	n/a	n/a	n/a	6%	10%
Wishaw ⁵⁶	39%	21%	4%	6%	n/a	n/a	n/a	n/a	1%	9%	20%
Scotland											14% ⁵⁷

It should be noted that despite there being limited consistency in how each Authority undertakes their survey and analysis there is a consistent approach at Local Authority level which means that there is consistency at a specific centre level.

⁵³ 2013 Data - Please note that Use class 4 are not collected within the survey. The data reflects the number of units in the locations, not floorspace

⁵⁴ Limited development on site at this present time

⁵⁵ 2013 Data - Please note that Use class 4 are not collected within the survey. The data reflects the number of units in the locations, not floorspace

⁵⁶ 2015 data

⁵⁷ <https://www.gva.co.uk/%2Fscotland/%2Fscottish-town-centres-september-2015&usq=AFQjCNEuhU28ZrOuKknc7sbAzi2lv6oNAg&cad=rja>

Strategic Application trends in the network of strategic centres⁵⁸

Strategic Centres	Strategic planning application trends 2010 -15
Glasgow City Centre	<p>The city centre has continued to attract large scale retail proposals during the period. There have been a significant number of changes of use from Class 1 to other uses (particularly class 3 Use). These have been focussed outside the principal retail area where the planning policy is less restrictive. There have also been changes of use from class 1 within the PRA. Nevertheless, in general the need to maintain class 1 in the Primary Retail Streets has been maintained although there have been some changes of use there – mainly to bank uses.</p>
Airdrie	<p>Over the period there have been a number of significant proposals that have come on stream within Airdrie town centre, notably the construction of the new £28 million Airdrie Community Health Centre following the demolition of the former Council offices at Graham Street. This project brings together a range of primary care and other community based services and will serve around 50,000 patients. The 4 storey development of over 7,400sqm includes significant new ground floor retail floorspace (now occupied by B&M Bargains).</p> <p>Other key developments have included the redevelopment of the former church at One Wellwynd into a new office development on the eastern side of the town centre as well as the construction of a new 1,621sm Aldi Store and associated car parking, north of High Street. Other proposals that have been implemented north of High Street include a new Tesco Express, a petrol station and 4 new retail units. More recently Aldi have occupied their previously vacant unit at Manse Place and now have two shops operating within the centre.</p> <p>Redevelopment of the former Bingo Hall Building on Hallcraig Street has been completed and plans have been submitted to redevelopment the former Orr’s Department store on South Bridge Street, although this has not yet been implemented and the property remains vacant.</p>
Barrhead	<p>The most recent strategic scale planning application was centred around the Main Street in Barrhead. The ASDA store has been constructed and opened for business at the end of 2014. The ASDA development complements urban realm enhancement which is part of the adjacent recently completed extension to Barrhead Sports Centre hub facility rebranded as the ‘Barrhead Foundry’. This hub facility incorporates a library, cafe, sports improvements together with a conference suite for business meetings. A new major Health Centre recently completed on the Main Street is also in close proximity. Consequently there has been tangible progress in improving both the urban realm and the retail offer in the Town Centre.</p> <p>Out with the Town Centre there are a number of complementary master plan areas included within the Local Development Plan. In particular the Barrhead South area is likely to include a neighbourhood scale retail element and a variety of employment generating uses including high tech businesses. In addition the Glasgow Road, Master plan area will</p>

⁵⁸ See Additional Supporting Material Background Report 5 - www.clydeplan-sdpa.gov.uk/proposedplan2016 - for further analysis

	include the concentration of employment generating uses, including a limited element of commercial opportunities to assist with the creation of a dynamic and competitive local economy.
Braehead	<p>A planning application has been submitted which seeks consent for a masterplan which if approved would deliver 41,000 m2 retail floorspace, 3,100m2 financial/professional and/or new food and drink floorspace, a 200-bed hotel, a 5,000 seat events arena, together with a new civic square and integrated transport hub. There has been 9 other planning applications approved within the Strategic Centre since 2012, these have involved changes of use to create new food and drink units and minor alterations to existing buildings within the centre.</p> <p>While the amount of planning applications submitted within Braehead is relatively low this does not give a true reflection of development activity within the centre as most activity did not require planning permission. £12,8m of capital expenditure has been invested in enhancing the centre between 2010-14 which includes - Next unit refurbishment, food court/dining area refurbishment and a new Krispy Kreme store and factory locating in the former Maritime Museum. The amount of vacant floorspace has reduced by 2,000 sqm since 2013 and the amount of vacant units has also fallen from 20 to 16 during the same period. The Titanium Business Park has continued to develop in recent years with much of the available floorspace now being let. It is anticipated that the proposed central public transport interchange would help to market the remaining vacant floorspace within the business park.</p>
Clydebank	<p>There has been interest in change of use from Class 1 to Class 2 uses, particularly in the southern mall area. This area sits within the retail core where the Council is keen to retain retail Class 1 uses.</p> <p>There has been interest in edge of centre development with a new leisure centre granted consent at Queens Quay (development now underway) and a further permission in principle is currently being sought (Nov 2015) for residential and mixed use development for the remainder of the Queens Quay site. No detailed application has been received for development at the Playdrome site.</p>
Coatbridge	<p>Over the period there have been a number of significant proposals that have come on stream within Coatbridge town centre, notably the construction of the £18 million Buchanan Centre, a joint venture between NHS Lanarkshire and North Lanarkshire Council. The centre is a focus for a range of health and community services including a Health Centre, Library, First Stop Shop, Local Area Registration Office and a public square. The 5,264 sqm building was constructed on the site of the former swimming baths at Main Street.</p> <p>Other key improvements have included the installation of new street paving, furniture, and signage around the town centre. Within Faraday Retail Park the redevelopment of 4 new retail units totalling 4,099sqm has been implemented, with new operators including Outfit, JD Sports, Currys PC World and Mothercare. In addition M&S Food have occupied a vacant unit within the Retail Park.</p> <p>There are still significant opportunities within and around the town centre including the former library on Academy Street, the reuse or redevelopment of the former government office on Muirhall Street, and</p>

	<p>the reinvigoration of the western end of Main Street. Clyde Valley Housing Association has submitted an application to convert the former Library to form 12 Flats and this is currently being considered by the Council.</p>
<p>Cumbernauld</p>	<p>Following the opening of the 35,000 sqm Antonine Centre in 2007, planning application activity within the town centre has been limited to a number of changes of use applications and proposals for minor alterations within the various phases of the Town Centre. However, a number of key developments are notable, including the redevelopment of the 4,436 sqm former B&Q unit at St. Mungo's Road at the western side of Cumbernauld town centre by B&M Home Store (this unit had lain vacant since 2005).</p> <p>The Centre has also benefited from significant public realm, signage and access improvements including the construction of a new £1.2 million replacement footbridge in 2012 funded by Campsies Centre (Cumbernauld) Ltd. This crosses over Central Way and connects the Cumbernauld Shopping Centre with the Antonine Centre. A town centre partnership including the Council and town centre owners have improved sites within the centre by planting trees, removing overhanging bushes around footpaths, and providing new railings and handrails.</p> <p>The part of the Town Centre known as the Cumbernauld Centre was purchased by Belgate Estates (June 2013) in a joint venture with Hamilton Capital Partners. Following a major redistribution of tenants to concentrate footfall on key frontages, a number of asset management initiatives are being explored to make the centre more attractive to users and investors.</p> <p>Further scope to improve the overall attractiveness of the centre exists, with plans approved to redevelop the 2,812 sqm former Ice House at the western part of the centre to create an indoor skate park (this building has lain vacant since 2005). Work is also ongoing to create a Worship Centre & Social Enterprise Life Centre in an adjacent unit. Planning permission has also been secured to construct a new restaurant at the site of the former Esso filling station on Central Way.</p> <p>The construction of a new £8 million Cumbernauld Community Enterprise Centre (incorporating Class 2 offices) with associated parking, landscaped public open space, pedestrian / cycle paths and a new play area is nearing completion. This 7,000 sqm facility represents major investment by NLC, Scottish Government, through the Regeneration Capital Grant Fund, and Campsies Centre Cumbernauld.</p> <p>Cumbernauld would appear to have been hit hard by the economic downturn with the loss of national multiples proving difficult to replace and the availability of a range of new units proving difficult to let. Management of the shopping mall is fragmented with no overarching vision for the mall. That said the town centre has been able to attract public funding for the footbridge and other street works, while private sector investment has been noted in the form of new signage and car park resurfacing.</p> <p>Longer term, the recent announcement of the closure of the HMRC tax</p>

	<p>office (by 2025), will have significant implications for the future planning of the centre given that it occupies a very large site within the western side of the centre, and employs over 1,000 staff who will no longer make use of the centres services and facilities.</p>
Dumbarton	<p>There has been little in the way of significant retail applications in the town centre. The period 2010-2015 has seen interest in some change of use from Class 1 within the town centre. More recently this has included change of use to an estate agent, a coffee shop and a housing association office. Some of which have been within the retail core, an area where the Council is keen to retain Class 1 uses.</p> <p>An application was approved for refurbishment of the Artizan Centre, an area which is high in vacancies.</p> <p>There has been retail interest on a vacant site in the adjacent retail park, consent was granted for reconfiguration of the units, no development has taken place.</p>
East Kilbride	<p>Over the whole of East Kilbride there has been high activity with retail in particular supermarket proposals. Between 2010-2015 there were three supermarket proposals for East Kilbride two out of centre and one edge of centre. Within the strategic centre an application was approved for an extension and reconfiguration of part of the East Kilbride Town Centre – shopping mall. 16 applications for change of use within the town centre have kept units in use.</p> <p>The main trends in East Kilbride Town Centre have saw retail units change to office, restaurant/bar uses. Overall there has been minimal change of uses over this period.</p>
Easterhouse	<p>The Fort has undergone significant and continuing expansion to both its retail and leisure offer since 2012. The city plan aspiration for improvement to the rest of the town centre has proved more difficult to achieve. Full planning permission at 20 Auchinlea Way Easterhouse Erection of retail units 2,788 GC on 16/04/15. This consists of 4 new units @ 697sqm. At Glasgow Fort the completion of a 16,298 sqm development of retail with a Marks and Spencer Department Store acting as anchor.</p>
Greenock	<p>There has been a general trend of changing use from class 1 to 2 and 3 (offices and betting offices/financial), although more recently there has been some change from other uses to Class 1, as well as Classes 2 and 3.</p> <p>There are other retail proposals as part of the redevelopment of both the Victoria and East India Harbours in Greenock and the Inverkip Power Station, but they should be smaller scale/ancillary development that will be confirmed as detailed applications come forward. One retail unit related to the marina at James Watt Dock is complete.</p> <p>There is limited scope for new retail/commercial development within Greenock town centre. The Former Scott Lithgow/East Glen Yards in Port Glasgow were identified in the SDP as providing an opportunity for strategic scale retail/commercial development (Tesco opened 2008 on part of site, B&Q, Costa and a Marston's bar/restaurant opened in 2014. Work has begun on 17,924 sq m retail floorspace along with 353sq m Class 3 family restaurant, for the remainder of the site) to complement the strategic role of Greenock town centre. The site was</p>

	included in Port Glasgow town centre in the Inverclyde Local Development Plan 2014.
Hamilton	<p>In terms of planning applications within strategic centre Hamilton between 2010 – 2015, there has been high activity in relation to change of use. There have been minimal applications for new build and one application for extension to the existing Asda store to create a mezzanine level for comparison goods together with improving access and more car parking. There has also been activity in the change of occupiers in the town centre with the demise of 'Birthdays' chain creating a vacancy which gave 'Next' the opportunity to extend their unit and create a 'Next Home' store in Hamilton. Other new occupiers include Nando's and Frankie and Bennie's, Carphone Warehouse.</p> <p>The main trends have been a number of units in Hamilton Town Centre changing from Class 1 retailing to Class 2 office/ service use, with a few changing to Class 3 restaurant or cafes. There have also been changes from Class 1 to Hot Food. In terms of the reverse, there has been no change of Class 2 to Class 1 and a few changes from Class 2 to restaurants/café's and for resident use. The 'other use class' figures mainly relate to change of use of outdoor area to create extensions for eating and drinking. There is also a high number of use classes changed to 'other' which the majority are for change of use of retail or office to flatted properties.</p>
Kirkintilloch	<p>The lack of activity since 2010 makes it difficult to identify any clear development trend. There has been no significant retail applications within the town centre, with most activity coming in the form of lower value 'pop-up' type shops, and food and drink establishments. The only significant retail application that has come forward relates to a site just outwith the town centre boundary. This was for a Lidl store, with work having commenced in the summer of 2013. Such a lack of activity is not unexpected and perhaps reflects broader trends whereby lower cost food retailers and service sector businesses are proving more viable in the current economic climate. We will monitor this trend closely in the coming years, and it is hoped that the implementation of the Kirkintilloch Masterplan will help to encourage a greater level of investment across all sectors.</p>
Lanark	<p>In terms of planning applications within strategic centre Lanark between 2010 – 2015, there has been high activity in relation to change of use and alterations to shop fronts and reconfiguration. There have been two applications for extensions to buildings within the town centre. These were for an extension to a public house and a nursing home. There has also been activity in the change of occupiers in the town centre with the demise of 'Woolworths' creating a change of the occupier to 'Poundland'.</p> <p>The main trends have been a number of units in Lanark Town Centre changing from Class 1 retailing to Class 2 office/ service use, with a few other units changing to Class 2 also. In terms of the reverse, there has been no change of Class 2 to Class 1 and one change from Class 2 to restaurants/café's and for resident use. The 'other use class' figures mainly relate to change of use of outdoor area to create extensions for eating and drinking.</p>
Motherwell	<p>Over the period there have been a number of significant changes that have impacted upon Motherwell town centre, notably the pedestrianisation of Merry Street and re-organisation of traffic flow into</p>

	<p>a one-way system. Following the completion of streetscape works in Muir Street and around Motherwell train station, North Lanarkshire Council are continuing with a programme to improve the quality and appearance of the town centre streets and public spaces with works underway in West Hamilton Street and Coursington Road.</p> <p>Other key developments have included the completion of significant new quality office space at the Dalziel Building, Scott Street at the north east end of the town centre and the construction of a new 1,419sm Aldi store on Mason Street following the demolition of the former Dalziel Workspace. Merchant homes have also completed a 31 home flatted development close to this site. New residential development is also under construction at Glencairn Street, adjacent to the town centre, where North Lanarkshire Council are providing 25 new dwellings on the site of the former Glencairn Tower Block. A new fast food outlet has also been completed within the main town centre car park</p> <p>Strathclyde Passenger Transport (SPT) has created additional parking spaces for commuters at St Vincent Place (60 spaces) and at Farm Street (126 spaces). These £750,000 facilities have been funded by SPT, with the council providing the land and maintaining the car parks.</p> <p>While opportunities remain within the centre to reuse parts of the former Asda building on the main pedestrian thoroughfare of Brandon Parade, there are a number of key development sites in and around the centre, including the site of the former council offices at Brandon Street, the former DSS Office site on West Hamilton Street, and the re-use of the former council offices at Merry Street.</p> <p>Motherwell would appear to have received a reasonable amount of investment over the period. The shopping arcade has recently undergone a rebranding and Merry Street has received investment in street furniture, artworks and paving.</p>
<p>Newton Mearns</p>	<p>The expansion proposals for the Avenue received planning consent in 2010 but have not been implemented. There is evidence that some of the previously vacated units, adjacent to the expansion site, within the older section of the centre are now the subject of recent planning consents for refurbishment with bespoke businesses beginning to re-establish.</p> <p>Out with the Newton Mearns Strategic Centre, the Greenlaw Neighbourhood Centre is extensively complete; the last phase of the Greenlaw Neighbourhood Centre has been completed with the erection of 2 retail units within a co-joined non-food retail development with approximately (1861sqm) of floor area. The Neighbourhood Centre currently comprises of a range of retail units, including Waitrose referred to above. Additionally a hotel and special needs school have been built adjacent to this Neighbourhood Centre.</p> <p>Out with the Strategic Newton Mearns Town Centre there are a number of complementary master plan areas within the Proposed Local Development Plan. In particular the Malletsheugh/Maidenhill, Master plan area is likely to include a Neighbourhood scale retail element and a variety of employment generating uses including high tech businesses.</p>

<p>Paisley</p>	<p>Since 2012 more than 100 planning applications have been submitted for development proposals within the Town Centre. Most applications have been for changes of use, particularly involving the creation of new service and food & drink uses, and alterations to existing buildings. In the last 5 years there has been an increase in the amount of residential development boosting the amount of people living within the town centre. This includes the re-development of the former Council HQ site, the residential led redevelopment of the former Arnotts site, and the creation of over 300 student flats. Another significant development that has been approved planning permission will occupy vacant office space within the town centre creating a new hotel with ancillary bar/brasserie, event space, microbrewery and business centre.</p> <p>There has been little commercial development activity at the edge of Paisley town centre in recent years other than extensions/subdivision of existing units and changes of use. Tesco are no longer going to proceed with their development which would have seen the redevelopment of a large brownfield site at the edge of the town centre. This vacant site presents an opportunity for a mixed use development benefiting from its close proximity to the town centre. A Proposal of Application Notice has been submitted (November 2015) for the re-development of this site which is for the erection of class 1 retail and class 3 restaurant units with drive through facility, public house, class 8 and 9 residential/nursing home and flats with ancillary works.</p> <p>It is envisaged that City Deal investment will enhance the development potential of the corridor which extends from the town centre north to Glasgow Airport.</p>
<p>Parkhead</p>	<p>Recent developments have been focussed in the area surrounding the town centre including the reconfiguration of the Retail Park to incorporate a major supermarket. There is also a mixed use consent in the wider area at Springfield Road adjacent to the Velodrome that includes a hotel, medical centre and 3000sqm of Retail floorspace. This has yet to be implemented. Since 2012 there has been limited activity with the focus being on the variation of existing consents to extend range of convenience.</p>
<p>Partick / Byres Road</p>	<p>The City Plan has a threshold of 20% non-class 1 use in the Principal Retail Areas (PRAs) above which changes of use from class 1 are not encouraged. As of September 2012 neither Byre Rd nor Partick PRA met this target. Nevertheless the balance between class 1 and non-class 1 use has remained stable in both with a slight increase in non-class 1 in Byres Road PRA and a slight increase in Class 1 use in Partick PRA. This relative stability has in part been maintained by refusing applications for non-class 1 where they do not meet the policy requirement. Vacancies have remained consistently low.</p> <p>It is significant that restrictions on the level of non-class 1 have not resulted in a higher level of vacancy in either PRA since this indicates that they both remain attractive to class 1 operators. Nevertheless in Byres Road PRA in recent years there have been a few units that have become vacant and not been re-let including the former Roots and Fruits unit near Waitrose and the Heart Buchanan unit across the road. The precise cause is unclear but may be attributable to high rental levels rather than the centre's inherent lack of attractiveness. Since 2012 there has been limited non-strategic activity in relation to splitting</p>

	consents in relation to class 1 and 2 uses.
Pollok	Pollok's strategic status was enhanced by the creation of the Silverburn Mall in 2008. In addition to the mall's retail and leisure offer the centre has also undergone a £6m Civic Realm project accommodating public and community uses mainly serving the local Pollok area including a library, museum and crèche adjacent to the civic realm area there is also a swimming pool and health centre. An application for further retail and leisure floorspace 33,500 Class 1 and 8,500 Class 11 has been approved by the Council in 2015 and now has consent.
Ravenscraig	<p>Significant progress has been made on the Ravenscraig site with over £200 million spent since 2006, including major roads infrastructure, decontamination works, delivery of a major regional sports facility immediately north of the proposed town centre, and a state of the art campus for New College Lanarkshire to the west. Adjacent residential development has been ongoing since 2010 involving a number of volume builders who have constructing over 240 homes for sale and for social rented for North Lanarkshire Council and Clyde Valley Housing Association.</p> <p>In addition, the BRE Innovation Centre located to the north of the proposed town centre, trials and tests innovative building technologies before they are applied to real communities, and acts as an exemplar for sustainable planning and development at this location. The area earmarked for the town centre is surrounded by significant opportunities for a range of supporting and complementary land uses, with land around the site having potential to accommodate up to 216,000 sqm of business and industrial space.</p> <p>In February 2011 North Lanarkshire Council submitted a £73 million funding proposal to kick-start the Ravenscraig development under a scheme known as Tax Incremental Financing (TIF). As part of the TIF process North Lanarkshire Council has proposals in place to upgrade the A723 between Holytown and Carfin. This is effectively the northern access into the Ravenscraig site, linking it to the M8 motorway at Newhouse and helping to facilitate future stages of development. Some of the works, including the construction of a new bridge under the railway, and a new roundabout to access new housing development off the road, have now been completed, although significant land acquisition along the line of the A723 is required for road widening for which a CPO is being progressed.</p> <p>The current review of the Master Plan seeks to take account of current developer appetite, market conditions and changing lifestyle patterns to ensure that planned proposals remain attractive and sustainable. It is likely that this will involve further high quality housing and an element of retail albeit there is some uncertainty over its likely scale and format. Notwithstanding this there remains considerable flexibility to accommodate a range of options on site with planning consent already in place for 84,000 sqm of retail, leisure and associated types of development.</p>
Shawlands	In the Principal Retail Area (PRA) the proportion of non-class 1 units is 16% which is within the City Plan policy threshold of 20%. However the level of operating class1 units is well below 80% at 58% and has remained around this level since 2002. Therefore the restriction on

	<p>non-class 1 units has not produced a high level of class 1. Instead there is a high vacancy rate in the PRA (26% compared with 9% in the centre as a whole). Indeed there are more vacant units than non-class 1 units in the PRA. This may indicate that the restriction on non-class 1 is contributing to units lying vacant. The level of vacancies in the PRA has been persistently high since 2002. There are likely to be a number of reasons for this including the requirements of modern day retailers and competition from other locations. The vacancy issue in the PRA cannot therefore be simply attributed to planning restrictions.</p> <p>In the Secondary Retail area the proportion of Class 1 use has remained around 50% since 2002. There was a slight increase in non-class 1 units between 2002 and '08 however the level has been stable since then. Therefore there is no evidence that the SRA is struggling to maintain its level of class 1 or is under pressure from non-class 1. Indeed the number of new non-class 1 units since 2002 is the same as the fall in vacant units over the period pointing to more diverse centre with higher occupancy.</p>
Wishaw	<p>With regard to new development proposals a number of key projects have been completed, including the construction of the new £23 million Houldsworth Centre at the site of the former library at Kenilworth Avenue. The proposed 7,800 sqm community hub will replace the existing health centre, library, First-Stop-Shop and Housing Department on one campus, and is being taken forward as a joint project between NHS Lanarkshire and North Lanarkshire Council.</p> <p>Extensive development opportunities also exist within the town centre including the redevelopment of the former Tesco site on Main Street, the redevelopment of the former school site at East Academy Street, and development opportunities related to the former Wishaw Market site to the south of the town centre.</p> <p>Wishaw would appear to have found the economic downturn challenging. While public sector investment has delivered significant new development, private sector investment has been limited. Proximity to Ravenscraig and uncertainty over timescales for the development of the new town centre has also undermined Wishaw's ability to attract new investment and to establish a role that would complement any future centre at Ravenscraig.</p>

The Strategic Centre Profiles for each of the strategic centre can be downloaded from here⁵⁹

⁵⁹ See Additional Supporting Material Background Report 5 - www.clydeplan-sdpa.gov.uk/proposedplan2016

Appendix B National Survey of Local Shopping Patterns (2012) Comparison retail data analysis

Introduction to NSLSP dataset

The National Survey of Local Shopping Patterns (NSLSP) provides catchment information based on a sampled household survey and not based on any modelling. The survey is undertaken annually and identifies how the market shares achieved by individual shopping locations change over time. NSLSP results are founded solely on where households actually report shopping. Results are available separately for comparison, bulky and grocery goods. This particular analysis looks solely at comparison goods.

Catchment areas are identified by allocating every zone (output area, postal sector, postal district or whatever cell geography is adopted), where one or more households report the named trading location as their primary destination for comparison, convenience or bulky goods shopping purposes. For this analysis, postal sectors were used

NSLSP catchments are self-forming and identify where a trading location's shoppers actually come from. The survey results are based on primary shopping destination questions and thus identify the relative attraction of trading locations to local consumers for main shopping purposes. This allows an estimate on the spending available to individual trading locations by domestic shoppers on primary shopping trips to be derived by grossing up per capita averages.

The dataset evolves over time as identified shopping populations change. That means that the dataset is not comparing like for like shopping populations as these have altered to reflect changing shopping patterns.

Throughout the report a number of terms are used. These are as follows:

- Full catchment shopping population – This is the sum of the full postcode population of a particular centre. This is derived from the current and historical surveys' output of the postal sectors from which shoppers have stated that they currently or have used previously a particular centre as their main comparison shopping location. So this creates a potential catchment population by aggregating the full postal sector populations for a centre based on the current and historical surveys' output. For example, if a shopper in 2008 stated that they used a particular centre then that total postal sector population is used to create the full catchment population regardless of whether that person uses that centre in 2012 or not.
- Shopper population - The shopper population for each centre is derived from the number of people sampled from the full catchment population who named that centre as their main comparison shopping destination.
- Spend potential - Spend potential is calculated by applying per capita expenditure for each postal sector to shopper population⁶⁰.

This paper sets out the outputs of the analysis undertaken for the Glasgow and the Clyde Valley (GCV) city region using the 2012 NSLSP comparison dataset and identifies the current position across the Strategic Development Plan (SDP) network of strategic centres and the change that has occurred in those centres since 2008.

⁶⁰ Please note that the NSLSP dataset identifies comparison shopping expenditure only. It does not include elements such as visitor economy spend etc. This is important as elements such as the visitor economy spend could be a significant factor for some strategic centres

Total GCV Shopper population and comparison spend potential

All of the figures in this report show the full shopper populations unless stated otherwise.

For the GCV, total shopping population is 1.74 million within the full catchment for the city region. This represents 1.54 million from within the GCV area and 0.199 million from out with the GCV area. The comparison spend potential for the city region is some £4,204 Billion. This constitutes £3,69Bn from within the GCV area and 0.5Bn from out with the GCV area. This is shown below in Table 1 below.

Table 1 Shopper population and comparison spend potential (2008-2012)

	2008	2012	Change 2008-12	Change 2008-12 (%)
GCV Shopper Population (Mn)	1,717,454	1,744,342	26,888	+1.6
GCV Spend Potential (£Bn)	3,993.39	4,204.56	211.17	+5.3

Since 2008 there has been an increase of 26,888 shoppers (1.6% increase in the shopping population) in the GCV city region. This rise in the shopper population has been accompanied by an increase of £211mn in the spend potential at the GCV area since 2008. This represents an increase of 5.3% overall and seems to suggest that the strategic centres in the GCV area have been able to generate more expenditure per shopper than in 2008.

GCV Strategic Centres – 2008 and 2012 comparison spend potential

Table 2 below sets out the change that has occurred in the comparison spend potential of the strategic centres since 2008.

The totals for the GCV network of 23 strategic centres show that they have a £4,022.57Mn potential spend in the city region and this is a 2.5% increase in the total of the £3,924.13Mn in 2008.

Table 2 GCV Strategic Centres – 2008 and 2012 comparison spend potential

Comparison Goods Spend Potential (£Bn) (2008/2012 change)				
	2012	2008	Change	% Change
GVC Strategic Centres (Total)	4,022.57	3,924.13	+98.44	+2.5%
GLASGOW CITY CENTRE	2,052.60	2,154.35	-101.76	-4.7%
BRAEHEAD⁶¹	424.23	428.30	-4.07	-0.9%
EAST KILBRIDE	263.80	329.54	-65.74	-19.9%
POLLOK	256.48	91.18	+165.30	+181.3%
HAMILTON	203.52	173.19	+30.33	+17.5%
CLYDEBANK	157.66	138.77	+18.89	+13.6%
GREENOCK	125.75	122.00	+3.75	+3.1%
EASTERHOUSE	83.53	72.83	+10.70	+14.7%
PAISLEY	80.26	87.40	-7.14	-8.2%
MOTHERWELL	77.24	76.68	+0.56	+0.7%
PARKHEAD	68.83	56.13	+12.70	+22.6%
CUMBERNAULD	56.67	46.00	+10.67	+23.2%
COATBRIDGE	55.04	38.85	+16.19	+41.7%
NEWTON MEARNS	23.18	17.00	+6.18	+36.3%
LANARK	22.35	18.91	+3.45	+18.2%
WISHAW	20.52	18.41	+2.10	+11.4%
AIRDRIE	19.89	20.76	-0.87	-4.2%
DUMBARTON	14.87	16.99	-2.12	-12.5%
KIRKINTILLOCH	10.09	10.55	-0.45	-4.3%
SHAWLANDS	2.84	2.68	+0.16	+5.9%
PARTICK	2.24	2.04	+0.20	+9.8%
BARRHEAD	0.98	1.56	-0.58	-37.0%

City centre

The key issue is the reduction, by almost 5% (£101Mn), in the city centre comparison spend potential over the period. Whilst the city centre's expenditure potential continues to dominate that of the other centres (see Figure 1), the reduction would appear to reflect the draw of new or expanded retail locations that have come on stream in recent years and the resulting change to shopping patterns. Despite these changes the city centre remains the dominant centre in the city region and beyond and attracts in additional spend from a range of sources, including the visitor economy.

The remaining Strategic Centres

The three large mall-based centres, Braehead, East Kilbride and Pollok, had a spend potential greater than £250m at 2012, and are the main comparison retail centres alongside Glasgow City Centre. These centres are relatively modern in their configuration, and host a range of national multiples.

⁶¹ Please note the all NSLSP data for Braehead relates to both the town centre and the adjoining commercial centre.

Braehead, despite its position as the second largest retailing destination in the city region, by shopper population and spend potential, has seen a small decrease since 2008, in its expenditure potential and this perhaps reflects an increased like-for-like competition from Pollok, Easterhouse, improvements to the initial range of comparison offers, a new leisure complex, and the maturing of this centre as shopping patterns become established. Despite a loss of 0.9% it would appear that Braehead has performed relatively well (although vacancies remain an issue) in this period, given the fact that Silverburn is maturing, and the impact that it is having on other centres and given the performance of both Glasgow City Centre and East Kilbride, which have experienced more significant changes.

East Kilbride has suffered a reduction of around 20% (or over £65m) in its expenditure since 2008, reflecting both the impact of Pollok maturing, and the amenity of the older parts of the centre.

The increase of 181% in spend potential at Pollok since 2008 reflects the fact that the Silverburn mall opened in stages from late 2007, and therefore that full trading performance was not captured in the data. This increase is the largest of any strategic centres over that period and demonstrates that it is maturing as a comparison retail destination and that the development that has taken place at the location is attracting shoppers and expenditure.

In terms of centres with spending potential of between £50m and £250m, almost all have shown a growth in spend potential between 2008 and 2012. These centres are a mix of traditional centres with more recent additions, such as Coatbridge, Greenock, Motherwell, Parkhead and Hamilton, and those based on more modern formats, such as at Clydebank, Easterhouse and Cumbernauld. The exception to the overall growth trend is Paisley which has seen a reduction of £7.14m (or 8.2%), and this is likely to be attributed to the influence of Braehead, and more recently, Pollok.

The remaining centres in the network, with spend potential of up to £25m, are essentially serving local catchments. Of the nine centres in this category, four (namely Airdrie, Dumbarton, Kirkintilloch and Barrhead) have suffered a decline in spend potential ranging from 4.2% to 37%. The proximity of these centres to larger centres or centres with recent investment, such as Glasgow City Centre, Braehead, Clydebank and Easterhouse may explain this reduction. Of the remainder, Wishaw and Lanark have experienced an increase in their spend potential, likely benefiting from their location on the south-eastern periphery of the GCV area, with lower levels of competition from major centres. Newton Mearns has seen a 36.3% increase in its spend potential, presumably benefiting from the relative affluence of its shopper population (and a 45% increase in its shopper population). Shawlands and Partick have shown improvements in spend potential since 2008, albeit from relatively low levels of £2.04m and £1.56m respectively.

Shopper population change in Strategic Centres between 2002-2012 including:

Table 3 Shopper population change in Strategic Centres between 2002-2012

	Shopper population by date			Change in shopper population over time					
	2002	2008	2012	Change 2002-08		Change 2008-12		Change 2002-12	
Glasgow City Centre	921,792	903,857	844,888	-17,935	-2%	-58969	-7%	-76904	-8%
Braehead	104,966	173,987	172,991	69,021	+66%	-996	-1%	68025	+65%
East Kilbride	121,114	130,036	103,494	8,922	+7%	-26542	-20%	-17620	-15%
Pollok	7,154	36,578	99,977	29,424	+411%	63399	+173%	92823	+1297%
Hamilton	82,987	73,072	84,213	-9,915	-12%	11141	+15%	1226	+1%
Clydebank	70,996	62,774	71,878	-8,222	-12%	9104	+15%	882	+1%
Greenock	62,345	54,090	54,393	-8,255	-13%	303	+1%	-7952	-13%
Easterhouse	0	31,750	38,145	31,750		6395	+20%	38145	
Parkhead	39,176	29,423	35,308	-9,753	-25%	5885	+20%	-3868	-10%
Paisley	84,230	37,790	34,887	-46,440	-55%	-2903	-8%	-49343	-59%
Motherwell	41,033	32,832	33,391	-8,201	-20%	559	+2%	-7642	-19%
Coatbridge	21,777	17,264	24,841	-4,513	-21%	7577	+44%	3064	+14%
Cumbernauld	13,834	18,426	22,453	4,592	+33%	4027	+22%	8619	+62%
Lanark	7,158	7,664	8,777	506	+7%	1113	+15%	1619	+23%
Wishaw	12,018	8,527	8,658	-3,491	-29%	-324	-4%	-3360	-28%
Airdrie	18,803	8,928	8,604	-9,875	-53%	-324	-4%	-10199	-54%
Newton Mearns	7,266	5,073	7,357	-2,193	-30%	2284	+45%	91	+1%
Dumbarton	6,610	7,608	5,932	998	+15%	-1676	-22%	-678	-10%
Kirkintilloch	7,072	3,991	3,802	-3,081	-44%	-189	-5%	-3270	-46%
Shawlands	2,765	981	1,034	-1,784	-65%	53	+5%	-1731	-63%
Partick/Byres Road	1,856	822	964	-1,034	-56%	142	+17%	-892	-48%
Barrhead	798	624	384	-174	-22%	-240	-38%	-414	-52%
Ravenscraig	0	0	0	0		0		0	

City centre

The city centre has undergone a ten year sustained reduction in its shopping population since 2002. This reduction represents 8% (76,000+ shoppers).

The remaining Strategic Centres

Of the remaining 22 centres, 12 have seen a reduction in their shopping population since 2002. Of these 12, 6 have experienced long term reductions in their shopping population over a 10 year period. These include, Airdrie, Barrhead, Kirkintilloch, Paisley and Wishaw. In some cases these centres do not represent a large shopping population but in the case of Paisley, it has seen a loss of almost 50,000 shoppers over that period. Overall, it does suggest that these centres comparison retail function has changed over that period and their previous shopper population have chosen to undertake that activity at a different location or utilising other shopping formats, including the internet.

Of the remaining 6 centres with a reducing shopper population one of the biggest impacts has been seen in East Kilbride which has experienced almost a 20% reduction (17,000 shoppers). This change was experienced solely over the 2008-12 period. This is despite the fact that it grew between 2002 and 2008, presumably when the investment in Centre West was coming on stream – opened in 2003. Dumbarton is the other centre that had a reduction in its shopping population over the 2008-2012 period. The remaining 5, Greenock, Motherwell, Parkhead, Partick/Byres Rd and Shawlands all lost shopping population over the 2002-2008 period and saw an increase in their shopping populations over the 2008-2012 period but overall still saw a reduction over the 10 year period. This does seem to suggest that these centres were being impacted on pre-recession and have stabilised post-recession.

The development at Braehead⁶², Easterhouse and Pollok over that period has led to a large increase in their respective shopper populations. Braehead has seen an increase of 65% over the period. Whilst given the existing development that was at both Pollok and Easterhouse prior to the additional development taking place and coming online it does show a large increase at Easterhouse and a massive increase at Pollok (1300%). As noted previously, the shopping population at 2002 for Pollok was for the old Pollok Centre, and the 2002 figure for Easterhouse does not include the Shandwick Centre whilst the later figures reflect the development at Glasgow Fort. Overall, these figures for these three centres demonstrate the impact of large mall-led type developments on the network and that these are locations attractive to shoppers.

Finally, Lanark and Cumbernauld have seen a large rise in their respective shopper populations (23% and 62%). For Lanark, its specific geography and 'independent' retail offer may account for this. In the case of Cumbernauld, the Antonine Centre would appear to have acted as a catalyst for increased shopper population.

It is clear from the analysis that the GCV strategic centres network contains all the strategically important comparison retail locations in the region but that, based on the size of their shopping populations, some are not primarily strategic comparison retail destinations, namely, Airdrie, Barrhead, Dumbarton, Kirkintilloch, Lanark, Partick/Byres Rd, Newton Mearns, Shawlands and Wishaw, but these are strategically important locations for other reasons.

Full catchment shopping population flows between Strategic Centres

This section sets out the proportion of the strategic centres full catchment shopping population at 2012 that is retained (i.e. the shopper population) and their relationships to the other strategic centres.

Figure 1

Figure 1 below shows the distribution of each GCV strategic centre's full catchment shopping population in terms of what is retained by a centre and the locations the remaining shopper population leaks to. It should be read from left to right across each row.

- The figures marked in bold show the proportion retained by the centre – for example Airdrie retains 3.3% of its full catchment population.

⁶² These figures show change since 2002. Please note that there has been no strategic levels of floor space development at Braehead (within the designated strategic centre boundary) since Xscape opened in 2006 – with the exception of new office pavilions.

- The horizontal rows identify where the centre on the left leaks to other centres – for example Airdrie leaks 0.6% of its full catchment population to Braehead

NOTE:

It is important to note that centres have different catchment sizes, and therefore different numbers of potential shoppers. For example, Glasgow City Centre has a large retail catchment, which means that if it leaks 1% of its full catchment population to another centre, this is a significantly higher number of potential shoppers than if a smaller centre such as Airdrie leaked 1% to another centre.

Map 2

Identifies the net number of shoppers leaked from a centre to another centre. i.e. the number of shoppers leaving centre A to centre B minus number leaked from B to A as a % of centre A (assuming A is a net loser). It does not include the city centre as given its dominance it takes shoppers from all of the other strategic centre

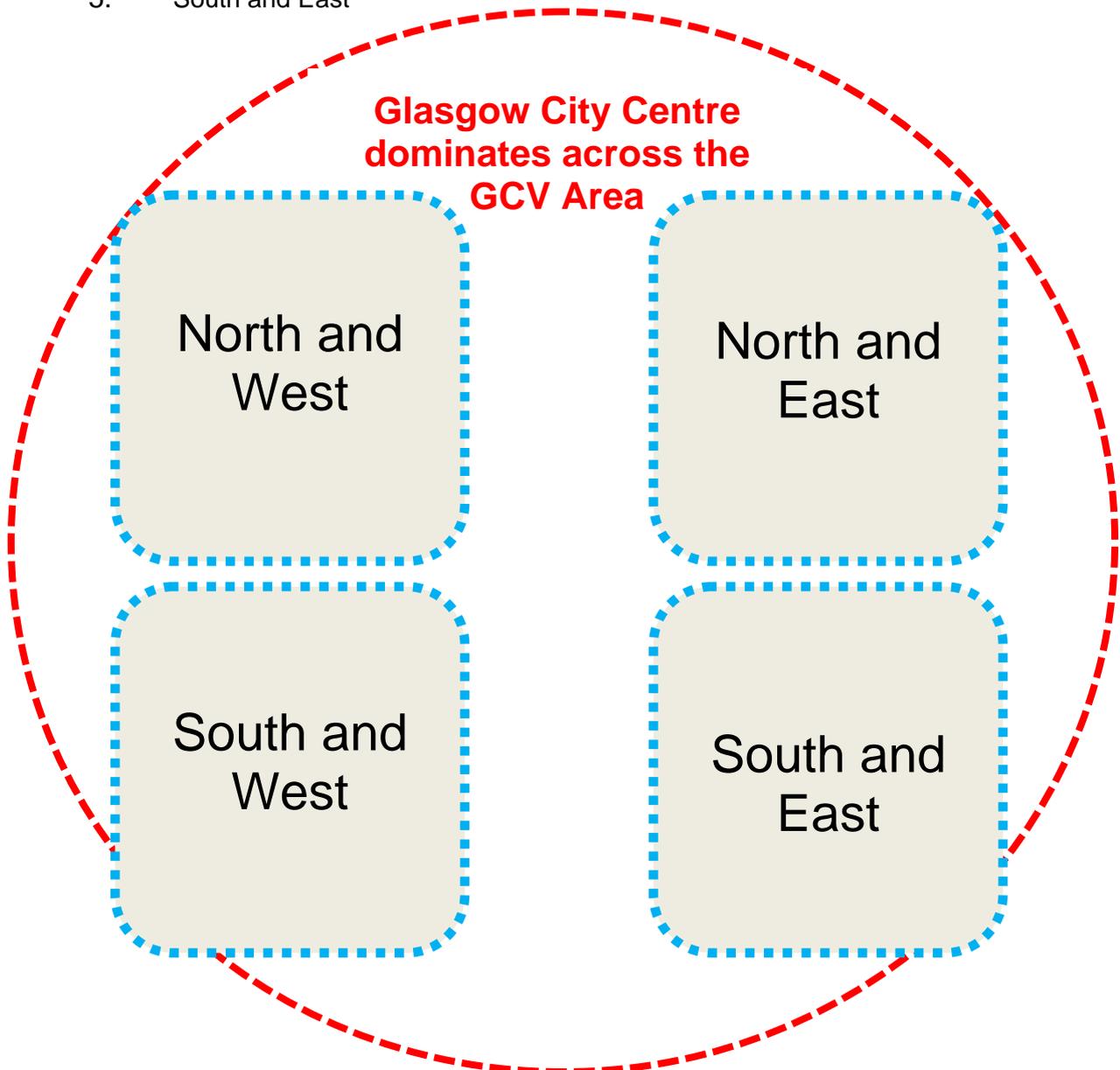
Figure 1 GCV Strategic Centres: Catchment Leakages 2012 (%) 'Full' Catchment (100% of Total Shopping Population Contribution)

	AIRDRIE	BARRHEAD	BRAEHEAD	CLYDEBANK	COATBRIDGE	CUMBERNAULD	DUMBARTON	EAST KILBRIDE	PARKHEAD	CITY CENTRE	EASTERHOUSE	GREENOCK	HAMILTON	KIRKINTILLOCH	LANARK	MOTHERWELL	NEWTON MEARNS	PAISLEY	PARTICK	SHAWLANDS	POLLOK	WISHAW	Other	Total
AIRDRIE	3.3	-	0.6	-	9.1	4.4	-	1.4	2.5	35.9	6.0	-	3.5	-	0.0	4.7	-	-	-	-	0.1	0.5	27.9	100.0
BARRHEAD	-	0.3	22.6	0.4	-	-	-	0.6	-	31.9	-	-	-	-	-	-	1.3	8.1	-	0.2	22.7	-	12.1	100.0
BRAEHEAD	0.3	0.0	6.6	2.7	0.9	0.8	0.2	3.9	1.3	30.5	1.3	2.1	3.1	0.1	0.3	1.2	0.3	1.3	0.0	0.0	3.8	0.3	38.8	100.0
CLYDEBANK	0.1	0.0	10.3	5.4	0.4	0.9	0.4	3.9	1.4	36.7	1.2	3.7	2.2	0.3	0.4	1.0	0.2	2.2	0.1	0.0	3.3	0.2	25.8	100.0
COATBRIDGE	1.8	-	1.2	0.0	5.1	3.3	-	5.1	3.6	39.8	5.6	-	6.4	0.3	0.4	4.8	-	-	-	-	0.4	0.5	21.6	100.0
CUMBERNAULD	1.9	-	0.8	0.0	3.8	5.1	-	1.5	1.6	30.6	3.1	-	1.8	0.8	0.0	2.0	-	-	-	-	0.2	0.7	46.1	100.0
DUMBARTON	-	-	7.2	19.3	-	0.0	2.5	-	0.1	35.0	0.2	2.3	-	0.7	-	-	-	0.0	0.3	-	0.4	-	31.8	100.0
EAST KILBRIDE	0.4	0.0	6.1	1.3	1.1	0.9	0.1	4.7	1.4	29.1	1.5	1.2	3.8	0.1	0.4	1.5	0.3	1.5	0.0	0.0	4.3	0.4	39.8	100.0
PARKHEAD	0.6	0.0	6.1	2.0	1.6	1.3	0.2	5.7	2.3	38.3	2.4	1.2	5.4	0.2	0.4	2.1	0.2	1.1	0.0	0.1	4.1	0.6	24.2	100.0
GLASGOW CITY CENTRE	0.1	0.0	3.0	1.2	0.4	0.4	0.1	1.8	0.6	14.6	0.7	0.9	1.5	0.1	0.2	0.6	0.1	0.6	0.0	0.0	1.7	0.2	71.1	100.0
EASTERHOUSE	0.6	-	4.4	1.6	1.9	1.6	0.1	5.5	2.6	40.0	2.9	0.2	6.3	0.3	0.6	2.5	0.2	0.6	0.0	0.0	2.7	0.7	24.8	100.0
GREENOCK	-	0.0	22.7	8.1	-	-	1.2	0.2	0.1	24.5	0.0	11.8	-	-	-	-	0.2	6.1	-	-	3.4	-	21.6	100.0
HAMILTON	0.8	-	2.1	0.4	2.4	1.2	0.1	9.2	1.8	31.9	2.6	1.9	8.1	0.3	0.8	3.2	0.4	0.4	-	0.0	2.1	0.8	29.6	100.0
KIRKINTILLOCH	-	-	3.5	0.4	0.3	6.2	0.1	0.1	1.8	64.7	3.4	-	-	2.3	-	-	-	-	-	-	0.7	-	16.5	100.0
LANARK	0.5	-	0.4	-	1.6	0.0	-	10.2	0.3	23.5	1.8	-	19.2	-	2.6	9.1	-	-	-	-	0.4	2.6	27.8	100.0
MOTHERWELL	1.5	-	0.8	0.0	4.4	0.3	-	11.7	1.3	31.5	3.5	-	15.3	0.0	1.6	6.1	-	-	-	-	0.8	1.6	19.6	100.0
NEWTON MEARNS	-	0.1	7.5	0.0	0.0	-	-	9.0	0.2	28.4	0.0	0.2	0.5	-	0.0	-	1.7	2.5	-	0.2	15.6	-	33.9	100.0
PAISLEY	0.2	0.0	15.2	3.9	0.5	0.3	0.6	2.9	0.4	32.7	0.2	5.7	0.7	0.0	0.0	0.2	0.7	3.7	0.1	0.1	7.6	-	24.2	100.0
PARTICK	-	-	13.3	13.6	-	-	0.1	0.0	0.7	38.2	0.0	0.0	-	-	-	-	-	1.1	0.3	-	1.1	-	31.6	100.0
SHAWLANDS	-	0.1	8.9	-	-	-	-	3.8	0.4	53.9	0.1	-	-	-	-	-	3.0	1.2	-	0.5	26.1	-	2.0	100.0
POLLOK	0.3	0.0	8.7	3.4	0.5	0.5	0.2	5.0	1.4	33.9	1.2	2.2	2.6	0.1	0.1	0.9	0.4	1.8	0.0	0.1	5.4	0.2	30.9	100.0
WISHAW	2.3	-	0.5	0.0	2.1	0.3	-	12.5	0.7	35.5	3.3	-	24.8	-	3.1	12.0	-	-	-	-	0.4	3.2	-	100.0

How the network of strategic centres functions in relation to comparison shopping patterns⁶³

The data from Figure 1 and Map 2 outlines that there are four distinct spheres of influence in the city region. These are:

1. The overall dominance of the city centre across and beyond the network
2. North and West
3. South and West
4. North and East
5. South and East



⁶³ Please note that these four areas have been created based on an informed judgement for analysis purposes but clearly these areas do not operate in isolation from each other and there are overlaps and interrelationships between them

Glasgow City Centre

Given the scale and diversity of offer in Glasgow City Centre, it is unsurprising that the data shows it as the dominant centre in both the network and in Scotland. This is reflected in the fact that it retains around 14.6% of its catchment population, and draws shoppers from all of the other strategic centres' catchments as well as from out with the city region. It draws between 24% and 40% of the catchment populations of 19 strategic centres (which vary in scale and attraction) with Kirkintilloch and Shawlands leaking 64.7% and 53.9% of their catchment populations respectively. The scale of leakage from these latter two centres reflects both their proximity to the City Centre and the limited nature of their comparison offer.

It is important to note that the City Centre has a relationship with the larger centres, such as Braehead, East Kilbride, Hamilton and Pollok, and to a lesser extent to most of the other remaining centres across the network. The extent of the City Centre's catchment means that it overlaps with other centres' catchments, so some leakage would be expected.

North and West

Clydebank is the largest centre in the sector. It retains 5.4% of its catchment population, and is strongly related to Braehead. It is also the main centre for shoppers from parts of Argyll and Bute.

Dumbarton retains only 2.5% of its catchment population, and is strongly related to Clydebank, leaking 19.3% of its catchment population to that centre, as well as 7.2% to Braehead.

Greenock retains a high proportion of its catchment population (11.8%), reflecting its position at the edge of the GCV area, and therefore its relative distance from a major centre. It also benefits from shoppers from Ayrshire. Nevertheless, it leaks to the nearest major centres, Braehead (22.7%), and Glasgow City Centre (24.5%). It also has a significant relationship with Clydebank, leaking around 8.1% of its catchment population to that centre.

Partick/Byres Road is a small centre, with a limited comparison offer. As a result, it retains only 0.3% of its catchment population, and leaks significantly to both Braehead (13.3%) and Clydebank (13.6%).

South and West

This sector has two major centres, Braehead and Pollok, which interlink strongly with each other, and with Glasgow City Centre. All three centres have benefited from recent investment to improve their offer. Braehead and Pollok also have a significant influence on the other centres, namely, Greenock, Paisley, Barrhead, Newton Mearns and Shawlands.

Braehead is the second largest centre in the network. It retains 6.6% of its catchment population, and leaks mainly to Glasgow City Centre (30.5%), Pollok (3.8%) and Clydebank (2.7%). Pollok retains a lower proportion of its catchment population (5.4%), and also leaks more to Glasgow City Centre (33.9%), Braehead (8.7%), and Clydebank (3.4%).

Paisley retains only 3.7% of its catchment population, and has a series of strong relationships with Braehead and, more recently, Pollok. It leaks significantly to Glasgow City Centre (32.7%), Braehead (15.2%) and Pollok (7.6%).

The low level of shoppers retained by the smaller centres in this sector (Barrhead 0.3%, Newton Mearns 1.7% and Shawlands 0.5%) reflect both the relative size of these centres

and the influence of Braehead and Pollok. These centres are essentially fulfilling a local retail function, although performing other roles which are more strategic.

North and East

There is one major centre in this sector, Easterhouse, and it is starting to attract shoppers from a wider catchment. Airdrie, Coatbridge and Cumbernauld are strongly connected, with Airdrie leaking 9.1% of its catchment population to Coatbridge and 4.4% to Cumbernauld. Both centres leak to the largest centre in the sector, Easterhouse, with figures of 6% for Airdrie and 5.6% for Coatbridge respectively. Cumbernauld and Kirkintilloch are strongly related to each other, with 6.2% leakage from Kirkintilloch to Cumbernauld. They are also influenced by Easterhouse, with leakage of around 3% from both centres respectively.

Overall the centres have been relatively successful in retaining catchment population, which ranges from 2.9% for Easterhouse to 5.1% for Cumbernauld and Coatbridge. But they do have high leakage figures to Glasgow City Centre, with three of the five centres of experiencing a loss of catchment population of around 40% or more. Kirkintilloch is essentially a local centre; it retains only 2.3% of its catchment population, and leaks 64.7% to Glasgow City Centre, which reflects its size, the limited scope of its comparison offer and its proximity to the City Centre.

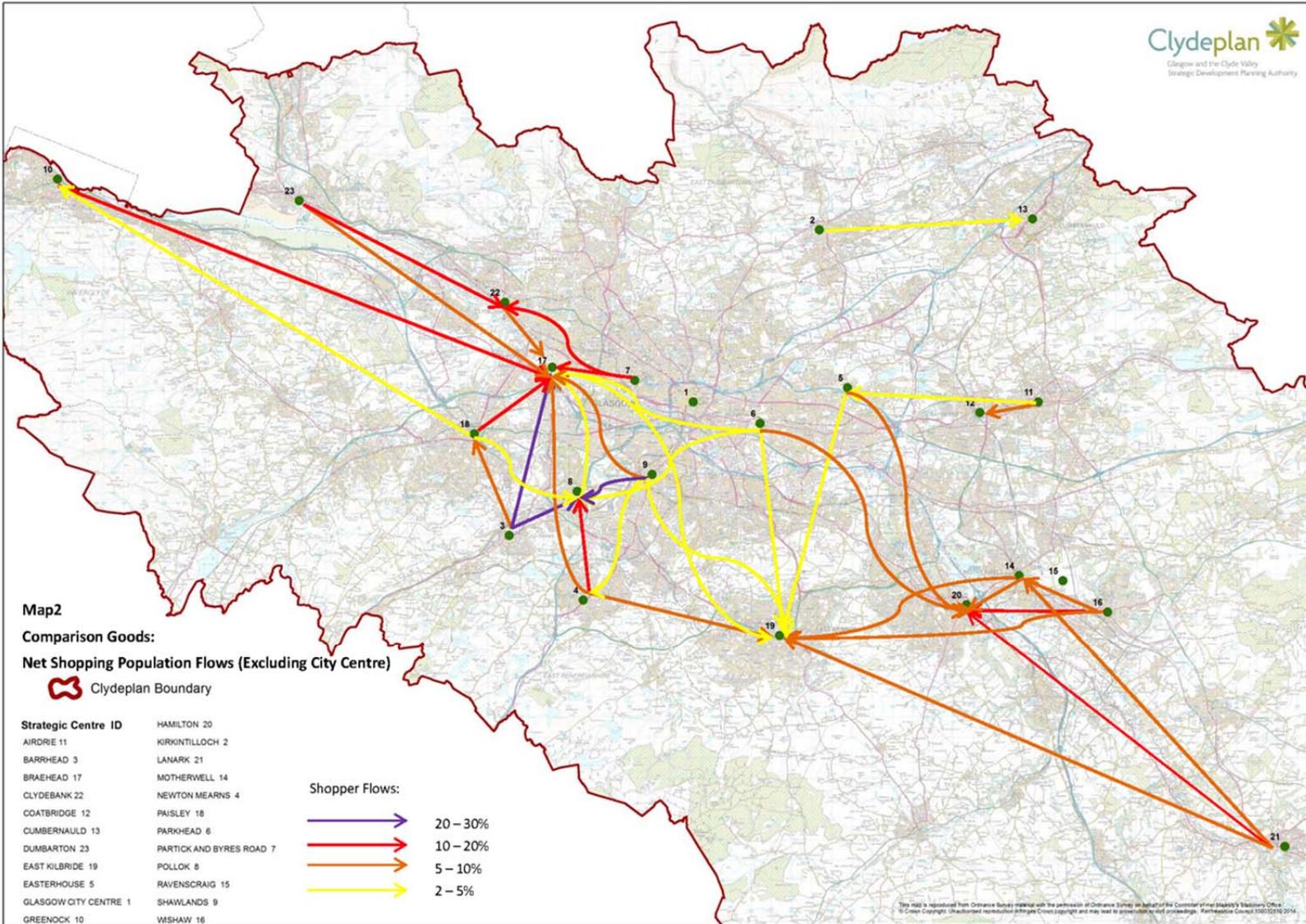
South and East

The major centre in this sector is East Kilbride. It is significantly related to all the other centres in this sector, namely, Hamilton, Lanark, Motherwell, Wishaw and, to a lesser extent, Parkhead. East Kilbride also draws from Newton Mearns' catchment population to the west. It is strongly affected by Glasgow City Centre, Braehead, Pollok and Hamilton, with leakage of 29.1%, 6.1%, 4.3% and 3.8% to these centres respectively, with the result that it retains only 4.7% of its catchment population, the lowest of the major centres.

Hamilton is also a significant centre, retaining 8.1% of its catchment population, and having a significant influence on the other centres in the sector. It leaks 9.2% of its catchment population to East Kilbride. In comparison to East Kilbride, Hamilton has a greater influence on Lanark and Wishaw, with these centres experiencing higher leakage to Hamilton than they do to East Kilbride, with figures for Hamilton of 19.2% and 24.8% respectively. To some extent, this reflects the position of Lanark and Wishaw to the east and south east of Hamilton, and their relative distance from East Kilbride, as well as the effect of recent investment in Hamilton.

Motherwell is a medium sized centre, with a wider comparison offer, and therefore is able to retain 6.1% of its catchment population. It leaks 11.7% of its catchment population to East Kilbride.

Lanark and Wishaw perform more local retail functions. They retain only 2.6% and 3.2% of their respective catchment populations, and experience significant leakage to East Kilbride, Hamilton and Motherwell. They are both relatively small centres, with a more limited comparison offer. Lanark's position at the edge of the GCV area may offer an additional explanation for the extent of leakage.





Clydeplan

Lower Ground Floor, 125 West Regent Street, Glasgow G2 2SA

0141 229 7730 • info@clydeplan-sdpa.gov.uk • www.clydeplan-sdpa.gov.uk