Glasgow and the Clyde Valley Strategic Development Plan

Proposed Plan

Background Report 14

Network of Strategic Centres

June 2011

14

CONTENTS

1.	Introduction	1
2.	The Strategic Network of Centres	1
3.	Retailing in Scotland and Glasgow and the Clyde Valley	3
4.	Analysis of Urban Centres	6
5.	Developing A Strategy for Urban Centres	11
6.	Convenience and Bulky Goods Retailing	18

Appendices:

A. Core Comparison Goods Catchment Maps
B. Convenience Goods Rankings
C. Bulky Goods Rankings
D. Convenience and Bulky Goods Retailing Maps
E. Data Sources and References

1. Introduction

This Background Report accompanies the Strategic Development Plan, providing supporting detail on urban centres and retailing in Glasgow and the Clyde Valley. It follows on from consultation at the Main Issues Report stage, which led to the identification of a Strategic Network of Centres and a focus on the role and function of these centres. This report also considers general and recent retail trends, before looking in more detail at the retail characteristics of centres in Glasgow and the Clyde Valley, mainly in terms of non-food (comparison goods) retailing, but also considering convenience and bulky goods retailing patterns. This leads on to observations the development of a strategy for urban centres, plus consideration of the guidance of strategic retail development to urban centres.

2. The Strategic Network of Centres

This Background Report follows on from the Main Issues Report consultation. At that stage, three scenarios were considered:

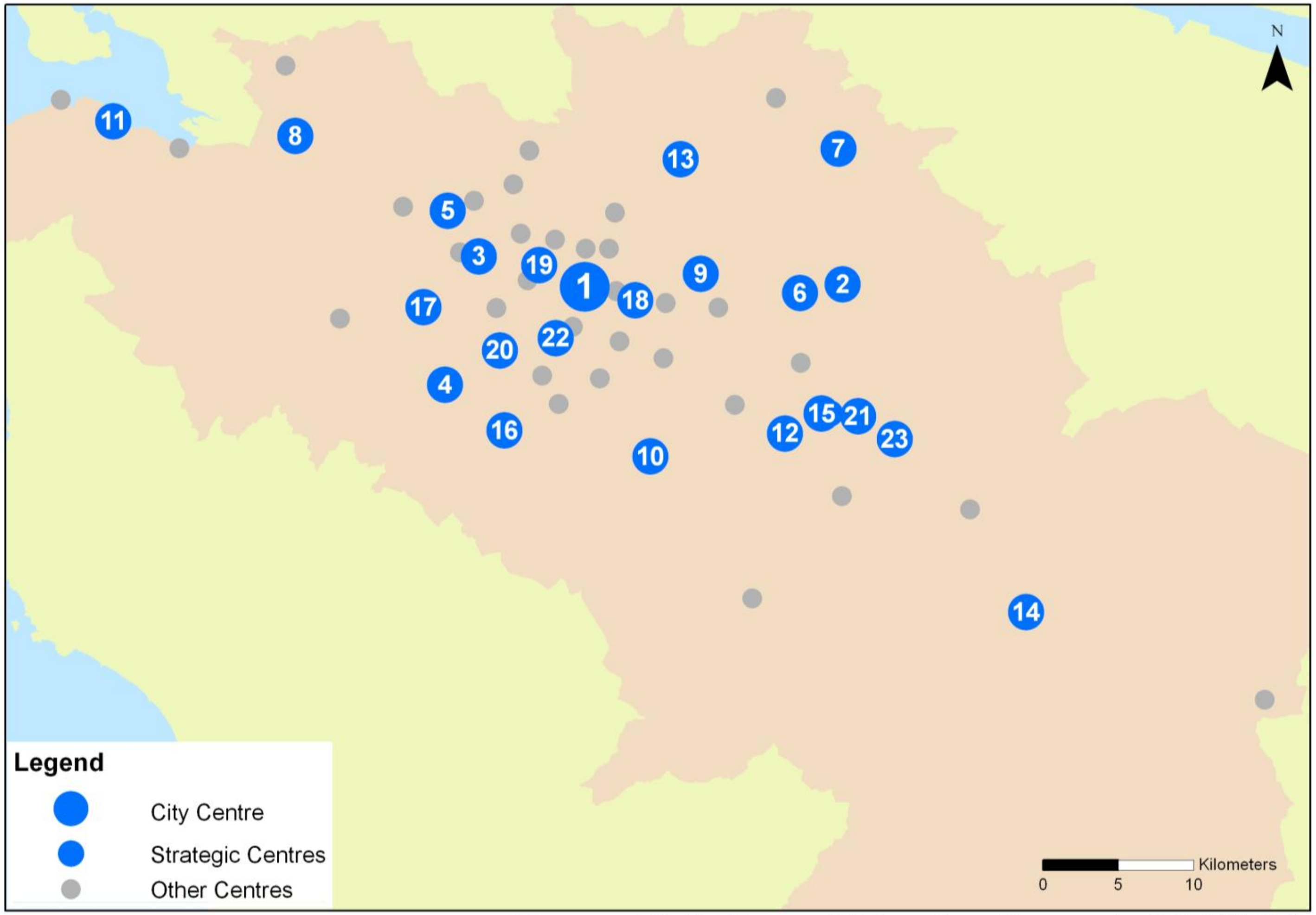
- City Centre Only Focus
- City Centre and Strategic Centre Focus
- All Centres Focus

The most sustainable balance between centralisation and localism was identified as the second scenario, a focus upon the City Centre plus identified Strategic Centres. This was taken forward in terms of identification of a Strategic Network of Centres, as shown in Figure 1 below and Figure 2 overleaf.

Figure 1. The Network of Centres

City Centre	1. Glasgow City Centre	
Strategic Centres	2. Airdrie 3. Barrhead 4. Braehead 5. Clydebank 6. Coatbridge 7. Cumbernauld 8. Dumbarton 9. Easterhouse 10. East Kilbride 11. Greenock 12. Hamilton	13. Kirkintilloch 14. Lanark 15. Motherwell 16. Newton Mearns 17. Paisley 18. Parkhead 19. Partick/Byres Road 20. Pollok 21. Ravenscraig 22. Shawlands 23. Wishaw
Other Centres	All other local centres within Local Development Plan areas	

Figure 2. The Strategic Network of Urban Centres in Glasgow and the Clyde Valley



The initial proposal was to identify strategic centres in terms of 'retail' and 'other' roles and functions but, given the expected mix and diversity of roles and functions in centres, this was viewed as too prescriptive. So, a looser Strategic Network of Centres has been taken forward, based upon retail offer and local strategic significance.

Although centres are expected to offer a diverse range of uses, roles and functions, one of the main functions is retailing, which is the primary focus of this background report. Nevertheless there are a range of roles and functions which centres should aspire to:

- Retail
- Public Transport Hub
- Civic and Community
- Tourist and Cultural
- Employment and Business
- Leisure and Entertainment

This network of centres is considered in more detail in the following sections, within the context of the general retail market and also looking at current and future retail analysis. From this, some general strategic principles for promotion and management of the network can be identified, to be taken forward in supporting plans and policies

3. Retailing in Scotland and Glasgow and the Clyde Valley

The Main Issues Report (2010) highlighted that, in Scotland, retailing contributes some 29% of expenditure-based GDP (around 5% of total GDP in 2011) and that annual growth has outstripped other sectors of the economy. The retail industry employs over 235,000 persons, some 10% of the workforce, constituting one in eight businesses. The retail turnover of £24bn is 11% of total Scottish turnover. In 2011, analysis of retail sales in Scotland indicates that both food and non-food retailing has exhibited modest growth over the period of the recession, with prices falling for non-food goods and increasing for food due to worldwide inflationary pressures. From 2007 to 2010, non-store retailing has outstripped store-based retailing in terms of sales growth. [1]

Glasgow has a turnover of £2.4bn per annum with over 1,500 shops, and 10% of the Glasgow workforce are employed in retailing. Glasgow has been ranked 2nd in recent UK rankings (behind London and ahead of Birmingham) and 17th in European rankings as a retail destination, the only UK city other than London in the European top 20. The particular role of Glasgow is obvious from these rankings, but other centres within Glasgow and the Clyde Valley are also drivers of the economy and employment. As well as providing a major economic and employment contribution, retail is at the heart of vital and viable town centres. [2]

Recent Retail Trends – Decline of Centres

National retail policy guidance is focussed upon the role and function of town centres and other centres in meeting retail demand, and the Development Plan is required to identify a network of such centres, safeguarding and promoting town centres. Retail is usually the central function of such a centre, with other land uses which combine to create a vital and viable town centre, but the general trend has led to unsustainable car-based comparison goods shopping as well as impacting upon the vitality and viability of existing ‘traditional’ town centres and potentially undermining the city centre. This pattern of shopping is not sustainable, but it must be recognised that this phenomenon is established and look to mitigation measures which will focus and restrict growth to the most appropriate centres, in particular those which are accessible or can be made accessible.

The growth in demand has led to a significant expansion in retail floorspace, particularly in new locations in mall-style formats accessible to the road network, usually with free parking for customers. In part, this is due to retailers requiring new higher-quality formats and larger units to attract customers, and also because of the scope for investment in (and return from) such ventures. However, such car-served locations tend to be less accessible by sustainable modes of travel (and the perception of convenience leads to the car being the preferred modal choice) and with a less diverse range of uses, roles and functions than traditional centres.

The growth in new shopping locales and higher quality formats has been mirrored by a decline in traditional town centres on established bus and rail networks, which cannot compete in terms of quality, format and parking provision. In these locations, the range of other uses (leisure, recreation, cultural, service) is usually greater, albeit undermined by decline in vitality and viability arising from the retail impact of competing locations.

In Glasgow, for example, overall comparison goods floorspace has increased by some 18% (some 150,000 sqm gross) between 2003 and 2008. However, the City Centre has seen a slight decline and most of this increase has been on other centres (57% growth or 108,000 sqm gross; 72% of the new floorspace) and out of city centre (18% or 43,000 sqm gross; 28% of the new floorspace), notably at Silverburn and Fort. Nevertheless, this trend is recognised and development to 2013 is focussed on the City Centre, with nearly half of new floorspace destined for proposals in this location. [3]

Recent Retail Trends – Recession and Downturn

Over recent years and decades, expenditure has grown markedly for the comparison goods market in particular, as the economy has grown, partly fuelled by cheap credit and high rates of borrowing. Fashion goods and hi-tech electronic goods have been in particular demand. This has been mirrored by the growth of discounted goods and inexpensive imports, particularly through the integration of comparison fashion and household goods into superstores.

Retail has proven to be more resilient to the downturn than other sectors and industries. Manufacturing output slumped by some 14% between 2008 and 2009, whereas at the same time the volume of retail sales increased by 1.5%. However, some of this may be due to competition driving down costs in the sector. In past recessions, the retail sector has tracked the manufacturing sector and spending has also followed GDP growth, so the effects of the recession and fiscal policy may be yet to appear.

However, household debt levels and employment insecurity have led to a squeeze on spending. To an extent, the market has absorbed this impact because of competition between retailers and reduced margins, and sales volumes have remained buoyant. Nevertheless, the protracted nature of the downturn and the focus on national debt and deficit reduction (such as the VAT increase and public spending cuts) will place further pressure on household budgets which may well be exacerbated by inflationary pressures and further increases in the cost of essential goods and services. As a consequence, recent expenditure growth trends (for comparison goods) will not be sustained and are unlikely to return until the end of the decade. Recent research by GVA Grimley indicates that this may be a long-term change, with 3% comparison goods expenditure growth per annum over the next fifteen years (2.5% per annum overt the next five years) which is a significant reduction in pre-recessionary growth from the late 1990s onwards. [4]

Recent Retail Trends – Store Formats and Internet Shopping

One of the trends has been the increase in out-of-centre retailing in recent decades, driven in part by customer demand and also by retailers seeking larger floorplates, which town centres can struggle to accommodate. This trend is likely to continue, placing further pressure on town centres. However, the growth of internet shopping may modify customer demand for formats. Also, retail rental value growth has declined for retail warehouses alongside standard shops and in-town shopping centre formats, for the first time since the establishment of this sector, which is now viewed as more 'mature' and outperforming traditional formats by a lower margin than in the past..

Internet shopping has increased rapidly, both for comparison goods (with an increased range of choice available) and for convenience goods, notably weekly shopping. This has a particular impact on books and music retailing, and also includes the re-sale and auction of goods.

Online expenditure has increased by some 15% per annum to 2009, and although this impacts more on certain sectors and is likely to peak, it could account for some 70% of the music and video market by 2013. It was recently reported that the volume sales of e-reader books (Kindle) had overtaken hardback sales (Amazon). Online spending is predicted to grow by a third by 2014. [5]

The growth in internet retailing could lead to a change in format to accommodate 'showroom' styles, where goods are examined and ordered for home delivery, rather than kept in stock. This may well affect the trend towards larger units and the 'mature market' of out-of-centre retail warehousing.

Recent Retail Trends – Conclusion

Retail has been resilient during the recession, compared to other sectors, but the continuing downturn and focus on deficit reduction will have a prolonged impact. The convenience sector has suffered, and will suffer, from food inflation. Comparison goods have seen continued expenditure growth, but significantly reduced on the unsustainable 'boom' times of the last decade. Internet expenditure has evidenced significant growth, particularly in the music and book sectors, and this will certainly continue. The demand for larger store formats is a challenge that 'traditional' centres will have to continue to cope with, but the trend towards internet retailing and the 'maturity' of the out-of-centre retail warehouse market may affect the long-term development pressure for out-of-centre sites.

4. Analysis of Urban Centres

Current Retailing Patterns in Glasgow and the Clyde Valley

For Glasgow and the Clyde Valley, total shopping population is some 1.67 million within the full catchment and 1.15 million within the core catchment. Expenditure is some £4,813m for the full catchment and £3,315m for the core catchment. This is shown below in Figure 3.

Figure 3. Shopper Population and Expenditure (NSLSP)

	Full Pop	***Full £m***	***Core Pop***	***Core £m***
Glasgow and the Clyde Valley	1.67m	£4,813m	1.15m	£3,315m

Current Retailing Patterns by Local Authority and by Centre

The core and full population and catchment figures for Glasgow and the Clyde Valley are an aggregation of the data by centre. Each centre has a catchment composed of postcode sectors which are aggregated to form core (70% of expenditure) and full (100% of expenditure) catchments, and these vary depending upon the 'penetration rate' that competing centres draw from a particular postcode centre.

Data can also be aggregated by local authority, as in Figure 4 below.

Figure 4. Shopper Population and Expenditure: Local Authorities (NSLSP)

	Full Catchment		***Core Catchment***	
Local Authority	***Pop***	***Spend***	***Pop***	***Spend***
Glasgow	1.09m	£2,896m	704,933	£2,030m
East Dunbartonshire	8,185	£27m	5,267	£17m
East Renfrewshire	5,697	£21m	3,779	£14m
Inverclyde	55,008	£150m	35,796	£94m
North Lanarkshire	86,740	£243m	54,375	£148m
Renfrewshire	217,583	£636m	150,834	£438m
South Lanarkshire	214,596	£645m	147,224	£447m
West Dunbartonshire	71,390	£195m	48,626	£126m
TOTAL	1.67m	£4,813m	1.15m	£3,315m

Expenditure by centre is shown in Figure 5 below. This ranges from the clearly-dominant Glasgow City centre, with some £2,616m of expenditure at the fullest extent, to the smallest centres. In terms of centres drawing expenditure in excess of £100m, Braehead is the second-largest centre, followed by East Kilbride, then Hamilton, Clydebank and Greenock, and Paisley and Pollok. A further eleven centres draw expenditure in excess of £10m. There is a hierarchy of centres evident in this list, certainly in terms of expenditure and shopping population, which relates to their strategic significance, and which informed the identification of the strategic network of centres (Figures 1 and 2) following the Main Issues Report stage.

Figure 5. Shoppers and Expenditure: Centre Ranking* (NSLSP)

Centre	LA	Full Pop	Full £	Core Pop	Core £
GLASGOW CITY	Glasgow	903,857	£2,616m	633,669	£1,841m
BRAEHEAD	Renfrewshire	173,987	£513m	121,264	£358 m
EAST KILBRIDE	South Lanarkshire	130,036	£399m	90,031	£282m
HAMILTON	South Lanarkshire	73,072	£212m	50,218	£145m
CLYDEBANK	West Dunbartonshire	62,774	£169m	43,290	£111m
GREENOCK	Inverclyde	54,090	£147m	35,379	£92m
PAISLEY	Renfrewshire	37,790	£106m	25,713	£69m
POLLOK	Glasgow	36,578	£107m	25,139	£75m
MOTHERWELL	North Lanarkshire	32,832	£91m	21,280	£58m
EASTERHOUSE	Glasgow	32,455	£86m	22,239	£59m
PARKHEAD	Glasgow	29,423	£69m	20,343	£45m
CUMBERNAULD	North Lanarkshire	18,426	£55m	11,776	£34m
COATBRIDGE	North Lanarkshire	17,264	£46m	11,597	£30m
AIRDRIE	North Lanarkshire	8,928	£25m	4,807	£13m
WISHAW	North Lanarkshire	8,527	£24m	4,533	£12m
LANARK	South Lanarkshire	7,664	£23m	5,133	£15m
DUMBARTON	West Dunbartonshire	7,608	£23m	4,848	£14m
N MEARNS	East Renfrewshire	5,073	£19m	3,398	£13m
KIRKINTILLOCH	East Dunbartonshire	3,991	£12m	2,602	£8m
LINWOOD	Renfrewshire	2,603	£7m	1,798	£5m
MILNGAVIE	East Dunbartonshire	1,914	£7m	1,238	£4m
RENFREW	Renfrewshire	1,871	£5m	1,308	£4m
RUTHERGLEN	South Lanarkshire	1,550	£4m	1,033	£3m
JOHNSTONE	Renfrewshire	1,269	£4m	752	£2m
BISHOPBRIGGS	East Dunbartonshire	1,169	£3m	699	£2m
BEARSDEN	East Dunbartonshire	1,111	£4m	729	£3m
GOVAN	Glasgow	1,064	£3m	671	£1m
SHAWLANDS	Glasgow	981	£3m	645	£2m
PORT GLASGOW	Inverclyde	918	£2m	417	£1m
ROBROYSTON	Glasgow	909	£2m	467	£1m
PARTICK	Glasgow	822	£2m	466	£1m
TORYGLEN	Glasgow	757	£2m	425	£1m
BLANTYRE	South Lanarkshire	755	£2m	518	£1m
ALEXANDRIA	West Dunbartonshire	754	£2m	488	£1m
BARRHEAD	East Renfrewshire	624	£2m	380	£1m
BELLSHILL	North Lanarkshire	579	£2m	262	>£0.6m
CARLUKE	South Lanarkshire	531	£2m		>£0.2m
FARADAY	North Lanarkshire	483	£1m	292	£1m
SPRINGBURN	Glasgow	410	£1m	191	>£0.4m
MARYHILL	Glasgow	363	£1m	228	>£0.6m
DARNLEY	Glasgow	322	£1m	100	>£0.2m
DRUMCHAPEL	Glasgow	303	£1m	182	>£0.4m
STRATHAVEN	South Lanarkshire	275	£1m	149	>£0.5m
BIGGAR	South Lanarkshire	237	£1m		
LARKHALL	South Lanarkshire	199	>£1m	73	>£0.2m
KILSYTH	North Lanarkshire	184	>£1m	120	>£0.3m
CASTLEMILK	Glasgow	163	>£1m	82	>£0.2m
BALLOCH	West Dunbartonshire	254	>£1m		
SHETTLESTON	Glasgow	162	>£1m	87	>£0.2m
CAMBUSLANG	South Lanarkshire	143	>£1m	68	
BAILLIESTON	Glasgow	116	>£1m		
CLARKSTON	East Renfrewshire	107	>£1m		
UDDINGSTON	South Lanarkshire	87	>£1m		
ANNIESLAND	Glasgow	79	>£1m		
ERSKINE	Renfrewshire	63	>£1m		
HILLINGTON	Glasgow	49	>£1m		
KINGSGATE RP	South Lanarkshire	48	>£0.1m		
TOTAL		**1,668,393**	**£4,813m**	**1,151,127**	**£3,315m**

*some centres do not feature in NSLSP survey returns

Another consideration is the degree of expenditure drawn from outwith Glasgow and the Clyde Valley. This is shown in Figure 6 below for centres.

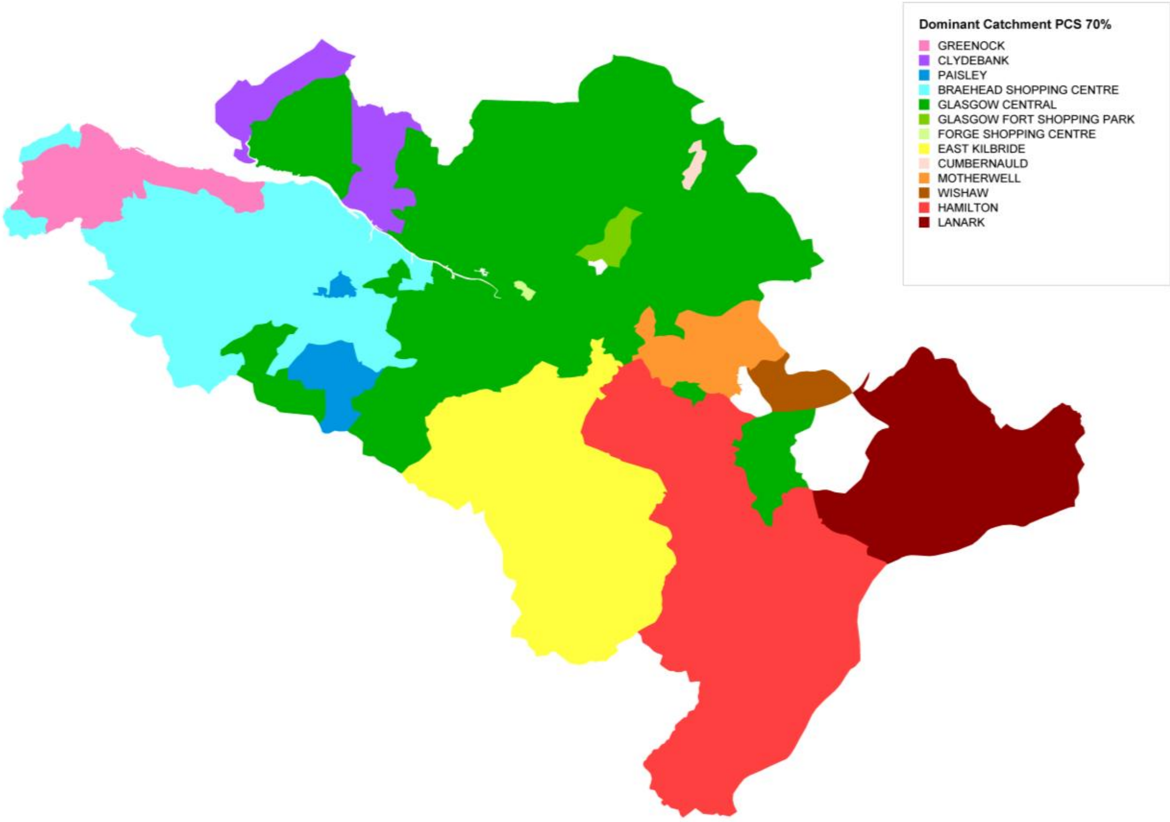
Figure 6. Imported Expenditure from outwith GCV (NSLSP)

Centre	Full Pop	Full £	Core Pop	Core £
Glasgow	151,420	£457m	43,128	£135m
Braehead	20,087	£62m	7,150	£23m
Greenock	13,152	£38m	1,093	£4m
Clydebank	11,048	£36m	6,379	£21m
East Kilbride	6,025	£17m	0	0
Dumbarton	3,309	£11m	1,600	£5m
Pollok Silverburn	3,102	£9m	237	£1m
Paisley	1,056	£3m	0	0
Cumbernauld	784	£2m	0	0
Easterhouse Fort	183	£1m	0	0
Parkhead Forge	179	>£1m	0	0
Motherwell	114	>£1m	0	0
Hamilton	44	>£1m	0	0

Current Retailing Patterns by Dominance

As centres compete for expenditure within postcode sectors, certain centres will exhibit a dominant influence (other than where the share is equal). This is mapped below in Figure 7, and provides an interesting spatial perspective. Core catchments are shown in Appendix A for comparison goods.

Figure 7. Dominant Centres: Core Catchments (NSLSP)



It is clear from Figure 7 that a small number of centres are dominant over varying geographical areas. This reflects the scale of the offer as well as other factors, such as a lesser offer in some areas, and also the geographical self-containment of some centres. This is a consideration in terms of defining a strategic network of centres, not only for those centres with extensive dominance, but for centres of local importance which may need to focus on role and functions other than retail.

Current Retailing Patterns by Expenditure Flow

The general pattern of expenditure flows between core catchment centres can also be considered, and this is shown at Figure 8. Each centre is listed on the matrix in rows and columns. The percentage expenditure retained can be found at the intersection between centres in the matrix and is shown in bold. The percentage expenditure migrating to other centres is shown along the rows, and by scrutinising the columns, an estimate of the magnitude of expenditure attracted by centres from other centres can be formed.

This pattern of expenditure flows is for the current position as detailed within NSLSP. It will in all likelihood change as the dynamics of the retail environment change, and assumptions can be drawn about prospective changes, for example if floorspace was restricted in one location and promoted in another, to 'claw back' expenditure.

From the matrix below, it is clear that centres retain varying degrees of expenditure, losing expenditure from within their catchments to higher order centres. Retained expenditure varies from 1% for Barrhead to 54% for Glasgow and Greenock. In the latter example, this reflects both the magnitude of Glasgow and also the relative self-containment of Greenock.

Conversely, centres attract spend from other lower-order centres. These include Glasgow, Braehead, East Kilbride, Easterhouse and Hamilton.

It may not be desirable to retain this precise pattern over future years, but it does reflect the broad hierarchy of centres and retention of full expenditure in centre catchments is unrealistic.

Figure 8. Expenditure Flows between Centres and Core Catchments (NSLSP)

To From	GLASGOW CENTRAL	AIRDRIE	BARRHEAD	BRAEHEAD	CLYDEBANK	COATBRIDGE	CUMBERNAULD	DUMBARTON	EAST KILBRIDE	EASTERHOUSE	GREENOCK	HAMILTON	KIRKINTILLOCH	LANARK	MOTHERWELL	NEWTON MEARNS	PAISLEY	PARKHEAD	PARTICK	POLLOK	SHAWLANDS	WISHAW
GLASGOW CENTRAL	**54%**	1%		6%	3%	1%	1%		3%	2%	1%	1%			1%			2%		2%		
AIRDRIE	44%	**18%**		1%		5%	1%		5%	4%		2%			1%							
BARRHEAD	30%		**1%**	24%	6%				1%							1%	18%			5%		
BRAEHEAD	34%			**30%**	3%			1%			4%						9%			3%		
CLYDEBANK	36%			8%	**35%**			4%														
COATBRIDGE	45%			1%		**26%**			4%	4%		2%			1%			1%				
CUMBERNAULD	48%						**27%**		1%	1%								1%				
DUMBARTON	34%			12%	26%			**13%**														
EAST KILBRIDE	29%			1%					**43%**	1%		10%						1%		1%		
EASTERHOUSE	48%	3%		1%		5%	1%		4%	**10%**		2%			3%			5%				
GREENOCK	19%			10%	1%						**54%**											
HAMILTON	28%								16%	1%		**36%**		2%	2%							2%
KIRKINTILLOCH	68%			4%	1%		1%			2%			**10%**									
LANARK	25%								4%	1%		13%		**21%**	4%							1%
MOTHERWELL	31%								8%	3%		13%			**28%**			1%				2%
NEWTON MEARNS	47%			6%					15%							**11%**				10%		
PAISLEY	22%			33%													**26%**			3%		
PARKHEAD	51%			1%						9%								**16%**				
PARTICK	60%			11%	2%					1%								4%	**3%**			
POLLOK	49%			10%					6%								2%			**14%**		
SHAWLANDS	65%			3%					3%											10%	**2%**	
WISHAW	29%								7%	1%		15%			14%							**17%**

The Network of Strategic Centres

There is a hierarchy of centres in terms of retail performance. Glasgow is overwhelmingly dominant with over £1,800m in terms of core catchment expenditure. There is a ‘top five’ including Glasgow, Braehead, East Kilbride, Hamilton and Clydebank, which feature core catchment expenditure in excess of £100m.

A further five centres display a core retail catchment level of expenditure in excess of £50m: Greenock, Paisley, Pollok, Motherwell and Easterhouse. There are eight additional centres with core expenditure exceeding £10m: Parkhead, Cumbernauld, Coatbridge, Airdrie, Wishaw, Lanark, Dumbarton and Newton Mearns.

Many of these centres exhibited significance in terms of spatial dominance, expenditure drawn from outwith Glasgow and the Clyde Valley, and also in terms of retained expenditure and expenditure attracted from other centres.

The centre of Kirkintilloch was considered for inclusion as this was close to the centres listed above, and was the only such centre located within East Dunbartonshire.

Following consultation at Main Issues Report stage, the list of twenty centres was expanded to include Barrhead, Partick/Byres Road, and Shawlands. Barrhead fulfils a strategic spatial function in East Renfrewshire, and both Partick/Byres Road and Shawlands have significant retail floorspace that is perhaps overshadowed by the City Centre. It was agreed that these centres should be included within the Strategic Network of Centres as show earlier in Figure 1 and Figure 2.

5. Developing A Strategy for Urban Centres

There are two main tasks that the Development Plan must address.

- Identification of a Network of Centres, including town centres
- Defining Centres, their use mix and status

The Strategic Development Plan identifies the Network of Centres as constituting the City Centre, other strategic centres and local centres. The focus of the Strategic Development Plan is upon the City Centre and on other strategic centres, with a general expectation that Local Development Plans will identify and define all centres within their areas of responsibility, including local centres.

There are two general types of Strategic Centre: those with established strategic importance as a retail centre within Glasgow and the Clyde Valley, and those that are of strategic importance within their Local Authority area, not necessarily as a retail centre.

At the metropolitan scale, the city-region is dominated by Glasgow City Centre, which is the gravitational centre of all the Local Development Plan areas in Glasgow and the Clyde Valley. This dominance extends further into Scotland, with Glasgow City Centre as the dominant retail centre on the national scale, as the largest conurbation by far in Scotland, and of equal influence to Edinburgh in terms of all other roles and functions.

It is clear that Glasgow City Centre should be safeguarded and promoted as the strategic centre of the city-region and as the dominant urban centre of Scotland. Nevertheless, all centres are important and fulfil local and strategic roles within their

Local Development Plan Areas. These should also be safeguarded and promoted in terms of their roles and functions, in line with national planning policy.

Therefore, the Strategic Development Plan will provide an overarching framework in terms of role and function, for Local Development Plans to take forward. This should reflect characteristics such as their size, their catchment population and distance, the diversity of their services; for example:

- National and city-region economy i.e. Glasgow City Centre
- Regeneration e.g. Braehead, Easterhouse, Ravenscraig
- Governance and civic e.g. Kirkintilloch, Barrhead, Paisley
- Employment and Business e.g. Hamilton, East Kilbride, Greenock
- Retail e.g. Glasgow City Centre, Pollok, Braehead
- Leisure and Tourism e.g. Byres Road
- Market town e.g. Lanark

Some centres within the city-region, therefore, through scale, diversity, catchment, and environment, have taken on a more strategic role than others. Such centres possess, or should aim to possess, a balanced range of role and functions e.g. a retail role balanced by a leisure or cultural role. Underpinning this mix is accessibility by public and other sustainable modes and a key role as a public transport hub. The mix of roles and functions may give rise to further definitions that characterise the centre in strategic terms e.g. regional economic core, market town, regeneration catalyst, particularly following detailed consideration of their qualitative criteria.

Glasgow City Centre

Reflecting its focus as the employment, civic and cultural core of the city-region, the scale and the 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 tourism destination, Glasgow City Centre is at the apex of the network, its strategic economic significance and diverse range of core functions setting it apart from all other urban centres. Its long-term future is fundamental to the economic well-being of the city-region and its future must be secured through continuing investment and modernisation. The City-Centre’s fundamental strategic role must be safeguarded by the city-region’s authorities during the exercise of their development management function.

The Network of Strategic Centres

Under the sustainability-focused SDS, the wider network of urban centres beyond the City Centre equally needs to be protected and enhanced, with a channelling of investment to secure their respective roles, improve their quality of offer, their diversity, their public realm and environment, and their continuing sustainable accessibility.

The process of evolution and change will continue as the balance of role and function changes between centres.

Many traditional town centres, through physical configuration, ownership and historic role, have been experiencing long-term decline as modern trends towards large floor-space retail units have resulted in the development of separate free-standing retail and commercial centres. If that decline, collectively a strategic issue for the city-region, is to be addressed and the sustainable long-term future of traditional centres are to be secured, then active management measures need to be put in place by local authorities and centre managers. Radical and innovative management, new generation action plans, health checks, new funding models, need to be developed. In some instances, that need has already been identified.

On the other hand, in more modern urban centres, their diversity of offer may be limited, their focus overly balanced towards a single aspect of a centre's role and function, their accessibility dominated by the private car, their public transport services less developed than in traditional centres, their public realm less developed.. There is therefore equally a need to re-balance the offer of such centres to serve the wider needs of the communities that each serves. Equally in some instances, this deficiency is recognised and masterplans are coming forward to address the imbalance.

Figure 9 lists alphabetically the network of strategic centres, their current challenges and related future actions, and the range of interventions that will be required to support their long-term roles and functions. Local planning authorities, through their respective Local Development Plans and related action programmes, need to take forward the actions outlined in the Schedule.

- Strategic centres will be expected to possess, or to aim to possess, a balanced range of roles and functions. Underpinning this is 'accessibility' by sustainable modes of transport, and it is expected that a strategic centre will also be a public transport hub.

- The mix of roles and functions may give rise to further definitions that bring together a centre's roles and functions, ie 'regional economy', 'market town', or 'regeneration catalyst', particularly following detailed consideration of the qualitative factors.

- It is expected that development will be focused in centres in line with national planning policy and the 'sequential test'.

In terms of future retailing, it is expected that Local Development Plans will draw upon future and ongoing Retail Capacity Assessment work that will inform development potential.

Figure 9. Strategic Centres, Roles and Functions

Strategic Centre	Current Planning Status/ Dominant Roles and Function	Challenges	Future Actions
Glasgow City Centre	The primary commercial and business centre in the city-region which combines a high quality retail offer with leisure and entertainment facilities of national importance and also a national transport hub and international tourist destination	Competition from other retail locations.	Implement the City Centre Strategy Key measures include: Improve range and quality of retail offer; promote accessibility by all mode of travel; improve public realm
Airdrie	Town centre with civic and community, employment and business	Retail contraction	Development of 2nd generation Town Centre Action Plan to pursue diversification and regeneration opportunities
Barrhead	Town centre with regeneration, civic and community, employment and business	Urban decline. Competition with car-borne retailing.	Improve urban realm and retail offer
Braehead	Commercial centre with retail, leisure, commercial, employment and business	To diversify the roles and functions of the centre in support of the Clyde Waterfront regeneration initiative; to incorporate a range of functions including residential, civic, transport and leisure sectors, in order to maintain the sustainability of the centre and wider regeneration programme, thereby contributing to a Strategic Development Priority – Clyde Waterfront	Bring forward a masterplan for a further regeneration of the centre and wider environment
Clydebank	Town centre with retail, civic and community, leisure and entertainment, public transport hub, employment and business	Retail offer, expenditure leakage, mix of non-retail uses	Linkage to waterfront, promotion of development sites, new/improved public transport hub

Coatbridge	Town centre with civic and community, retail, employment and business	Retail contraction	Development of 2nd generation Town Centre Action Plan to pursue diversification and regeneration opportunities
Cumbernauld	Town centre with civic and community, employment, education, retail and business	Proximity to major retail centres	Development of 2nd generation Town Centre Action Plan to pursue diversification and regeneration opportunities
Dumbarton	Town centre with retail, civic and community, tourist and cultural, leisure and entertainment, employment and business	Retail offer, quality of environment, accessibility, town centre vacancies	Promotion of retail and residential development opportunities, new/refurbished retail floorspace, linkage to waterfront, improved accessibility
Easterhouse	Town centre with retail, civic and community and leisure	Poor linkages between different elements of the town centre	Seek to reconfigure land uses and promote movement within the town centre in line with Town Centre Action Plan
East Kilbride	Town centre with retail, civic and community, leisure, employment and business	Competition from other centres	Build upon existing catchment and public transport linkages. Assessment and review of retail offer to improve quality and level of provision.
Greenock	Town centre with retail, civic and community, leisure, employment and business	Good accessibility but need to address effects of declining population and the quality of the environment	Further improve public realm and retail offer, including the complementary role of Port Glasgow
Hamilton	Town centre with retail, civic and community, leisure, employment and business	Competition from retail locations	Promote further urban realm and improve quality of retail offer

Kirkintilloch	Historic town centre with strong civic, community, cultural and visitor functions	Competition from larger retail locations	Opportunity to deliver regeneration – investment in the quality of the public realm; significantly improving the range and quality of the retail offer
Lanark	Town centre with civic and community, tourism and culture	Limited rural catchment and accessibility	Market Town by role; improve accessibility
Motherwell	Town centre with retail, civic and community, employment and business	Retail contraction – proximity to strategic regeneration project (Ravenscraig)	Development of 2nd generation Town Centre Action Plan to pursue diversification and regeneration opportunities
Newton Mearns	Town centre with retail, civic and community	Limited scope for growth	Enhance and expand retail provision; encourage other complementary Town Centre uses
Paisley	Town centre with retail, civic, community and leisure	Area regeneration and diversification – reinforce community role, residential and niche retail	Implementation of the approved Paisley Town Centre action plan through the Paisley Vision Board
Parkhead	Town centre with retail, leisure and entertainment, civic and community	Poor quality streetscape and shopping environment	Strengthen retail offer and improve quality of public realm through Townscape Heritage Initiative
Partick/ Byres Rd	Town centre with retail, leisure, entertainment, tourism and cultural	Lack of development opportunities for modern large scale retailers within the centre	Manage the balance of retail and town centre uses through regular health checks
Pollok	Town centre with retail, civic and community	Retail element predominantly accessed by private car	Integrate community hub with high quality retail offer
Ravenscraig	Town centre regeneration, retail, education, leisure, employment and business	Extended timescale for delivery	Promote and support Ravenscraig masterplan

Shawlands	Town centre with civic and community, leisure and entertainment	Competition from other retail locations	Develop the leisure/ entertainment function and improve retail offer by attracting independent operators and niche retailers
Wishaw	Civic and Community	Retail contraction – proximity to strategic retail project (Ravenscraig)	Development of 2nd generation Town Centre Action Plan to pursue diversification and regeneration opportunities

6. Convenience and Bulky Goods Retailing

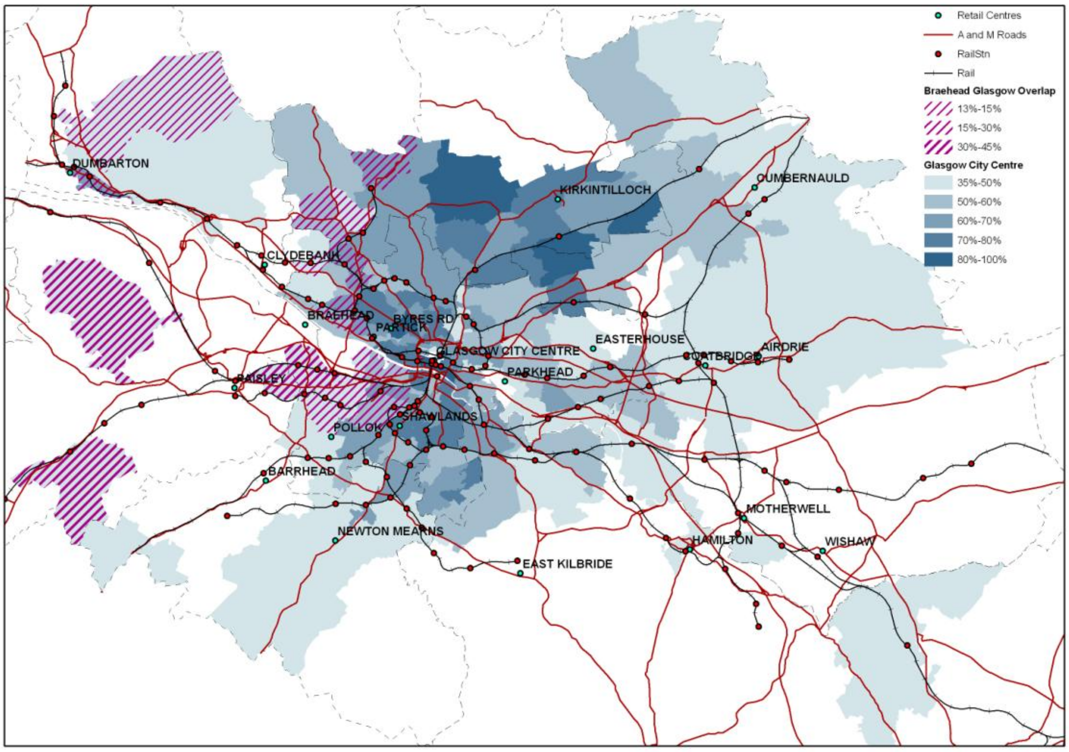
This research focuses upon comparison goods retailing as the main retail function of strategic centres. Convenience retailing tends to be more localised, serving neighbourhoods, and bulky goods retailing is typically out of centre and accessible by car. However, strategic centres will often have a significant offer in terms of both convenience and bulky goods. Also, the provision of such retailing is potentially a strategic issue at the level of Glasgow and the Clyde Valley.

Rankings and patterns of retailing are shown in Appendices B, C and D. It is clear that there is no significant spatial strategic issue regarding either convenience retailing or bulky goods retailing. There is a reasonable distribution and provision of such retailing across Glasgow and the Clyde Valley. A significant number of strategic centres have a significant bulky goods offer, and this should not be overlooked in favour of out-of-centre retail parks.

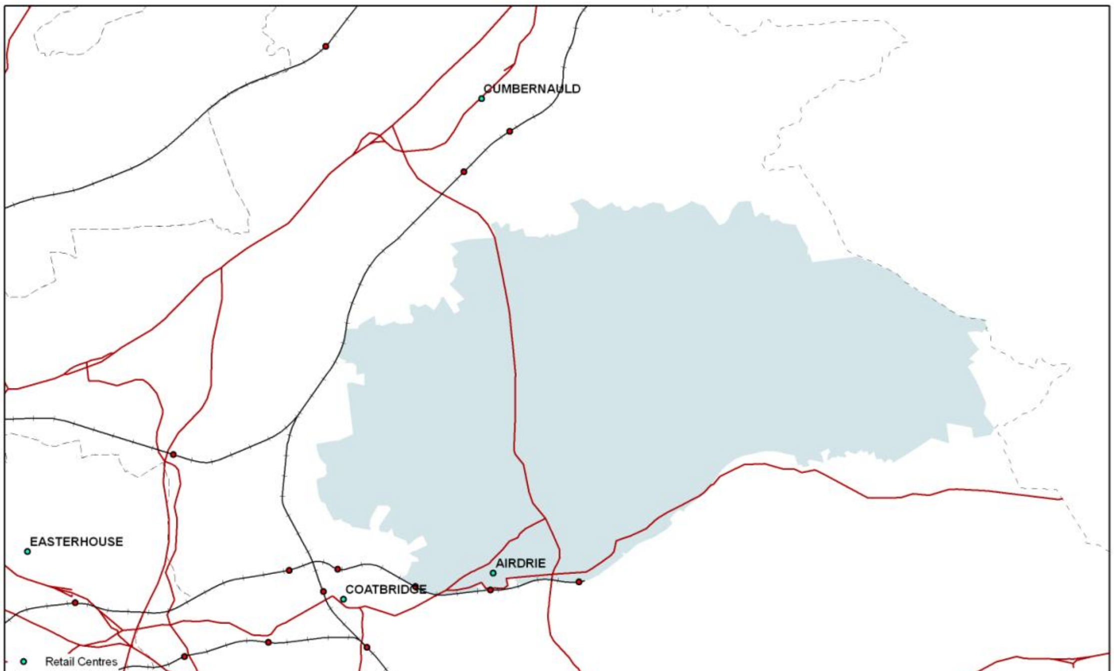
However, there is a risk that the vitality and viability of the Strategic Network of Centres could be undermined by the proliferation of comparison retailing in out-of-centre locations, both within retail parks and also as part of an increasingly large-scale superstore ancillary offer.

Appendix A: Centre Catchments

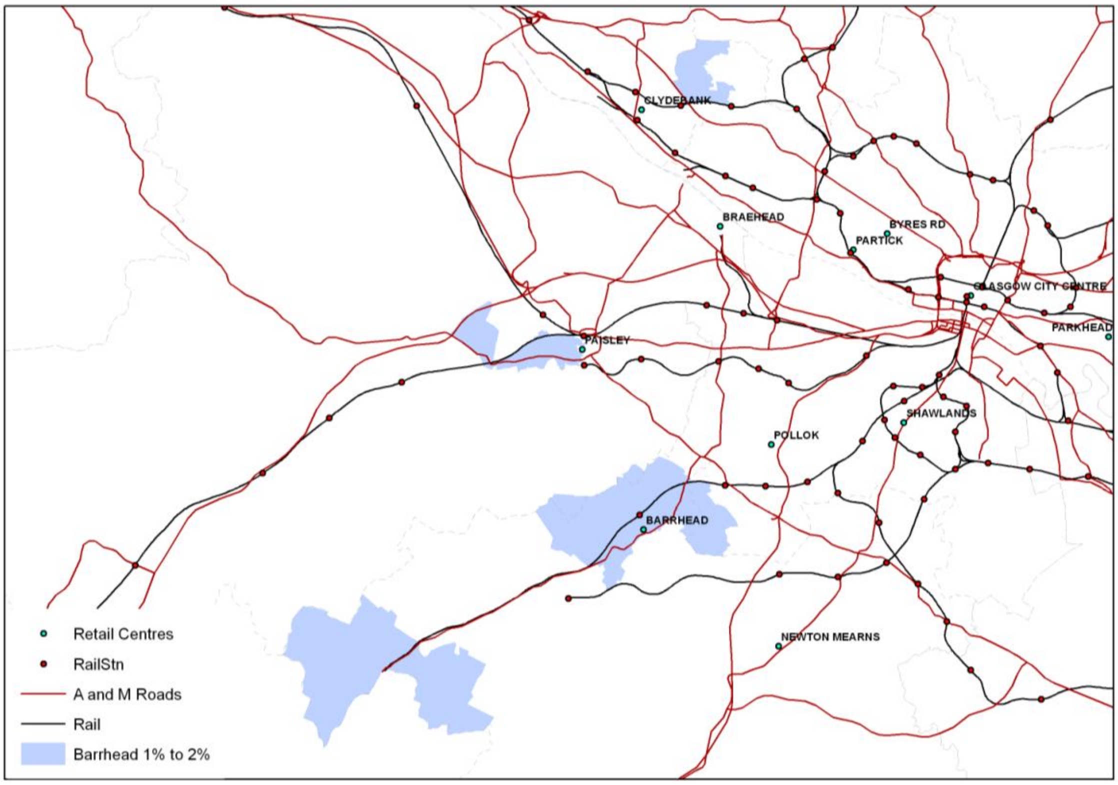
Glasgow



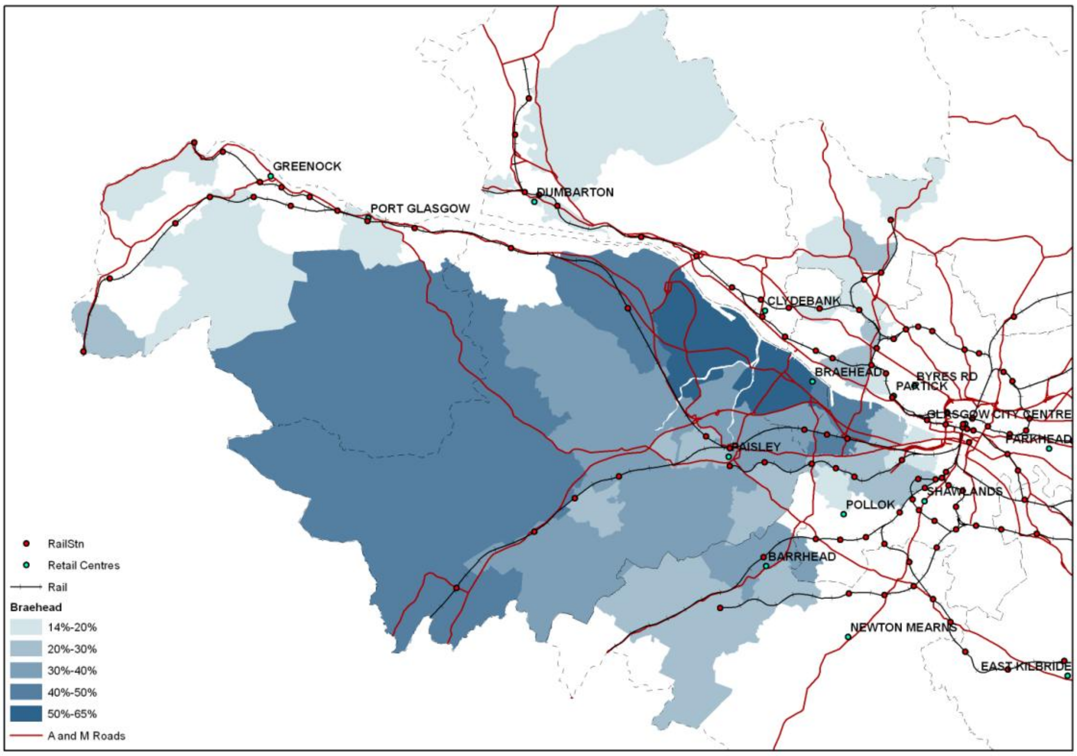
Airdrie



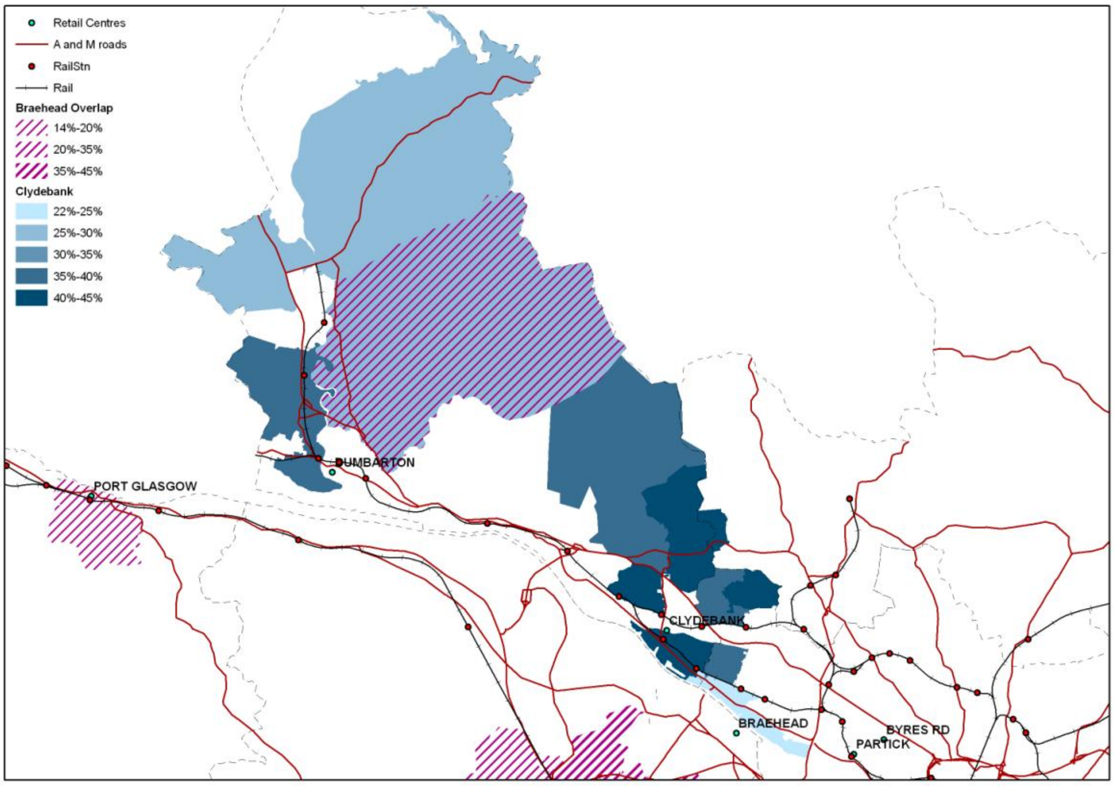
Barrhead



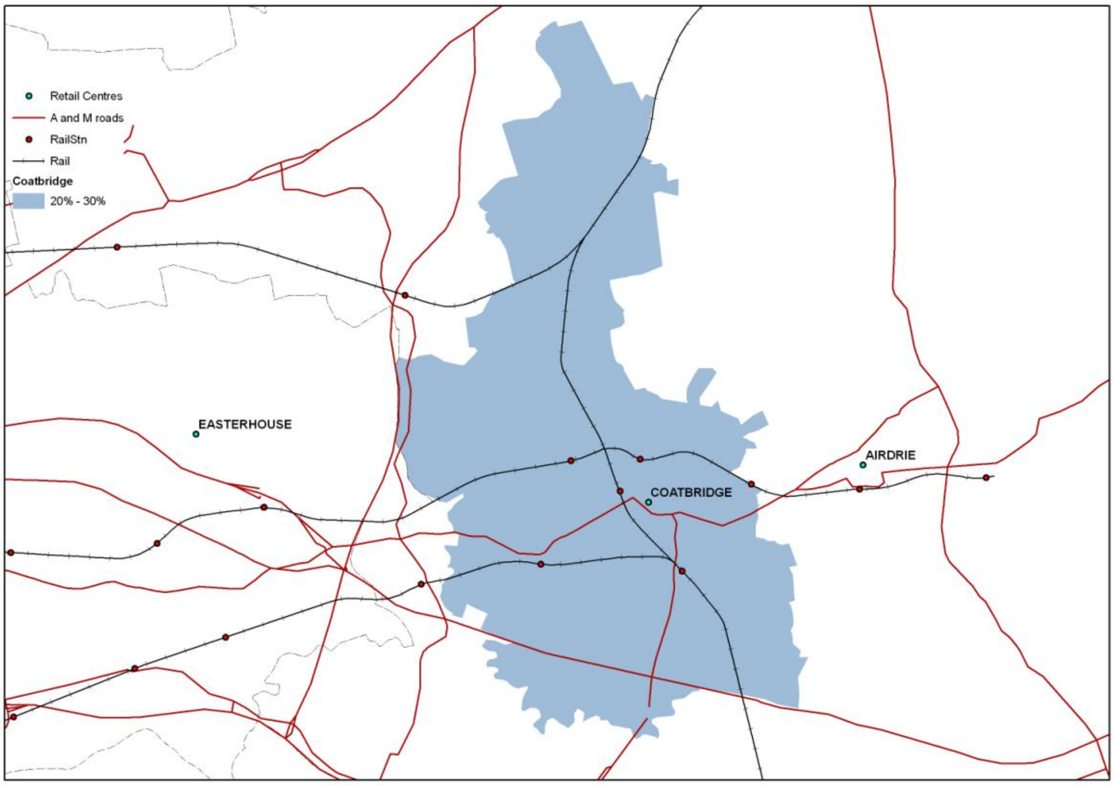
Braehead



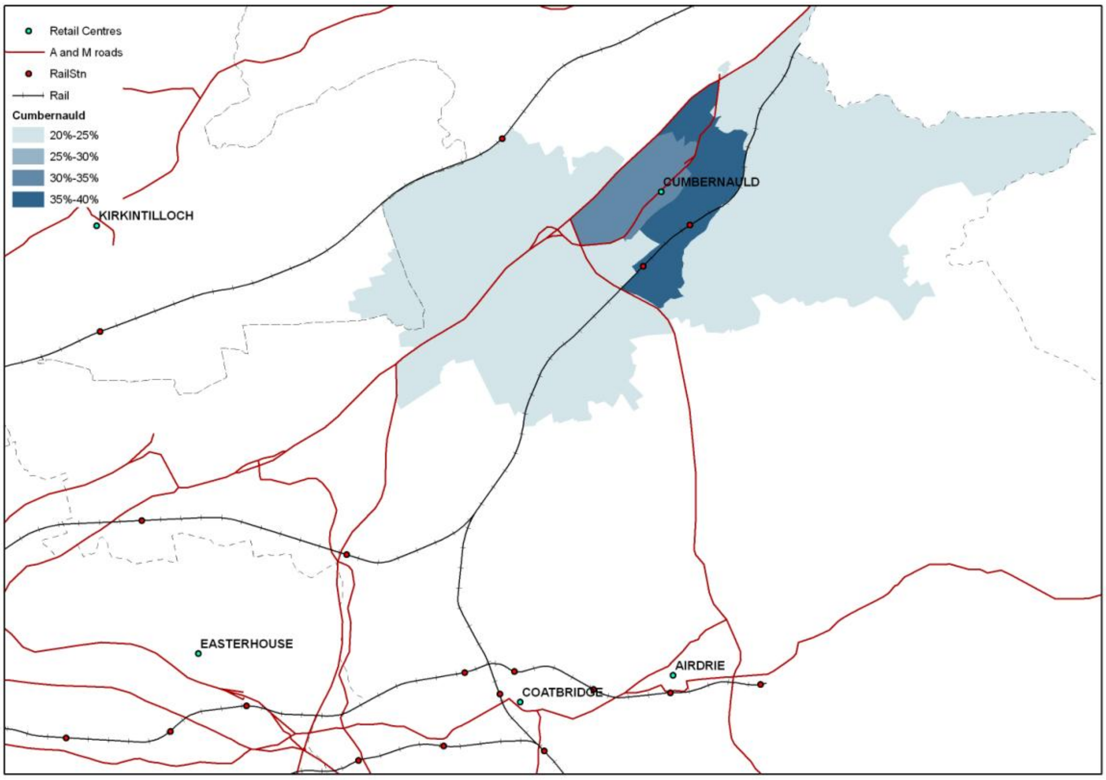
Clydebank



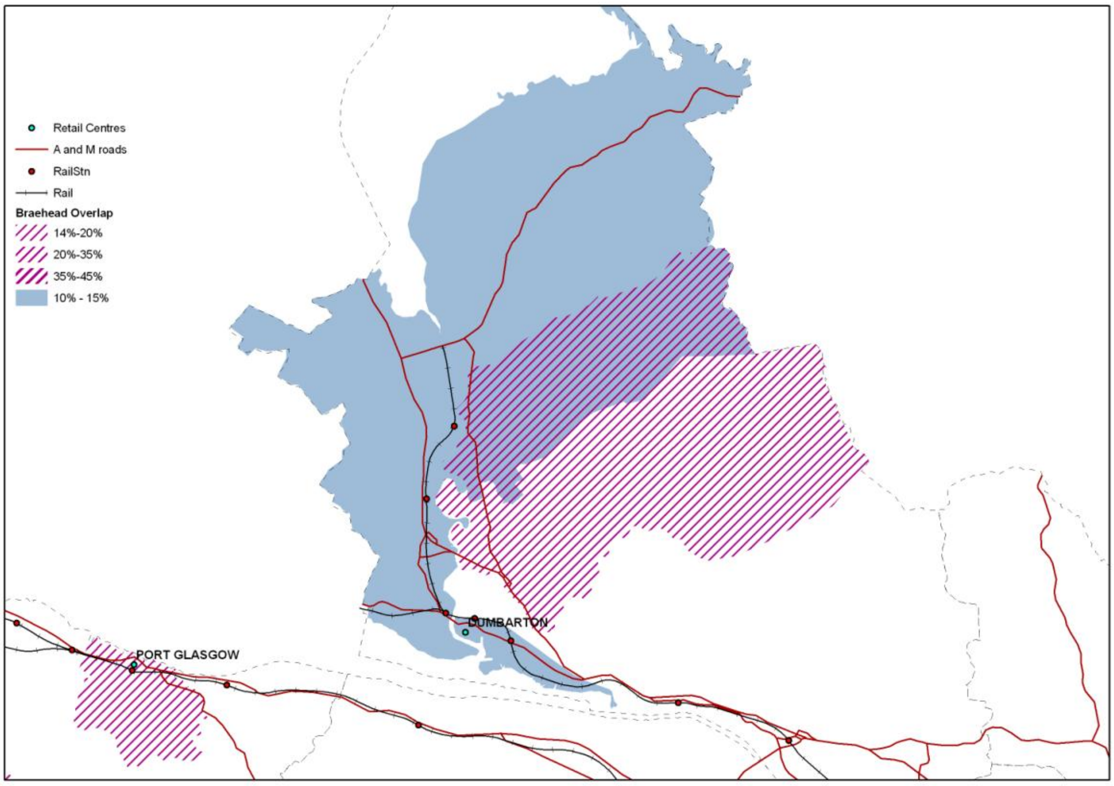
Coatbridge



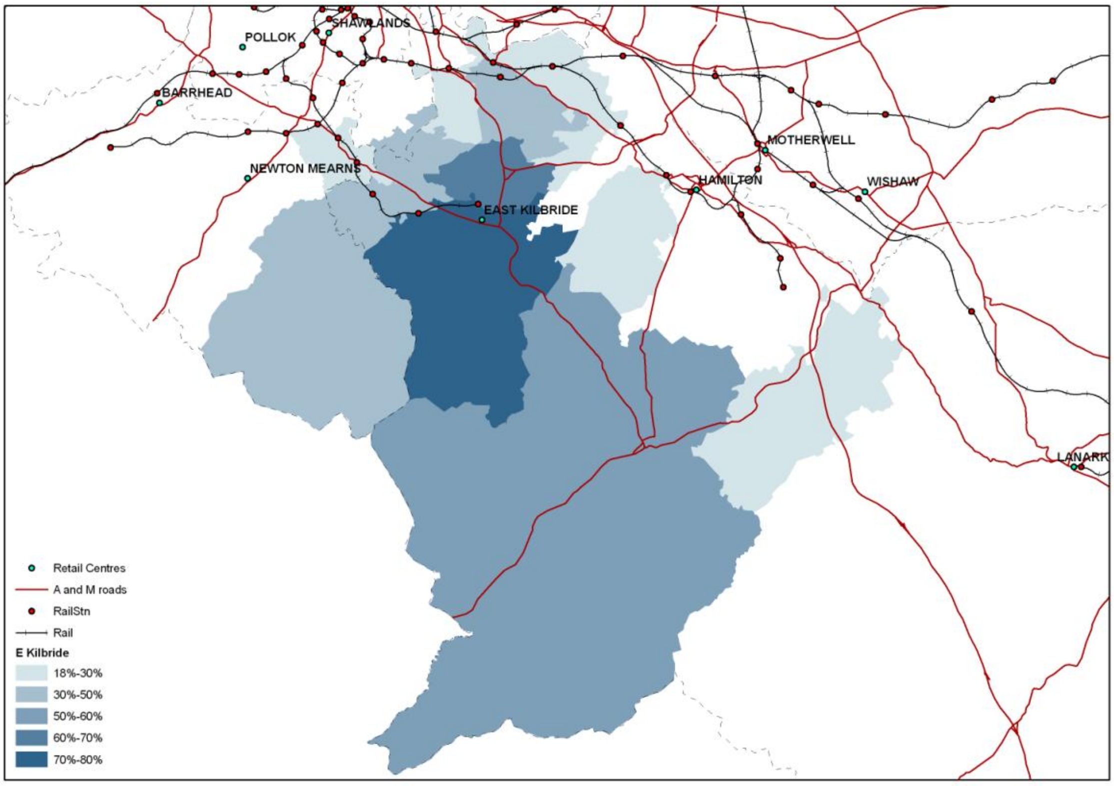
Cumbernauld



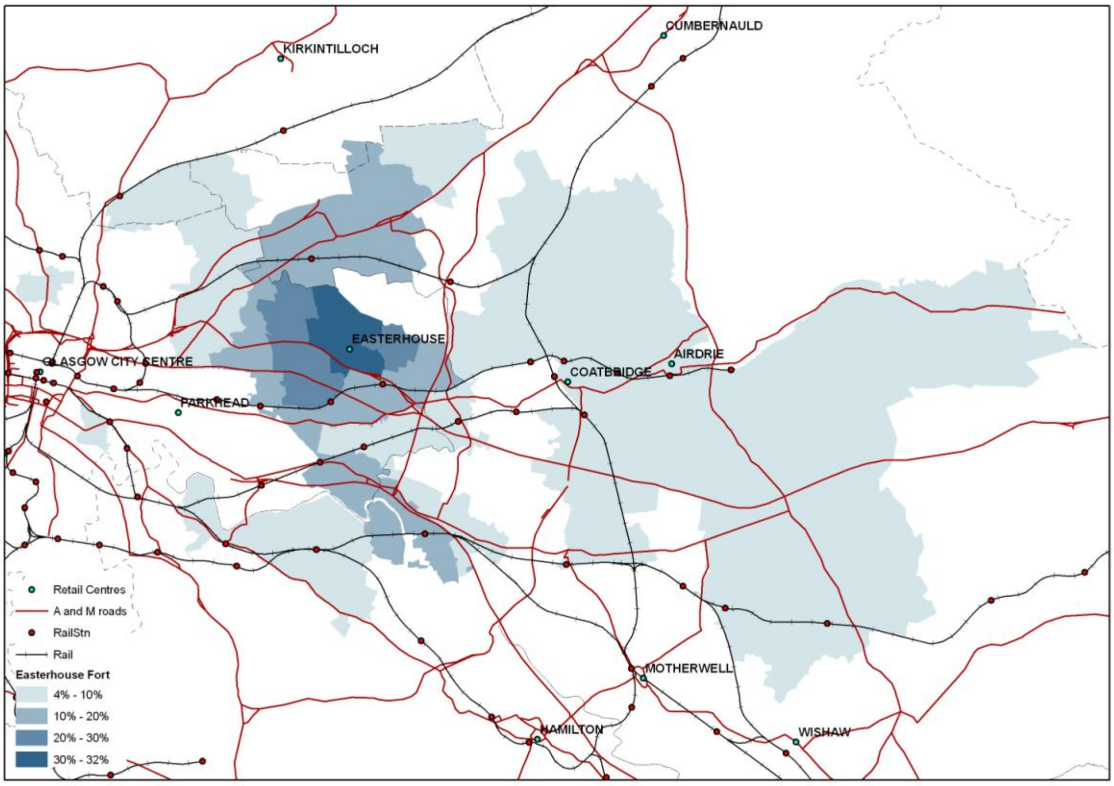
Dumbarton



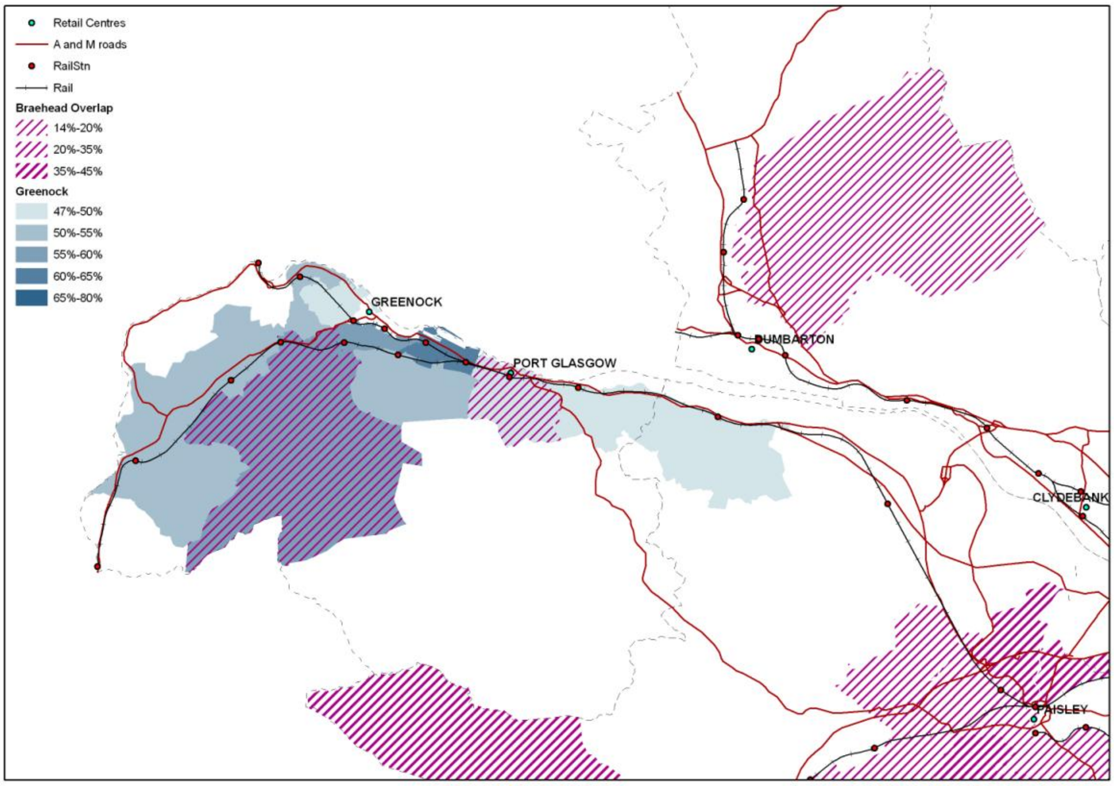
East Kilbride



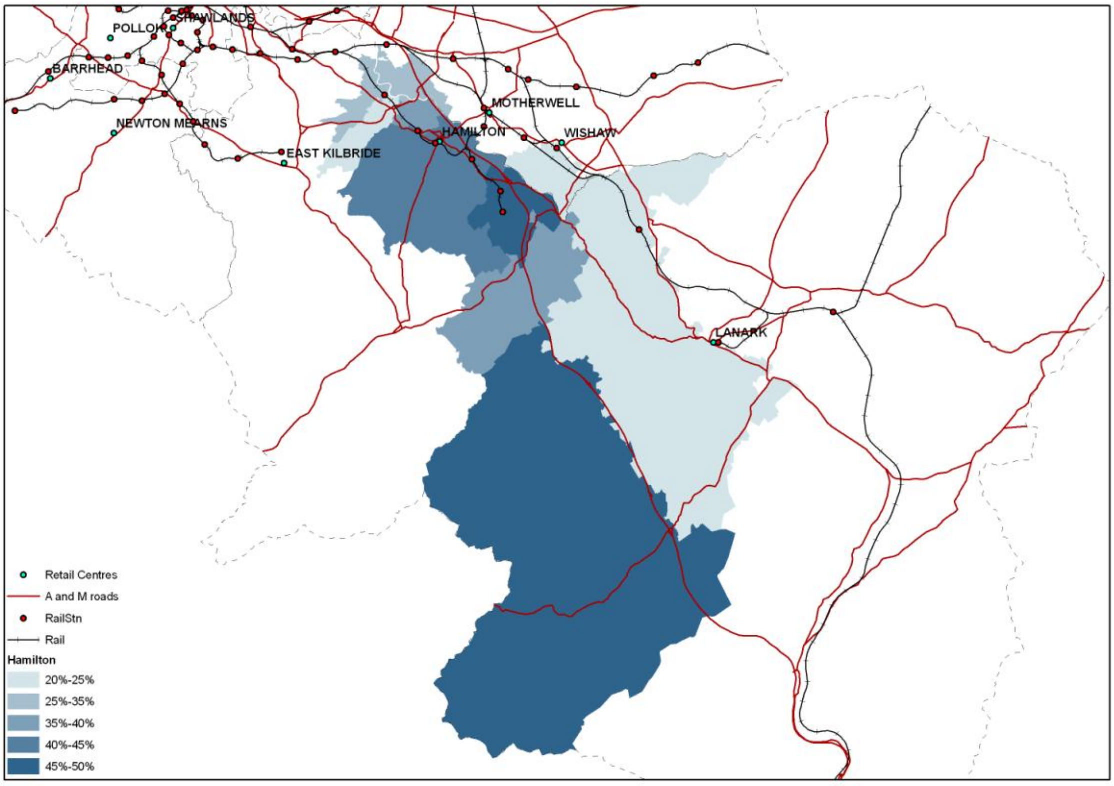
Easterhouse Fort



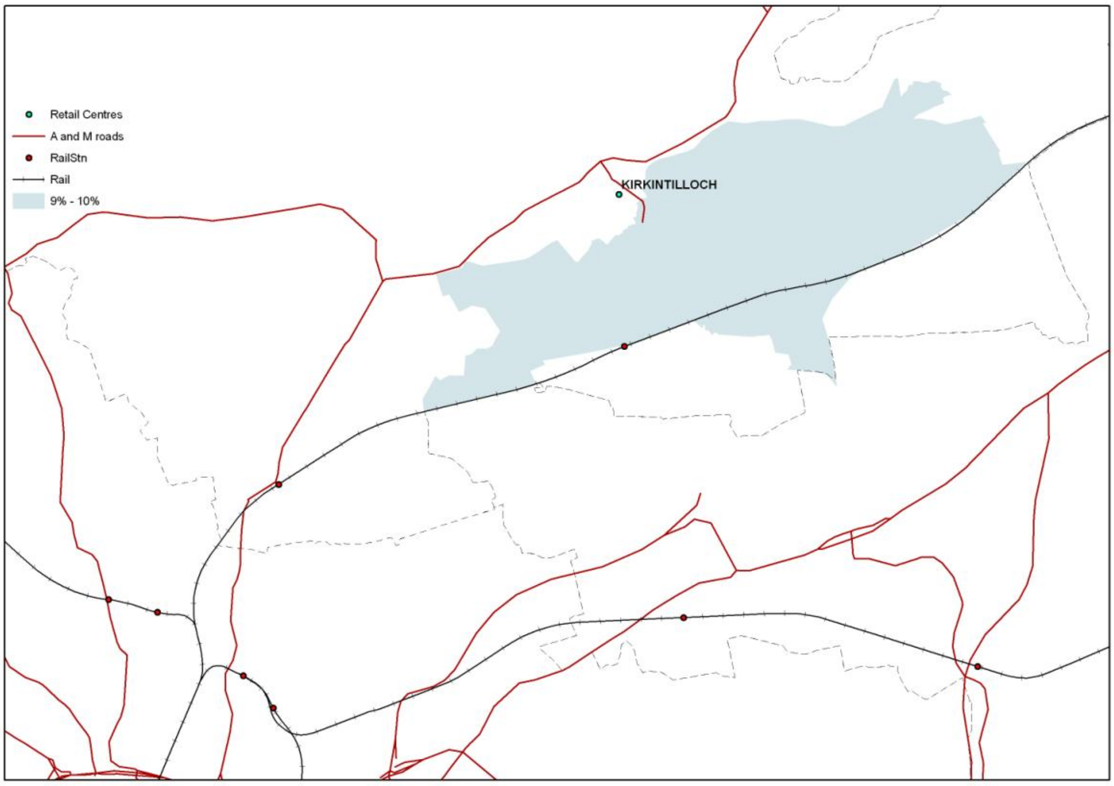
Greenock



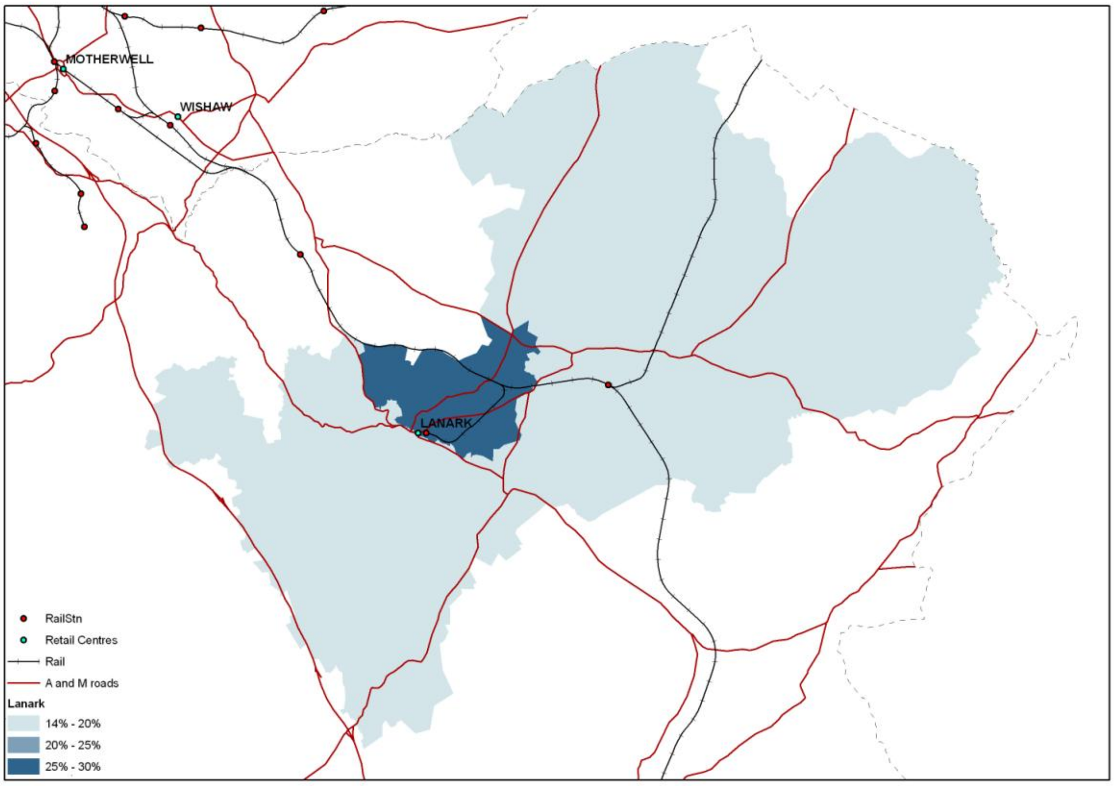
Hamilton



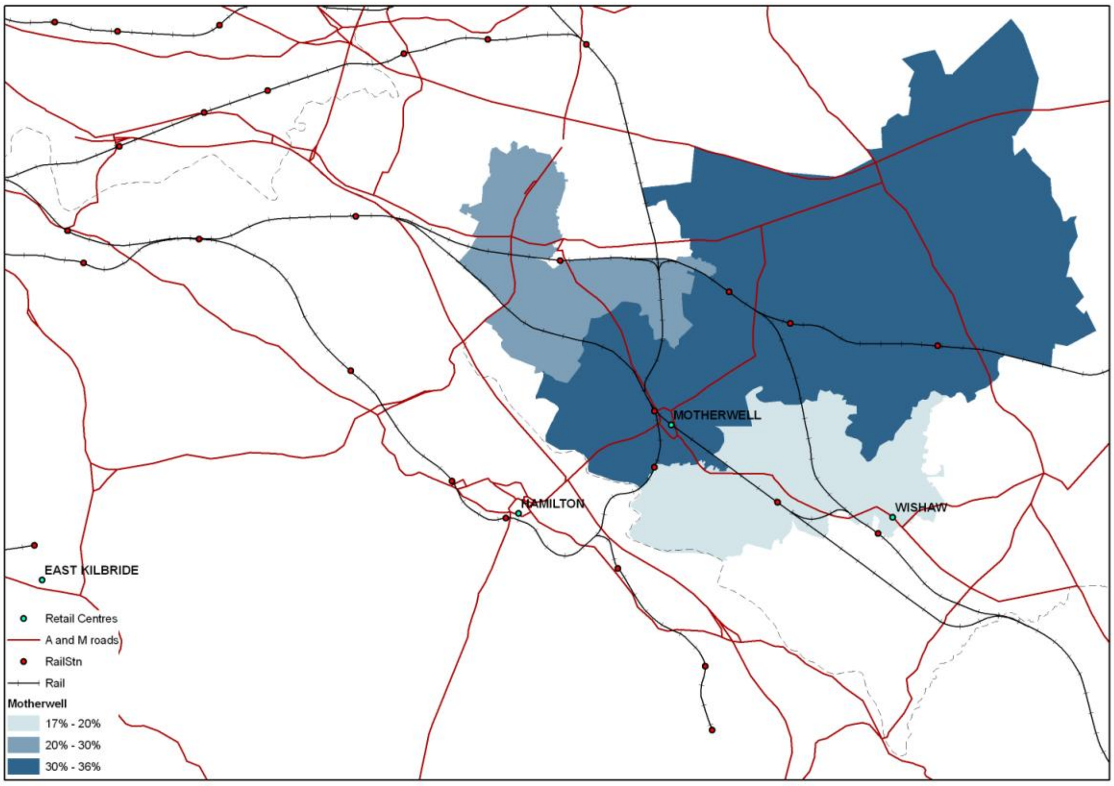
Kirkintilloch



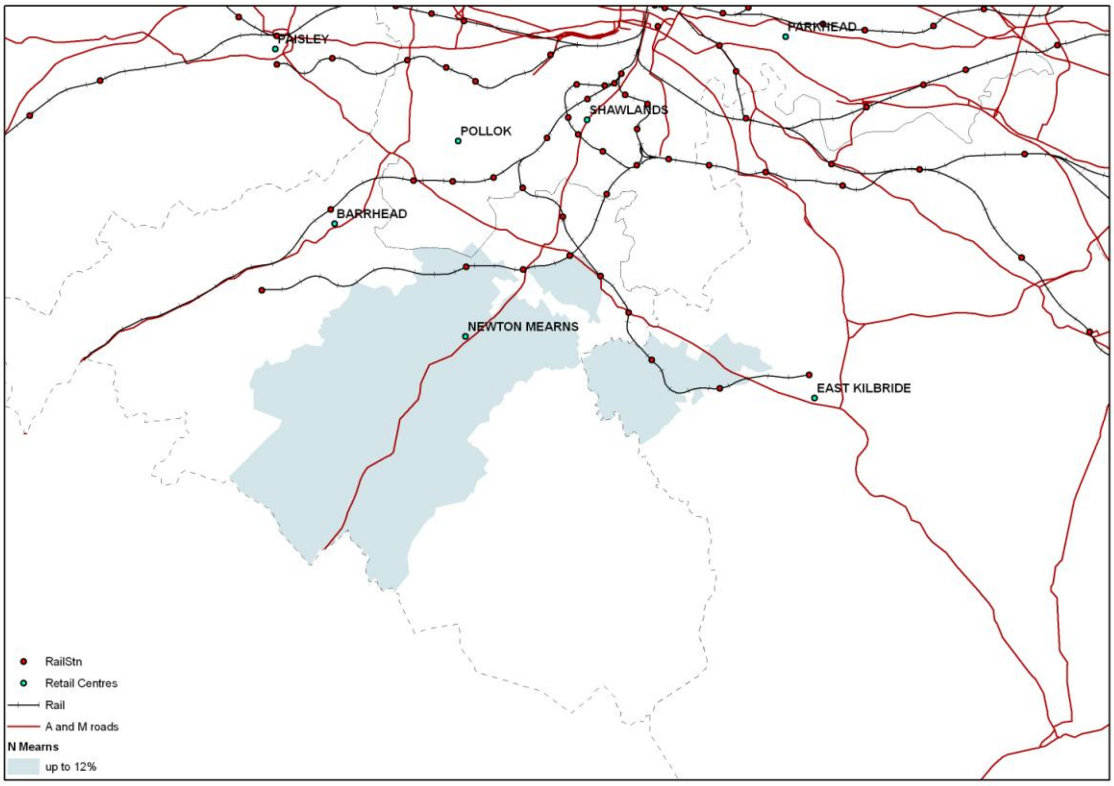
Lanark



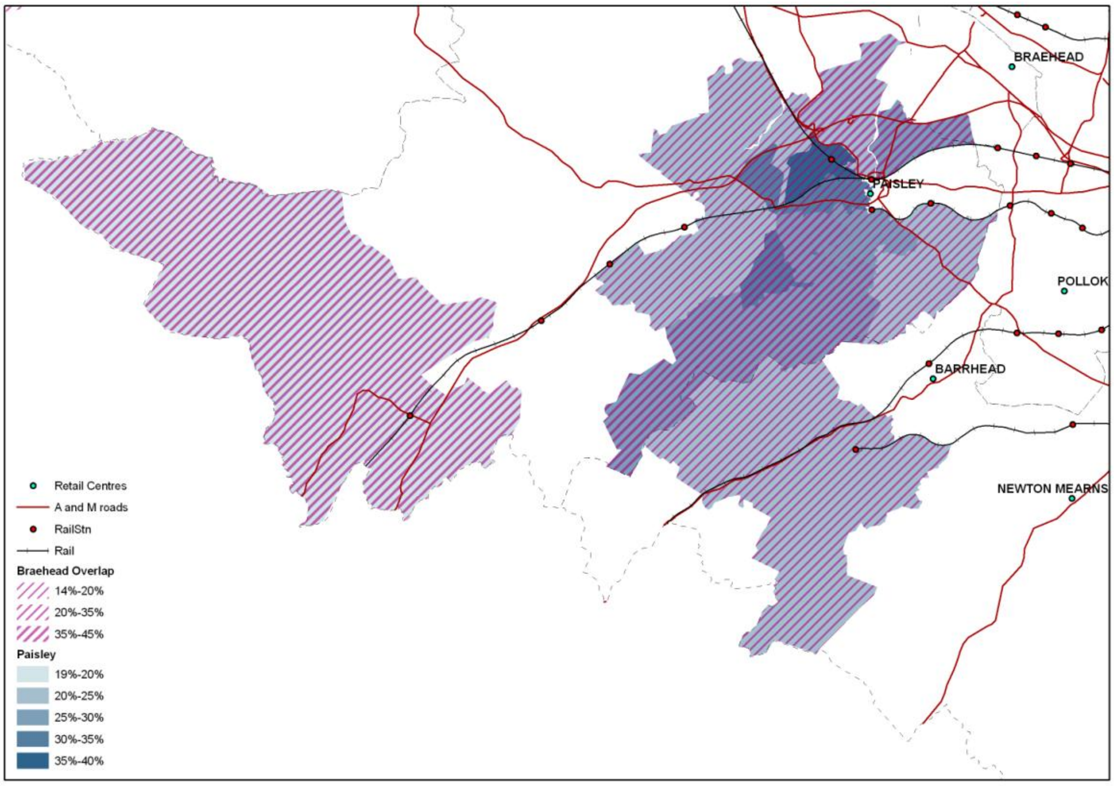
Motherwell



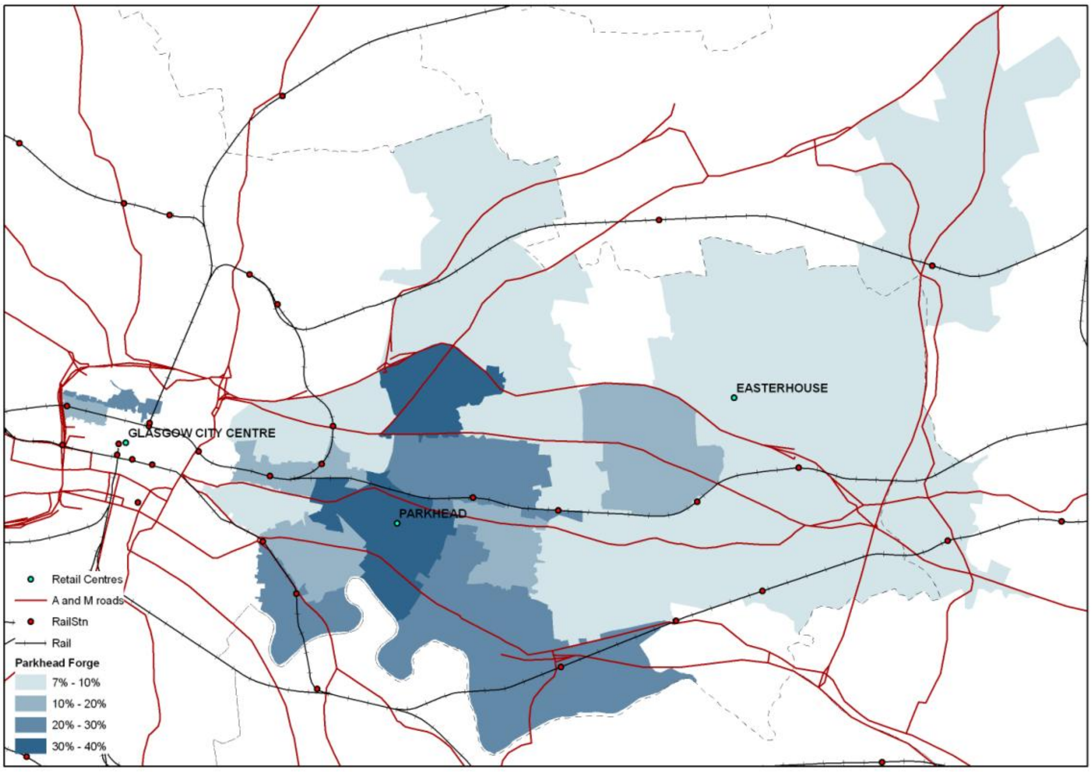
Newton Mearns



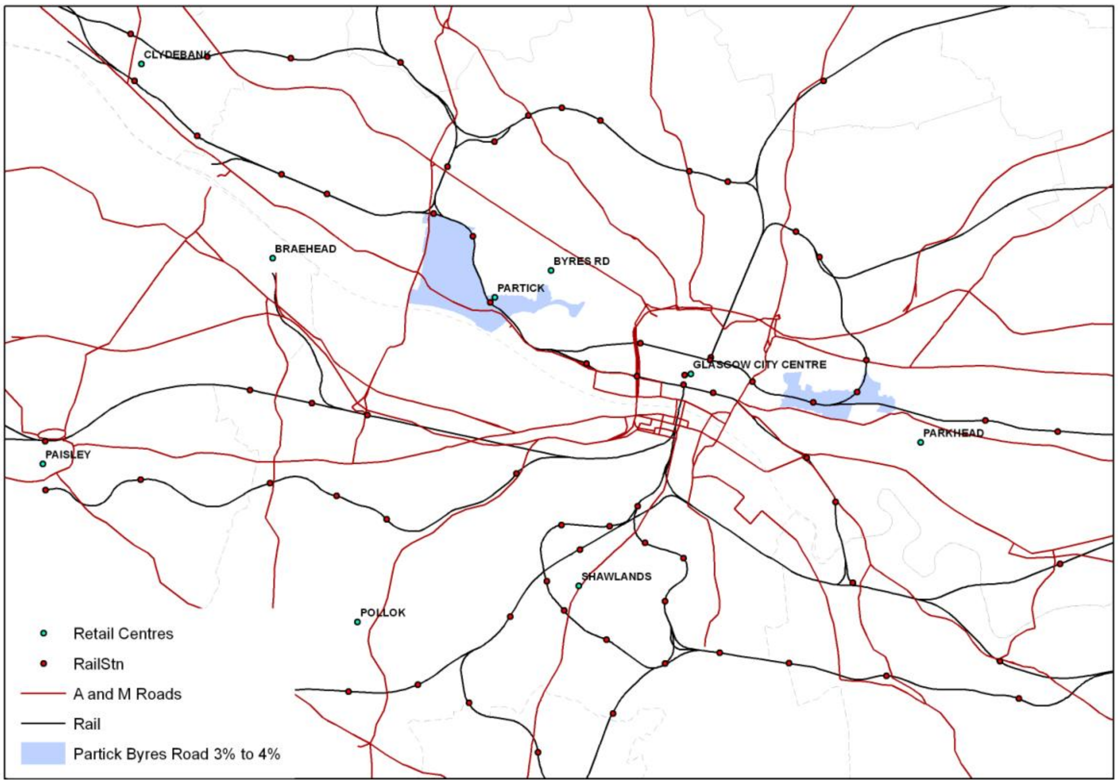
Paisley



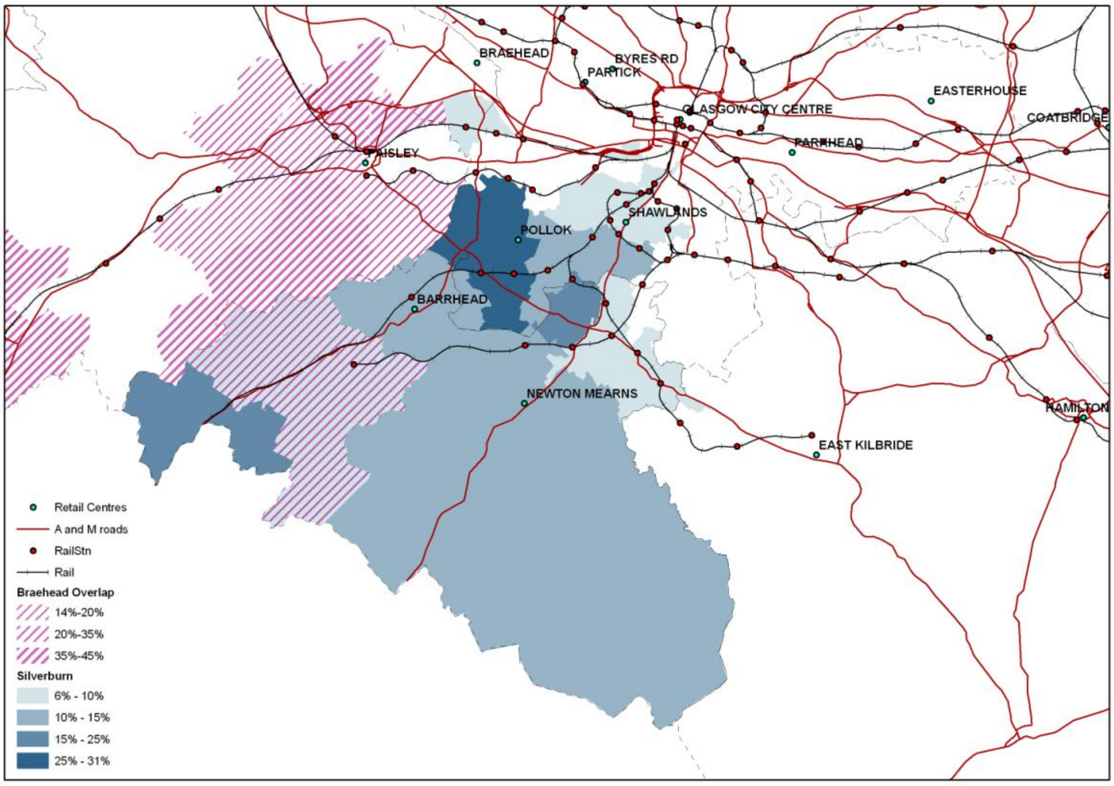
Parkhead Forge



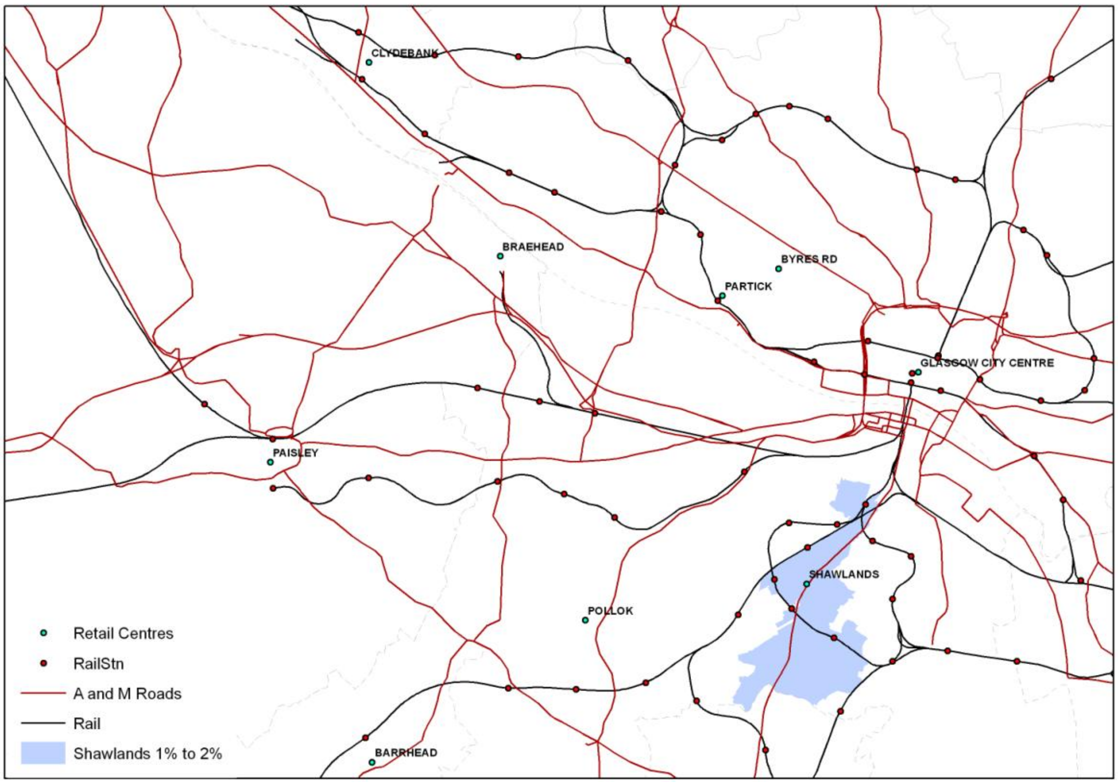
Partick Byres Road



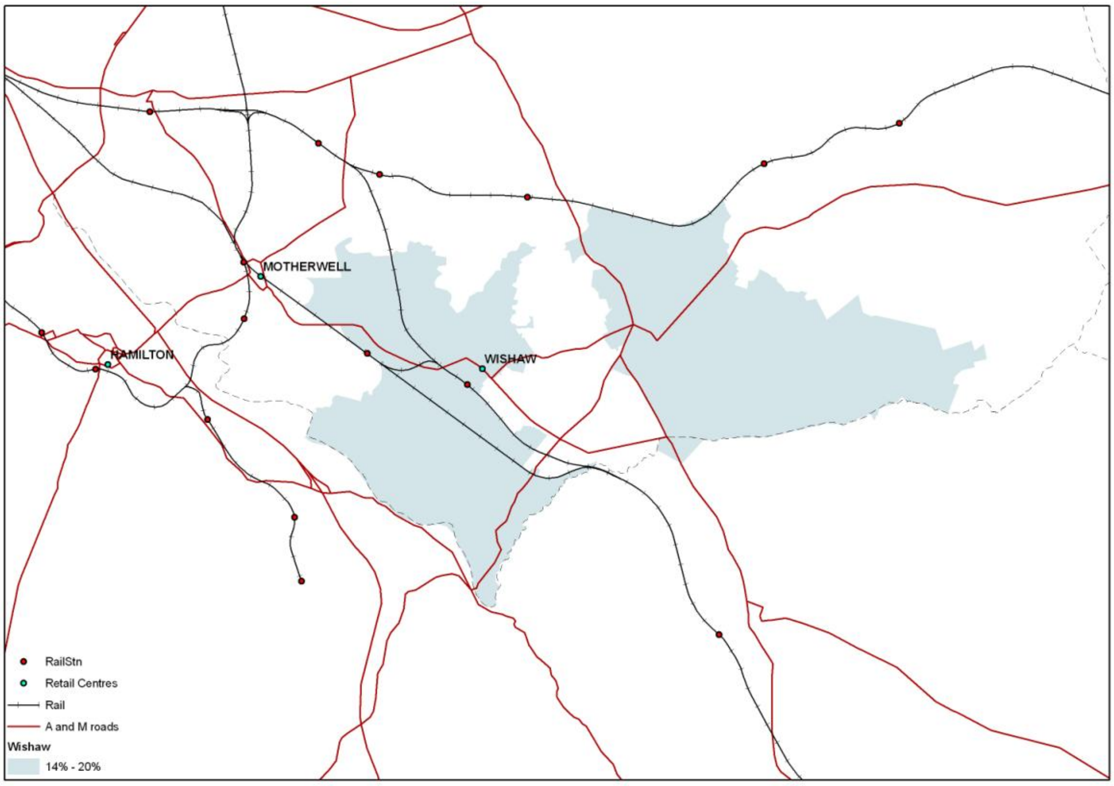
Pollok Silverburn



Shawlands



Wishaw



Appendix B: Convenience Goods Rankings

Store	**Location**	Shopping Population	Catchment Population
ASDA	TORYGLEN	48,103	293,460
ASDA	HAMILTON	46,428	449,069
ASDA	LINWOOD	39,911	308,931
ASDA	GOVAN	38,714	449,252
ASDA	CLYDEBANK	38,259	225,266
TESCO-EXTRA	SILVERBURN	37,606	528,237
ASDA	MOTHERWELL	35,988	241,539
ASDA	FORGE PARKHEAD	34,611	238,400
ASDA	COATBRIDGE	33,719	214,867
ASDA	DUMBARTON	33,550	195,306
TESCO	GREENOCK	32,588	200,905
TESCO-EXTRA	ST ROLLOX	28,081	303,804
ASDA	TRYST ROAD, GLASGOW	27,823	310,267
ASDA	ROBROYSTON	26,614	243,819
TESCO-EXTRA	FARADAY R P , COATBRIDGE	26,369	316,353
SAINSBURY'S	BRAEHEAD S C	25,277	560,673
SAINSBURY'S	EAST KILBRIDE S C	25,049	302,494
MORRISONS	CROW ROAD, GLASGOW	24,886	328,155
ASDA	NEWTON MEARNS	24,560	193,610
ASDA	CLYDEVIEW, BLANTYRE	24,048	288,383
ASDA	BEARSDEN	22,857	227,493
MORRISONS	RIVERFORD ROAD, GLASGOW	22,840	227,093
TESCO-EXTRA	CUMBERNAULD	22,558	205,951
ASDA	BISHOPBRIGGS	21,444	164,266
SAINSBURY'S	DARNLEY	21,377	334,344
TESCO-EXTRA	SHETTLESTON	21,329	238,090
SAINSBURY'S	HAMILTON	20,937	403,949
MORRISONS	AIRDRIE	20,464	176,765
ASDA	SUMMERSTON, GLASGOW	19,663	135,591
TESCO	MILNGAVIE	18,776	152,637
MORRISONS	EAST KILBRIDE	17,987	121,072
MORRISONS	JOHNSTONE	16,819	91,194
TESCO-EXTRA	WISHAW	16,526	187,268
TESCO	NORTH VENNEL	16,337	123,090
MORRISONS	BELLSHILL	16,176	144,147
MORRISONS	HAMILTON	15,802	262,382
MORRISONS	DUMBARTON	15,471	124,858
SAINSBURY'S	DRUMCHAPEL	14,281	244,969
MORRISONS	PAISLEY	14,254	185,562
TESCO-EXTRA	PORT GLASGOW	13,919	216,499
TESCO	MARYHILL	13,513	143,014
TESCO	CUMBERNAULD	12,657	71,896
MORRISONS	EAST KILBRIDE	12,650	130,213
MORRISONS	PARTICK	12,644	137,735
MORRISONS	CAMBUSLANG	12,616	138,648
MORRISONS	GREENOCK	12,217	123,307
TESCO	RENFREW	11,763	211,459
MORRISONS	CARDONALD	11,607	69,740
MORRISONS	WISHAW	11,449	141,069
TESCO	BARRHEAD	11,072	107,554
SAINSBURY'S	KIRKINTILLOCH	10,985	141,160
ASDA	NEWMAINS	10,738	159,843
MORRISONS	PAISLEY	10,348	62,534
MORRISONS	BAILLIESTON	10,084	114,723

Appendix C: Bulky Goods Rankings

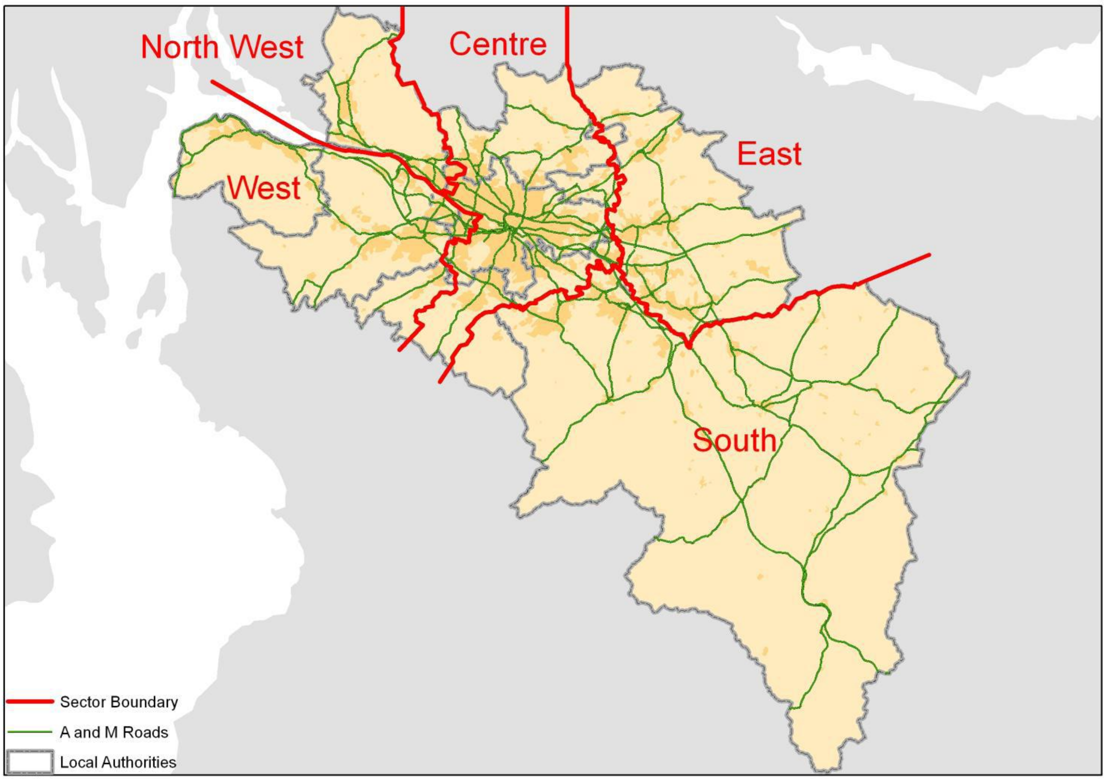
Park Name or Location	Shopping Population	Catchment Population
GLASGOW CENTRAL	395,504	3,038,098
BRAEHEAD RETAIL PARK AND SHOPPING CENTRE	205,715	1,989,413
FORGE RETAIL AND SHOPPING PARK	101,020	1,178,916
EAST KILBRIDE	85,480	813,168
HAMILTON	72,870	461,485
PAISLEY	50,408	489,188
KINGSGATE RETAIL PARK	49,416	393,963
GREENOCK	48,163	141,346
CLYDEBANK	47,024	442,320
GREAT WESTERN RETAIL PARK	46,373	478,797
BIRKENSHAW RETAIL PARK	37,502	647,457
BISHOPBRIGGS	37,442	319,221
COATBRIDGE	33,106	423,651
STRATHKELVIN RETAIL PARK	29,812	220,170
UDDINGSTON	29,533	602,162
DRUMCHAPEL	26,909	346,690
CUMBERNAULD	21,913	166,223
AULDHOUSE RETAIL PARK	21,776	286,135
GLASGOW FORT SHOPPING PARK	16,573	670,218
ABBOTSINCH RETAIL PARK	16,551	344,439
FARADAY RETAIL PARK	16,147	166,574
MOTHERWELL	15,224	286,696
DARNLEY	14,772	279,339
RENFREW	13,235	427,528
DUMBARTON	12,975	107,737
WISHAW	12,131	194,038
LANARK	10,369	77,664
AIRDRIE	10,002	83,338
SILVERBURN	9,790	422,408
GALLAGHER RETAIL PARK	9,130	276,807
PALACE GROUNDS SHOPPING PARK	7,773	220,085
HILLINGTON INDUSTRIAL ESTATE	7,586	434,999
HAMILTON RETAIL PARK	6,094	214,349
ST JAMES RETAIL PARK	5,258	73,625
SOLARTRON RETAIL PARK	4,348	232,074
LINWOOD	4,216	201,046
CALEDONIAN RETAIL PARK	3,647	112,328
TANNOCHSIDE RETAIL PARK	3,629	252,392
WESTWAY RETAIL PARK	3,240	74,260
CLYDEBANK RETAIL PARK	3,216	194,228
RENFREW RETAIL PARK	2,679	186,888
AIRDRIE RETAIL PARK	2,447	65,155
ANNIESLAND	1,945	85,637
PARTICK	1,435	68,723
SPRINGBURN	1,378	75,911
ROBROYSTON	1,205	53,413
MILNGAVIE	1,028	30,466
BRAIDFUTE RETAIL PARK	983	33,421
RUTHERGLEN	896	53,071
LARKHALL	892	41,759
ANNIESLAND RETAIL PARK	807	41,112
KIRKINTILLOCH	806	46,984

BARRHEAD	805	53,375
SHAWLANDS	780	64,529
GOVAN	675	38,174
AVENUE AT MEARNS	581	34,556
JOHNSTONE	568	18,704
KINGSWAY RETAIL PARK	549	60,339
CARLUKE	527	27,232
EASTERHOUSE	523	28,089
WEST END RETAIL PARK	498	24,791
BEARSDEN	435	18,937
BLANTYRE	392	54,407
BELLSHILL	356	37,535
MARYHILL SHOPPING CENTRE	314	5,806
BRAIDHURST INDUSTRIAL ESTATE	278	38,535
ALEXANDRIA	183	15,703
SHETTLESTON	168	6,900
CASTLEMILK	101	9,086
TORYGLEN	74	5,294

Appendix D: Convenience and Bulky Goods Retailing Patterns

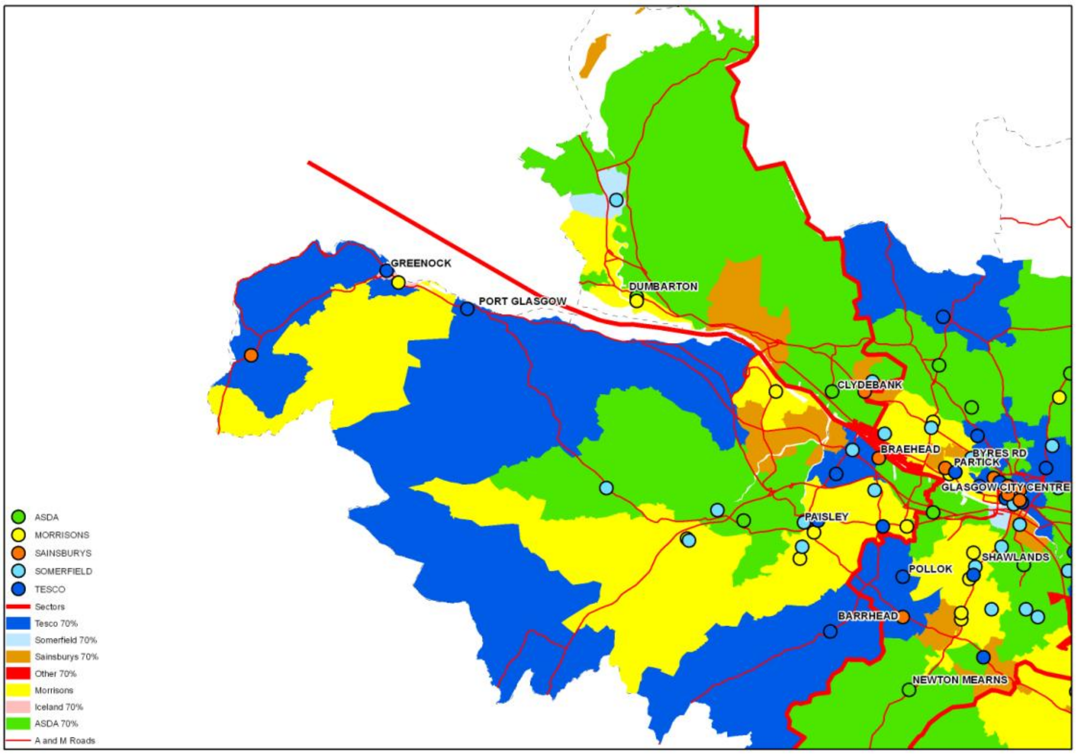
For bulky goods and convenience retailing, a sectoral approach rather than a centres based approach has been taken to the spatial distribution of retailing. The SDP area has been broken into five sectors, as shown below:

- North West
- West
- Centre
- East
- South

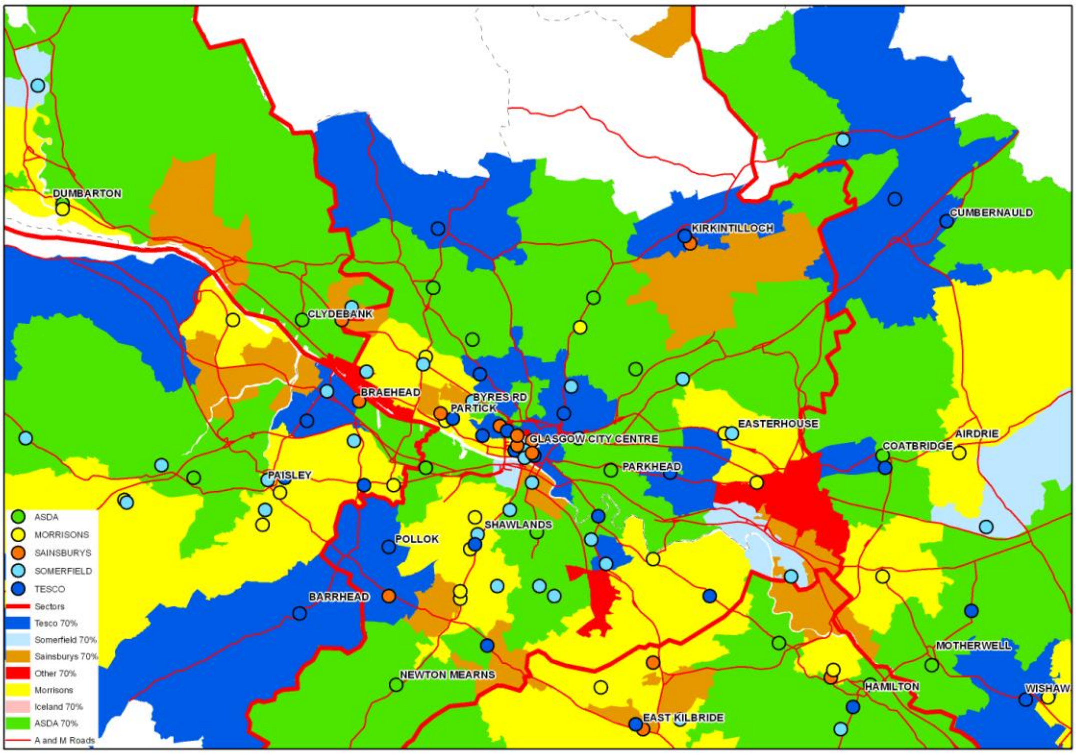


Within these sectors, the dominant catchments, market shares and extent of competition are shown spatially in the following maps.

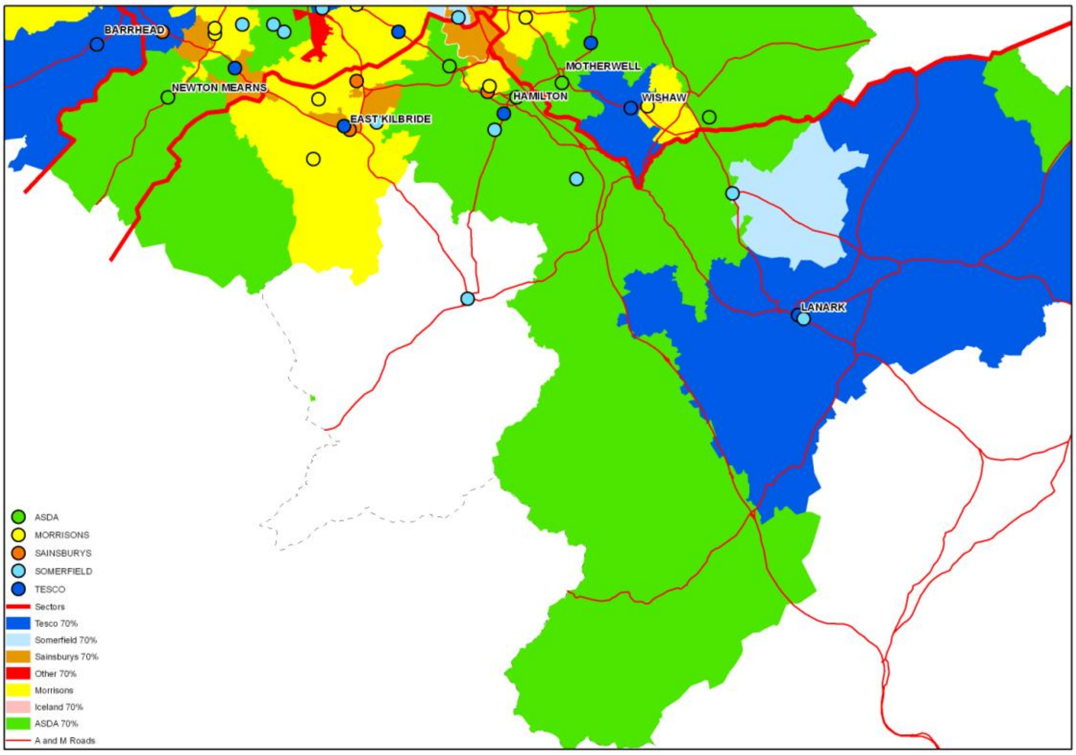
Convenience Retail Market Share by Retailer: West and Northwest



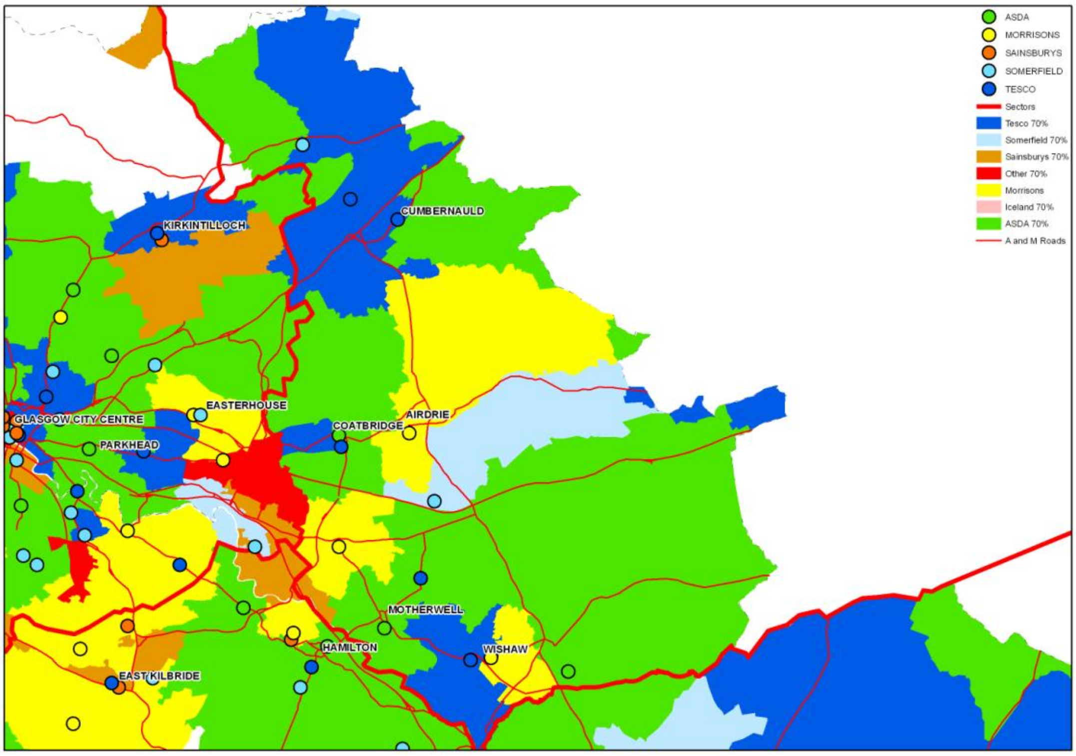
Convenience Retail Market Share by Retailer: Centre



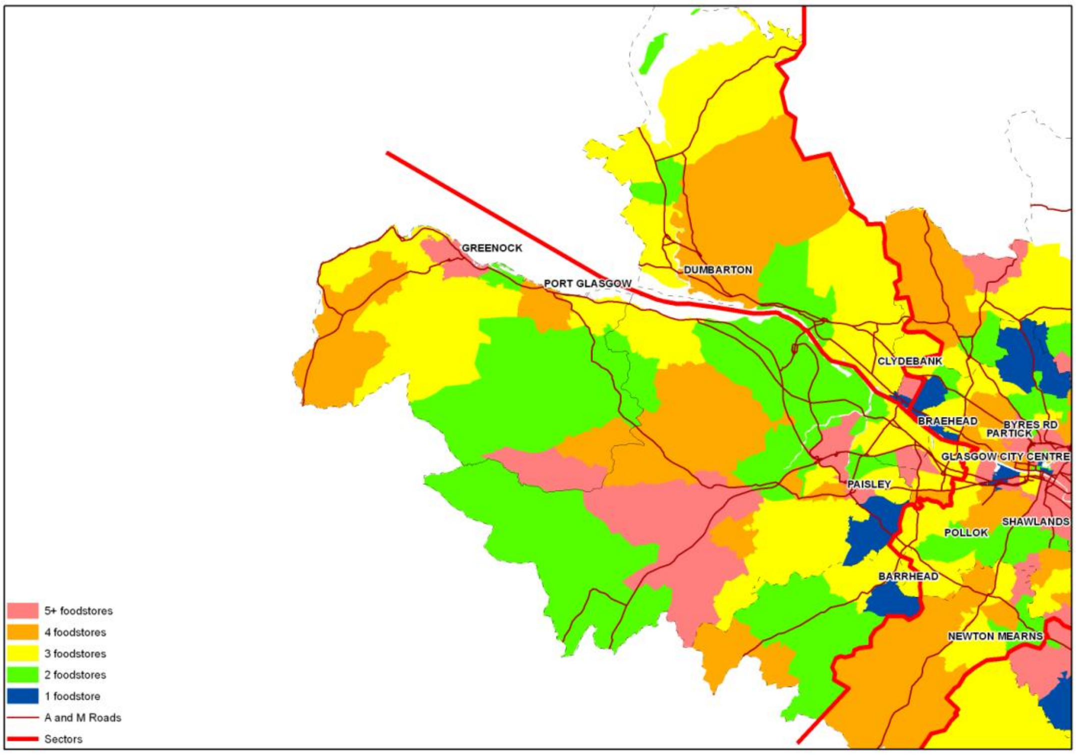
Convenience Retail Market Share by Retailer: South



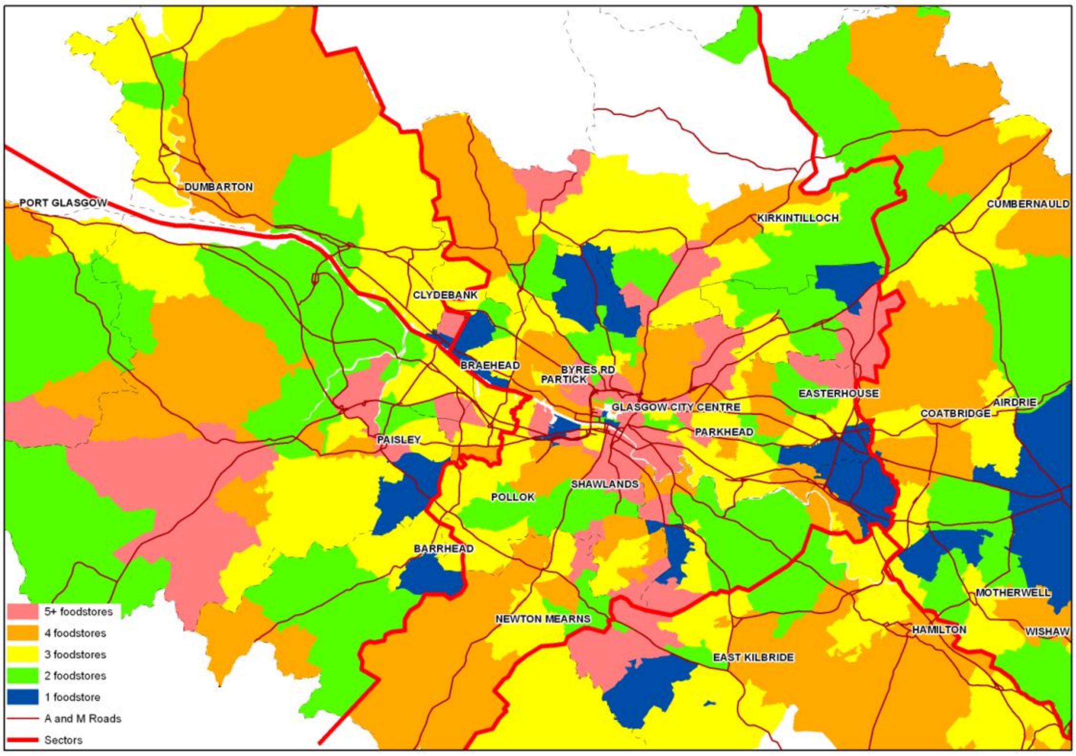
Convenience Retail Market Share by Retailer: East



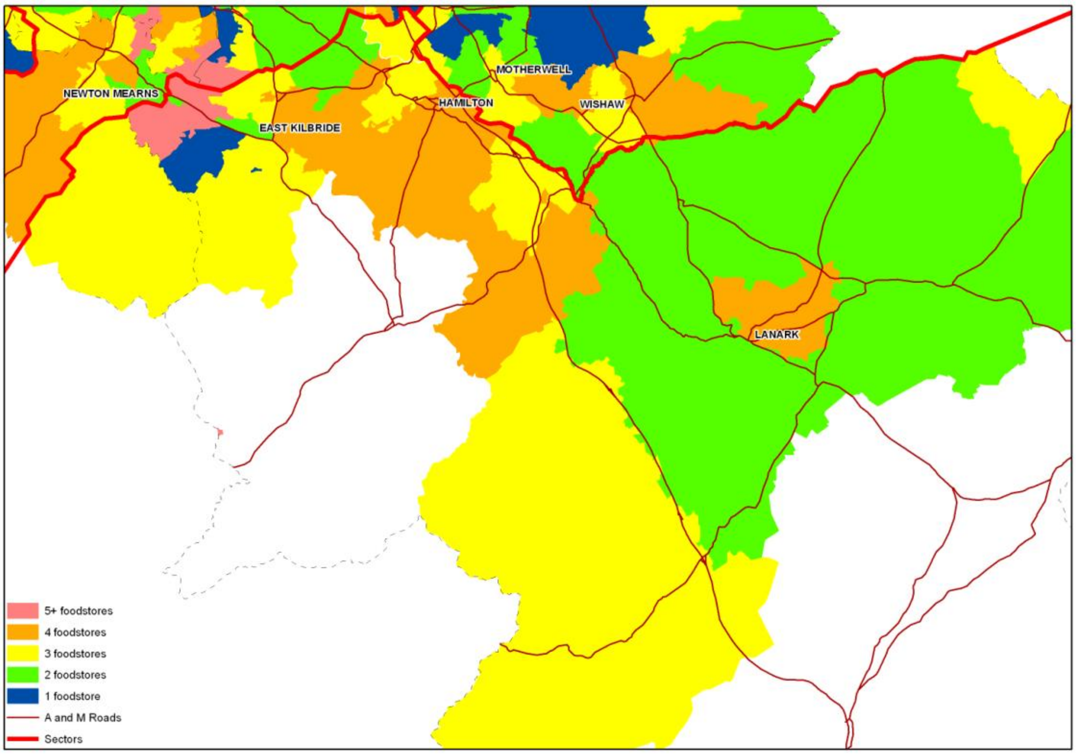
Convenience Retail Coverage and Competition: West and Northwest



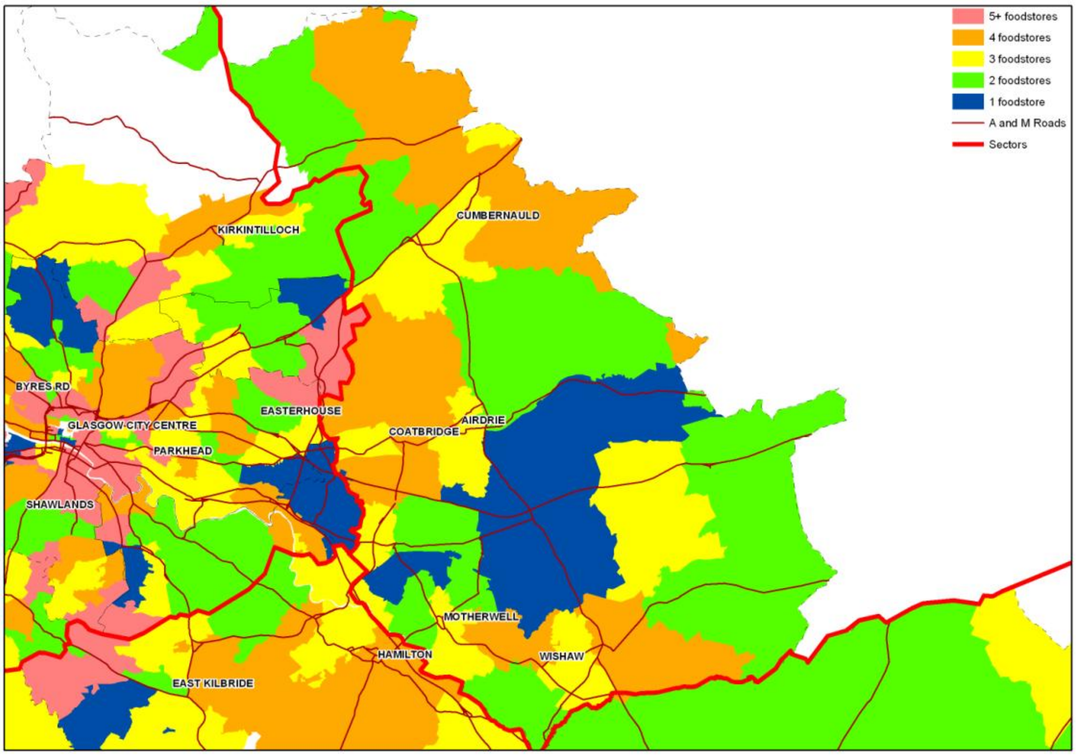
Convenience Retail Coverage and Competition: Centre



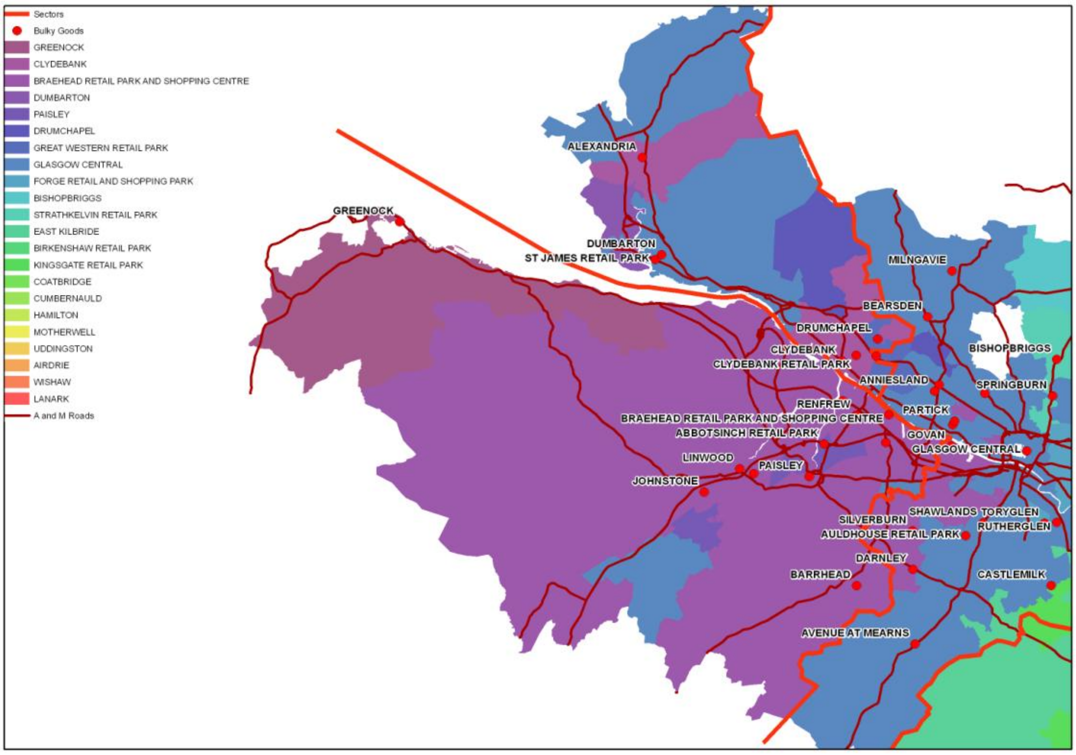
Convenience Retail Coverage and Competition: South



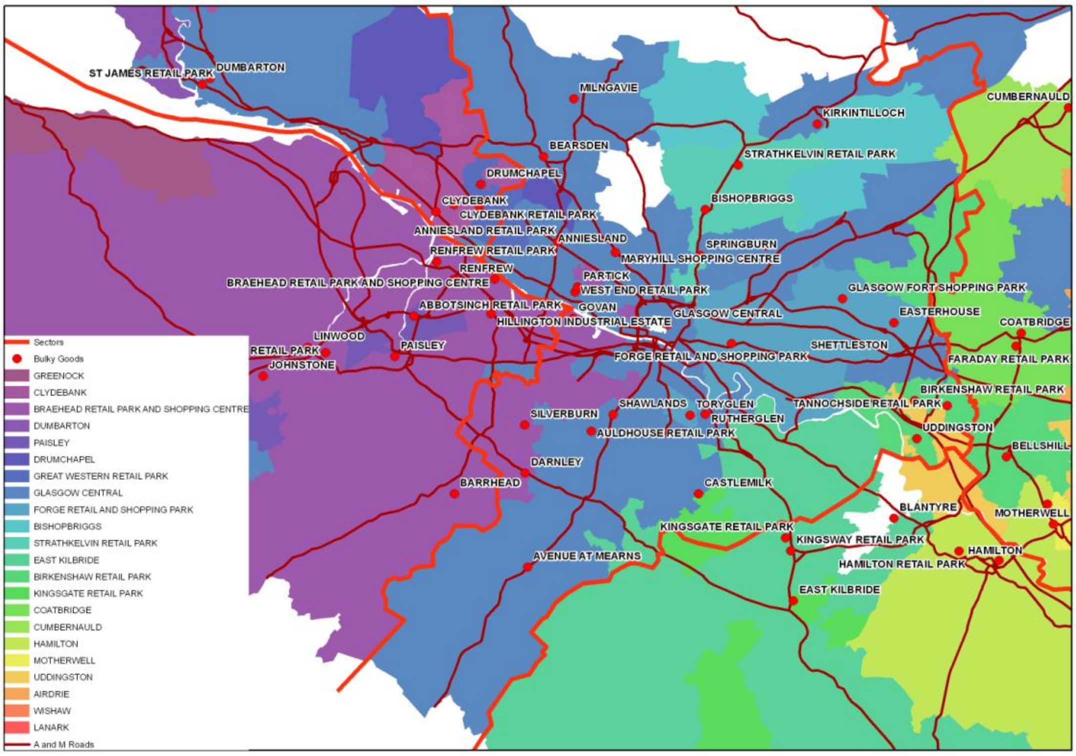
Convenience Retail Coverage and Competition: East



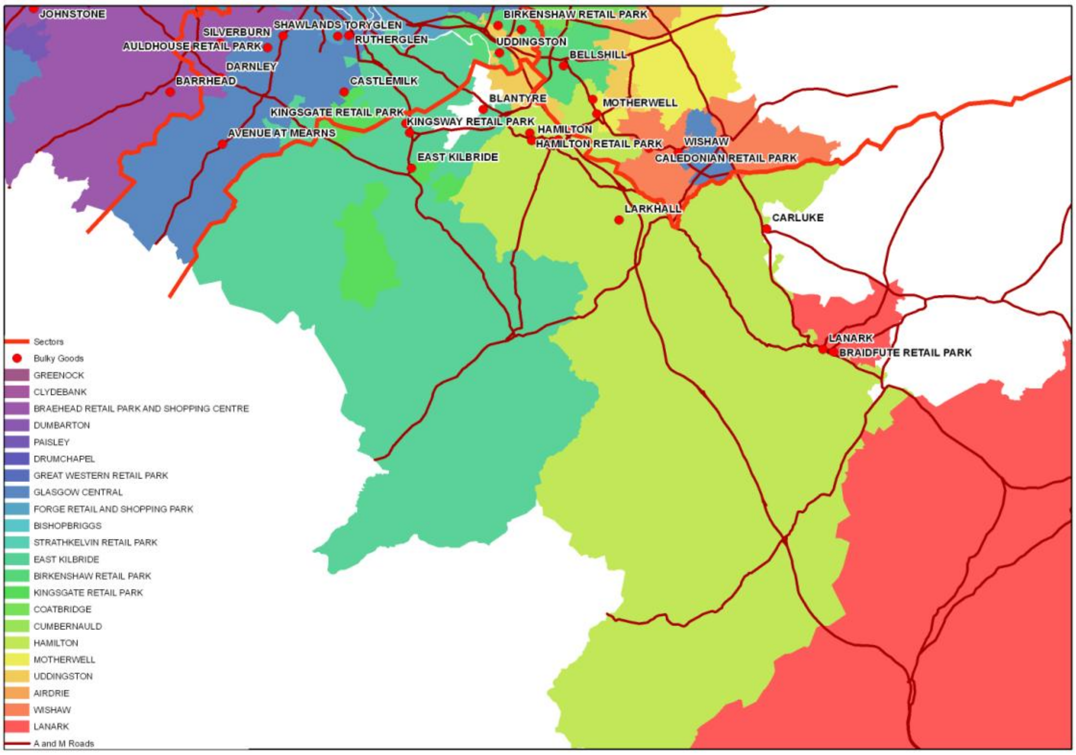
Dominant bulky goods catchments: West and North West



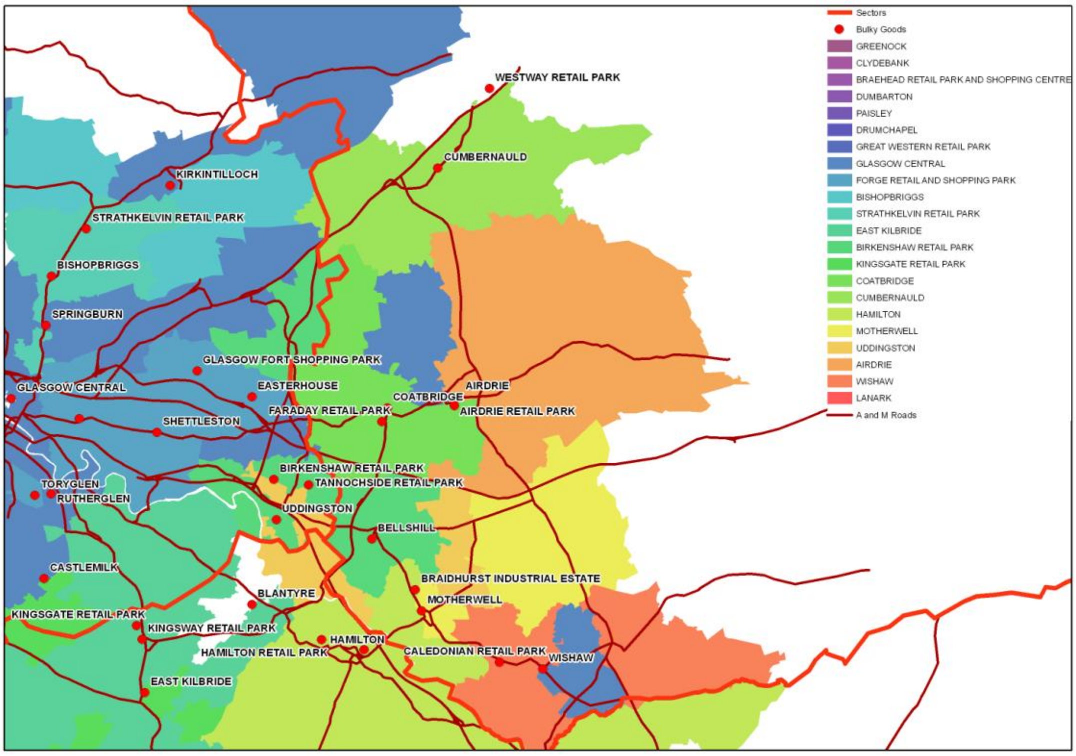
Dominant bulky goods catchments: Centre



Dominant bulky goods catchments: South



Dominant bulky goods catchments: East



Appendix E: Data Sources and References

General

Scottish Planning Policy (2009)

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