

Glasgow City Region



Glasgow City Region Study 2024- Retail

Final report

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Ryden

In association with Roderick MacLean Associates Ltd

Executive Summary

Consultancy brief

1. This report assesses the supply and demand for retail land and property in the Glasgow City Region up to 2037. It presents an evidence-based strategic overview on retailing linking the constituent local planning authority areas of the Glasgow City Region. Evidence in the study will assist the production of local development plans in these areas and inform Evidence Reports underpinning preparation of the LDPs.

Population and retail expenditure projections

2. The current population of the City Region is just over 1,856,200. Projected population growth is minimal at 0.7% for the five-year period 2024-29 and also 0.7% for the eight-year period 2029-37 with a total population of nearly 1,883,000 by 2037.

3. The convenience retail expenditure potential of the residents of the City Region is £4,671 million currently and projected to fall by 1% to 2029 followed by negligible change from 2029-37. The comparison retail expenditure potential of the residents of the City Region is £4,703 million at present and projected to increase by 3% to 2029 then by 2% from 2029-37. These figures exclude Special Forms of Trading (SFT) which is mainly internet based spending. The *comparison sector* is the main focus of this study.

Retail policy framework

4. NPF4 was adopted in February 2023. This national policy document strongly upholds the town centre first principle. It also introduces the principle of 20-minute neighbourhoods. Retail proposals are now only consistent with national policy if they are in town centres, or on sites identified for retailing on edge of centre locations, or in commercial centres identified to include retailing. All the LDPs require to be updated to accommodate the requirements of NPF4.

5. A Regional Spatial Strategy is to be prepared for the Glasgow City Region area. In preparing this, consideration will need to be given to whether the identification of a regional network of centres and associated strategy should be included.

National trends in retailing

6. The retail sector has undergone rapid change in response to market concentration and online shopping, accelerated over the past four years by a pandemic and an inflation-and-interest rate cycle which affected consumers, retailers and landlords/developers.

7. *Comparison shopping* is strategic and is forecast to grow, but demand for floorspace has fallen and the market is de-malling and diversifying as online shopping grows and multiple retailers have failed or consolidated, particularly larger department / variety stores. *Convenience shopping* is not strategic although the combined impact upon locations is of strategic interest. It is not growing but is highly competitive among brands at the local level.

8. Leisure uses remain part of the mix to drive footfall and consumer spend, although in comparison with the casual dining, cinemas and health clubs cycle of the past, the current market is narrower. It is focused either on prime locations or coffee and fast food chains.

9. The fundamental change to the Region's retail geography is that the loss of multiple retailers has migrated up the hierarchy into what were regarded as strategic centres, particularly those with covered malls. Glasgow City Centre is at the apex of the regional retail market and remains one of the UK's most investible centres. Many smaller towns have largely recovered to provide more localised shopping and services.

Glasgow City Region retail market

10. Retail is a significant economic sector for the Glasgow City Region. While nominal turnover growth has continued and is forecast to increase, employment has not grown and has contracted over the short term.

11. Glasgow City Centre's apex retail and leisure role means that it is continually investible and tends to benefit from increased market concentration, although corporate failures and store rationalisations apply here too. The loss of prominent department and variety stores from the City Centre is particularly noticeable. The prime Buchanan Street pitch is holding up well in this market. Vacancy rates are concentrically higher across the city core. Reinvestment in struggling or failed assets is planned and typically involves a reduction in retail space.

12. A 'squeezed middle' of regional towns has suffered most in the most recent market cycle, particularly those shopping malls which were reliant on branded multiple retailers. Many smaller towns adapted to show a broader mix of local commercial and service uses, typically on lower rents in real terms.

13. The winners in the current market cycle are the increasingly diversified warehouse parks which offer convenience, comparison, leisure, food & beverage and click-and-collect retailing. The City Region has a comparatively high proportion of retail warehouse space and the shift from bulky goods to other uses is creating 'High Street' type competition at these sites.

14. There is no obvious demand pressure from retailers when compared with the extensive regional supply of retail property types, sizes and locations. Local authority shares of retail stock, supply and take-up are balanced. Individual operators though, will continue to seek retail properties specific to their needs.

Quantitative assessment- baseline retail data 2024

15. The changes in comparison retail floorspace by local authority area from 2015 to 2024 have been identified. In 2015, the total for the City Region was just over 1,628,000 sq m gross. In 2024, it is estimated at nearly 1,408,000 sq m gross, which is a reduction of 14%.

16. On comparison goods shopping patterns, our findings estimate expenditure inflows to the City Region equivalent to 13% of the total residents' expenditure potential, with outflows equivalent to 3% of the residents' expenditure. The low outflows reflect the large

scale of the retail offer in the City Region. The estimated total comparison turnover is nearly £5,176 million in 2024.

17. The total floorspace of comparison retail planning consents is 59,686 sq m gross, compared to the existing total of 1,407,264 sq m gross comparison floorspace in the City Region (4%). Overall, there is little evidence of progress towards completing development of the consents, which suggests weak market demand for further comparison retail floorspace.

Comparison expenditure capacity forecasts to 2037- City Region overall

18. The study provides a range of forecast spare expenditure capacity for the City Region for 2024-37. The low end of the range assumes that internet based comparison expenditure will rise to 50% of all comparison spending by 2037 and the high end assumes 40% by that date. The forecast spare capacity at the low end of the range is nearly £283 million by 2037, which could indicatively support up to 34,000 sq m net. At the high end of the range the forecast capacity is nearly £1,244 million, with equivalent net retail floorspace of nearly 130,000 sq m net. The low forecast appears to more closely match market trends at present.

Recommendations

19. At present, there is no formal Guidance from the Scottish Government outlining the role, function and content of any future RSS. A new potential strategy on retailing for the Glasgow City Region could aim to fulfil the following functions to bring together the LDPs which will be advancing before the RSS:

- Provide a unifying framework for the next round of LDPs
- Update the network of centres
- Provide general policy support on retailing for LDPs
- Give support to development management on retail applications of regional significance

As the forthcoming RSS is yet to emerge, the recommendations below are essentially matters for discussion between the constituent local authorities in the GCR.

20. **Recommendation 1:** maintain up-to-date information on retail floorspace. A focus on comparison retail floorspace would be consistent with a regional strategic perspective on town centres.

21. **Recommendation 2:** review the existing network of strategic centres in Schedule 2 of the SDP 2017 to help inform the emerging RSS by reflecting current and forecast retail trends.

22. **Recommendation 3:** provide information and data to assist with consideration of where changes in the future proportion of retailing in some town centres would add most benefit in terms of their vitality and viability. This would apply to strategic town centres with masterplans and where major change is occurring.

23. **Recommendation 4:** maintain a cross boundary working group of planning officers for sharing retail information and experience. They would be regularly informed about retail activity and development in the other Council areas and instances where their area may be affected.

24. **Recommendation 5:** Development management- where planning applications with a major retail element could potentially threaten established centres in more than one local authority area, assessment of impact across adjoining local authority planning areas offers advantages. The local authority in which the application is situated is in the best position to take the lead on which other authorities are consulted. Cross boundaries consultation procedures should not become too rigid.

Recommendations for Local Development Plans (LDPs)

25. The following paragraphs outline a number of Recommendations for the eight GCR Authorities to consider as they develop their respective LDPs.

26. *Recommendation 1:* There is no strategic requirement for additional comparison floorspace within Glasgow City Region, beyond that already with consent. However, the additional comparison retail floorspace may form part of regeneration and restructuring strategies set out in LDPs for specific centres. There is also no strategic requirement for additional convenience floorspace. However, opportunities for additional convenience floorspace may be identified in LDPs to address local shortfalls and to support local living.

27. *Recommendation 2:* This report has exposed the importance of having up to date information on retail floorspace collected by each of the eight local authorities. Acknowledging that resources are limited to undertake retail surveys, priority could be given to the largest town centres, and principal shopping streets in the City Centre. The frequency of surveys could be once every three years for monitoring purposes for example.

28. *Recommendation 3:* Many town centre boundaries are wider than their retail function. A review of the extent of the currently defined town centre boundaries is recommended, with a view to defining smaller 'town centre retail' areas to reflect the primary retail pitches for the purposes of development management. Secondary town centre retail areas could also be defined.

29. *Recommendation 4:* Sub sections 8.2 and 8.3 outline the changes and trends that have occurred in the GCR since 2015. Currently, these elements are either being actively managed by the constituent Authorities and other interested parties, or they are issues that are currently being considered by the Authorities and the relevant parties involved. Any future LDP will have to reflect the agreed spatial response to these changes, trends and any other related matters, where applicable.

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Appendix 1 Convenience expenditure per capita in the Council areas 2024-37 (Experian)

Appendix 2 Comparison expenditure per capita in the Council areas 2024-37 (Experian)

Appendix 3 Estimated comparison turnover in each Council area 2024- method

Appendix 4 Hamilton Town Centre Comparison Retail Floorspace 2024

Appendix 5 East Kilbride Town Centre Comparison Retail Floorspace 2024

Appendix 6 Glossary of terms

1 Introduction

1.1 Study brief

1.1.1 The purpose of the research within this topic is to assess the supply and demand for retail land and property in the Glasgow City Region (GCR) over the next ten years. It aims to present an evidence-based strategic overview on retailing linking all eight of the constituent local authorities. Evidence in the study will assist the updating and production of local development plans in the Council areas.

1.2 Scope

1.2.1 The level of detail is broad and appropriate for a strategic report. The focus is on the **comparison** retail sector because the convenience retail sector is not strategic. However the combined impact of new convenience retail development on locations is of strategic interest. Analysis of the convenience sector is limited to convenience expenditure forecasts by local authority area and national convenience retail market trends. Both these usefully contribute to any retail impact assessments for localised catchment areas.

1.2.2 The report structure is set out under the following sections:

- 2 Population and retail expenditure projections
- 3 Retail policy framework
- 4 National trends in retailing
- 5 Glasgow City Region retail market
- 6 Quantitative assessment- baseline data for 2024
- 7 Comparison expenditure capacity forecasts to 2037- City Region overall
- 8 Recommendations

2 Population and retail expenditure projections

2.1 Introduction

2.1.1 This section shows the extent of the Glasgow City Region, together with the current and projected populations and associated retail expenditure for each of the eight Council areas to 2037. Map 2.1 illustrates the Glasgow City Region.

2.2 Population

2.2.1 Table 2.1 shows the current and projected population of the City Region up to 2037. The projections are based on the National Records Scotland (NRS) 2018 based population projections (still the latest available at sub national level).

Table 2.1 Glasgow City Region: population projections 2024, 2029 and 2037					
	2011 Census	2018	2024	2029	2037
East Dunbartonshire	105,026	108,330	110,794	112,763	115,171
East Renfrewshire	90,574	95,170	98,849	101,789	105,654
Glasgow	593,245	626,410	638,319	645,750	657,060
Inverclyde	81,485	78,150	75,367	72,916	68,797
North Lanarkshire	337,727	340,180	341,134	341,101	339,474
Renfrewshire	174,908	177,790	180,689	182,597	184,472
South Lanarkshire	313,830	319,020	323,092	325,710	327,778
West Dunbartonshire	90,720	89,130	87,998	86,881	84,574
City Region Total	1,787,515	1,834,180	1,856,242	1,869,507	1,882,980
Sources 2011 Census and the NRS 2018 based population projections by Council area					

2.2.2 Projected population growth for the City Region overall is minimal at 0.7% for the five- year period 2024-29 and also 0.7% for the eight-year period 2029-37. Some of the Council areas are projected to experience a small decline in population from 2024-37. These include Inverclyde, North Lanarkshire, and West Dunbartonshire. Among the others, Glasow's population is forecast to increase by 3% over the period.

2.3 Convenience retail expenditure potential

2.3.1 The Experian convenience expenditure per capita data for each Council area and the City Region is contained in Appendix 1 and applied to the projected populations. The convenience retail expenditure potential of the residents of the City Region is projected to fall by 1% to 2029 with negligible change from 2029-37 as shown in Table 2.2. The figures exclude special forms of trading (SFT) as detailed in the appendix.

2.4 Comparison retail expenditure potential

2.4.1 Similarly, the Experian comparison expenditure per capita data for each Council area and the City Region is contained in Appendix 2 and applied to the projected populations. The projected comparison retail expenditure potential of the residents of the City Region is predicted to grow by 3% to 2024 and by 2% from 2029-37 as shown in Table 2.3. The figures exclude special forms of trading (SFT) as detailed in the appendix. Most of the SFT comprises internet expenditure and the proportions are high, as shown in detail in

Appendix 2 and repeated in the footnote to Table 2.3. Note that our study assumes much higher proportions of internet spending on comparison goods compared to the forecasts by Experian, with up to 50% of comparison retail expenditure undertaken online by 2037. The effect is to reduce the forecast level of comparison expenditure that will be available to service new shop floorspace. In our opinion, the reduced forecasts better match retail market conditions.

Table 2.2			
Glasgow City Region residents' convenience retail expenditure potential (in 2022 prices)			
Excluding special forms of trading (mainly internet)			
	2024	2029	2037
	£ million	£ million	£ million
East Dunbartonshire	300.5	301.8	307.3
East Renfrewshire	263.5	267.7	277.0
Glasgow	1,542.1	1,539.3	1,561.6
Inverclyde	194.6	185.8	174.8
North Lanarkshire	826.9	815.9	809.6
Renfrewshire	471.4	470.0	473.4
South Lanarkshire	845.3	840.8	843.6
West Dunbartonshire	226.7	220.8	214.3
Glasgow City Region	4,670.9	4,642.0	4,661.6
		2024-29	2029-37
		£ million	£ million
City Region forecast convenience retail expenditure growth		-29.0	19.6
		-1%	0%

Sources
 NRS 2018 based population projections by Council area and Experian convenience expenditure per capita by LA in 2022 prices commissioned for this study.
 Figures for 2024, 2029 and 2037 derive from the UK growth rate in convenience expenditure per capita from Experian Retail Planner Briefing Note 21 (Appendix 4a), February 2024

Table 2.3			
Glasgow City Region residents' comparison retail expenditure potential (in 2022 prices)			
Excluding special forms of trading (mainly internet)			
	2024	2029	2037
	£ million	£ million	£ million
East Dunbartonshire	320.6	335.5	346.2
East Renfrewshire	283.5	300.2	314.7
Glasgow	1,579.1	1,642.6	1,688.5
Inverclyde	189.0	188.0	179.2
North Lanarkshire	805.1	827.8	832.3
Renfrewshire	467.3	485.6	495.6
South Lanarkshire	842.9	873.8	888.3
West Dunbartonshire	215.0	218.3	214.7
Glasgow City Region	4,702.7	4,871.9	4,959.7
		2024-29	2029-37
		£ million	£ million
City Region forecast comparison retail expenditure growth		169.2	87.8
		3%	2%

Sources:
 The figures for 2022 are from the Experian *Area Comparison Reports* for each Council area, commissioned for this study.
 Figures for 2024, 2029 and 2037 derive from the UK growth rate in comparison expenditure per capita applied to the 2022 figures for each Council area
 UK expenditure per capita figures are shown in *Experian Retail Planner Briefing Note 21* (Appendix 4a), February 2024

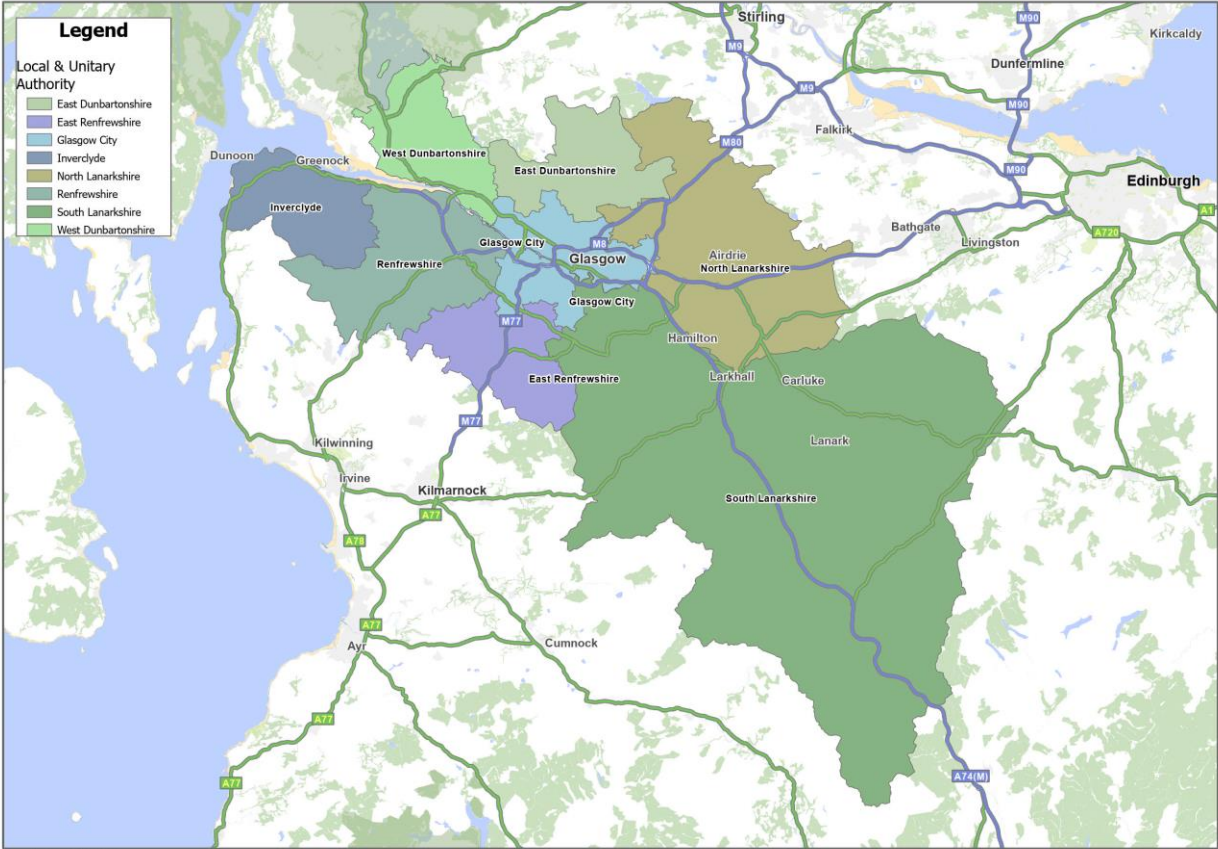
*Deductions require to be made to allow for special forms of trading (SFT- internet expenditure, mail order etc), which do not relate to in-store retail floorspace.
 The proportions deducted derive from *Experian Retail Planner Briefing Note 21* - Appendix 3-(adjusted SFT)

	2024	2029	2037
	-24.3%	-27.4%	-29.4%

Market demand for comparison retail floorspace indicates that the proportion of internet expenditure in the GCR is higher than the Experian proportions.
 Therefore the following proportions are applied:

	2024	2029	2037
	-30%	-38%	-50%

Map 2.1 Glasgow City Region



Experian Copyright 2023

3 Retail policy framework

3.1 Introduction

3.1.1 This section summarises the latest Scottish national planning policies on retailing and town centres, including national strategy documents. It also identifies the retail policies in the local development plans for each of the eight Councils in the City Region.

3.2 At the Heart of Economic Transformation

3.2.1 The above document is the Report of the City Centre Recovery Task Force 2021-22, published in March 2022. The Task Force is an alliance between the Scottish Government and Scotland's seven cities. The cities are identified as fundamental to the vision of achieving a wellbeing economy under the Scottish Government's 10-year National Strategy for Transformation.

3.2.2 The impetus was to achieve post Covid recovery. The document adopts a structure for analysis of cities in the form of 'hubs'. These include Human Capital Hubs (skills and knowledge-based activities), International Hubs (cities as a point of entrance for international investment and tourism) Consumption Hubs (city centre high streets), and Cultural Hubs (cultural institutions).

3.2.3 There is a wider reference on measures to improve city centres generally, compared to the focus on retail in the other strategy documents in our review. However, importantly in terms of direction, it states there is a need to reduce the 'over-supply of retail' and the need to increase the cultural offer in city centres.

3.3 Getting the Right Change- A Retail Strategy for Scotland

3.3.1 Published in March 2022, the above document sets out the Scottish Government's vision and strategy for retailing in Scotland. The document is grouped around themes of *Sector, People and Place*, with *Just Transition* focussing on action to achieve the climate target of net zero by 2045.

3.3.2 The document reinforces the continued importance of retailing in town centres. The vision for retailing was agreed between industry, trade unions and the Scottish Government in developing the strategy with a view to working in partnership.

3.3.3 It refers to the rapid changes in digital related technology, which is altering the retail sector, including supply chains and deliver to customers in a world of evolving markets against the background of advancing internet-based retailing. The document sets out broadly how the Scottish Government intend to lend support to the retail industry in terms of training and promoting wellbeing.

3.3.4 Importantly, the document states the principle of the **20-minute neighbourhoods**, *where people live within 20 minutes of walking, wheeling, cycling, or using public transport to reach key amenities like shops, services and green spaces*. Strong support is given to promote 'living locally', which for retailing means, local shopping opportunities, local suppliers and promotion of town centres as retail and cultural destinations, including repurposing vacant units. We comment that the concept has little precision as guidance, because the travel times under the stated modes will be very different generally.

3.4 Town Centre Action Plan Review

3.4.1 Published in April 2022, this document is the Joint response from the Scottish Government and COSLA to the Town Centre Action Plan Review by the Town Centre Action Plan Review Group. The joint response adopts the vision developed by the Review Group that *towns and town centres are for the wellbeing of people, the planet and the economy and that towns are for everyone, and everyone has a role to play in making their own town and town centres successful.*

3.4.2 On retailing, the document reinforces support for the ‘town centre first principle’ by sharing and promoting best practice and by strengthening guidance in the Scottish Public Finance Manual to better reflect the importance of local needs and opportunities.

3.4.3 Support is given to placing town centres at the core of NPF4 and limiting new out of town development. The document gives support for local living and the 20-minute neighbourhood concept.

3.4.4 The document includes responses to other town centre related issues, which are: taxation, digital towns, creating enterprising communities and vibrant local economies, and climate action.

3.5 Inquiry into Retail and Town Centres in Scotland

3.5.1 Published in November 2022, the document sets out the views of the cross- party Economy and Fair Work Committee on the Inquiry findings.

3.5.2 The Committee welcomed the Scottish Government’s retail strategy and confirmed the importance of the sector to the national economy. Recognition was given to the growing role of multi-channel retailing among operators, including independents. They also recognised the increased demand for online retail activities.

3.5.3 The Scottish Government was asked what equalities expertise the Retail Industry Leadership Group possess and seek assurance that gender-related barriers will be diminished in the sector. They welcomed the Fair Work agreement.

3.5.4 Recognition was given to the individuality of towns and support should be tailored on that basis, led by community groups.

3.5.5 The Committee agreed that the overarching principle should be to rebalance the cost of doing (retail) business in town centres versus out of centre locations. The Committee supported the creation of a new general town centre use class.

3.5.6 Attention was drawn to the difficulties of establishing ownership of properties and sites in town centres as an obstacle to redevelopment and bringing properties back to productive use to benefit the community. Support was given to every town having its own development plan.

3.5.7 The Committee recognised that creation of vibrancy around ‘place’ for every town requires involvement with cultural bodies and organisations.

3.6 National Planning Framework 4

3.6.1 NPF4 is the national spatial strategy for Scotland, which was approved and finally adopted by the Scottish Government in February 2023. On town centres and retailing, it continues the ‘town centre first’ principle from the now superseded SPP (Scottish Planning

Policy), but with important changes including new, updated requirements for inclusion in Local Development Plans (LDPs). Pages 81-85 of NPF4 are most relevant to this review.

3.6.2 LDPs should support sustainable futures for the network of centres, including city centres, town centres, local centres, and existing commercial centres where appropriate. A new requirement is to include the principle of 20-minute neighbourhoods, as defined in Appendix F to NPF4. A town centre vision must also be incorporated in the network.

3.6.3 There is a new requirement for LDPs to assess and identify where clusters of non-retail uses are adversely impacting on the community. LDPs should also identify any areas appropriate for additional drive-thru facilities which would not adversely impact on the principles of local living and sustainable travel. Note that proposed drive-thru facilities will only be supported if the location is identified in the LDP.

3.6.4 **NPF4 Policy 27** gives support for development proposals that improve the vitality and viability of city, town, and local centres. Development proposals will be consistent with the 'town centre first' approach. These include uses that generate significant footfall, which are: commercial, leisure, offices, community, sport and cultural facilities, public buildings such as libraries, education and healthcare facilities, and public spaces.

3.6.5 Policy 27 does not support development proposals outside city, town, and local centres unless a *town centre first assessment* (page 82 of NPF4) demonstrates that all centre/ edge of centre options have been discounted, the scale of the proposal cannot be reasonably altered to be accommodated in a centre, and the impacts on existing centres have been thoroughly assessed to demonstrate no significant adverse effects on their vitality and viability.

3.6.6 **NPF4 Policy 28** is specific to retailing. LDPs should consider where there may be a need for further retail provision. This may be where a retail study identifies deficiencies in retail provision in terms of quality and quantity in an area; or when allocating sites for housing or the creation of new communities, in terms of the need for neighbourhood shopping, and supporting local living. Also, LDPs should identify areas where proposals for healthy food and drink outlets can be supported.

3.6.7 Under Policy 28 :

a) Development proposals for retail (including expansions and changes of use) will be consistent with the town centre first principle. This means that new retail proposals:

- i. will be supported in existing city, town and local centres, and
- ii. will be supported in edge-of-centre areas or in commercial centres if they are allocated as sites suitable for new retail development in the LDP.
- iii. will not be supported in out of centre locations (other than those meeting policy 28(c) or 28(d)).

b) Development proposals for retail that are consistent with the sequential approach (set out in a) and click-and-collect locker pick up points, will be supported where the proposed development:

- i. is of an appropriate scale for the location;
- ii. will have an acceptable impact on the character and amenity of the area; and
- iii. is located to best channel footfall and activity, to benefit the place as a whole.

c) Proposals for small new scale neighbourhood retail development will be supported where the proposed development:

- i. contributes to local living, including where relevant 20-minute neighbourhoods and/or
- ii. can be demonstrated to contribute to the health and wellbeing of the local community.

3.6.8 The main change from the SPP is that the provisions of the sequential test for retail development outside town centres are much more stringent. Retail proposals are only consistent with national policy if they are on edge of centre sites and in commercial centres identified to include retailing. Out of centre locations are now contrary to national policy, except for minor neighbourhood retail proposals.

3.6.9 Now there is no specified requirement for traditional supporting retail impact assessments, nor threshold sizes of proposed new floorspace above which an impact assessment is required. We interpret the need for a retail impact assessment would remain part of the discussion with applicants at the pre-application stage. For example, the circumstances might include ensuring that a proposed development is of an appropriate scale for the location, or where an application in a commercial centre would divert trade from town centres.

3.6.10 The implications of NPF4 are that it is essential that sites for future retail development are identified in LDPs during the preparation consultation process. Once an LDP is adopted, retail site development opportunities will be plan-led, with minimal opportunities to accommodate emerging new, market-led demand retail sites during the LDP lifespan.

3.7 Regional Spatial Strategy- network of centres

3.7.1 Due to changes in the planning system, the 2017 Clydeplan Strategic Development Plan (SDP) is no longer a statutory planning policy document. The new system requires authorities to produce a Regional Spatial Strategy (RSS). An RSS will not be part of the statutory development plan, but Local Development Plans and the National Planning Framework must have regard to the RSS.

3.7.2 Of continuing relevance to retailing is the network of centres set out under Policy 4 of the SDP. There are 23 strategic centres, and their locations are illustrated in Diagram 3 in the Plan, reproduced in Map 3.1 of this report. The network of strategic centres includes the City Centre, 20 town centres, one town centre to be created (Ravenscraig) and a commercial centre (Braehead). A summary of the role of each centre and the challenges facing it appear Schedule 2 of the SDP, together with the actions to be taken. Under Policy 4, the network of strategic centres are the preferred locations for strategic scale development, with the City Centre as the apex of the network because of its scale and diversity of functions. Retailing is identified as among the role and functions of most of the strategic centres, with some centres having a much greater retail function than others. Contraction of the retail offer in most of the centres is one of the most frequently identified issues in Schedule 2. Measures to regenerate the centres, including reconfiguration of existing retail floorspace, feature highly in the recommended actions to be taken. We believe this remains true today when considering a new regional special strategy for the future.

3.8 Local Development Plan policies on retailing in the eight Council areas of the Glasgow City Region

3.8.1 A summary of the retail policies in the currently adopted Local Development Plans in the City Region area is provided in Table 3.1. It should be noted that masterplans are being advanced in various town centres in that table via the LDPs and existing retail consents. Although some of the plans are relatively recent, they will all require to be updated to accommodate the requirements of NPF4. The West Dunbartonshire LDP (2010) is notably historic, but preparation of a new Local Development Plan (LDP 3) has commenced.

3.9 Town and Country Planning (General Permitted Development and Use Classes) (Scotland) Miscellaneous Amendment Order 2023

3.9.1 The Town Centre Review Group set up by the Scottish Government in July 2022, suggested that the Government should consider the desirability of revisions to the Use Classes Order including merged 'town centre' use classes. As of 1st April 2023, there is a Use Class 1A, which combines former Use Classes 1 and 2. There are new permitted development rights for change of use from Class 1A to Classes 3 and 4.

Map 3.1 Strategic Centres

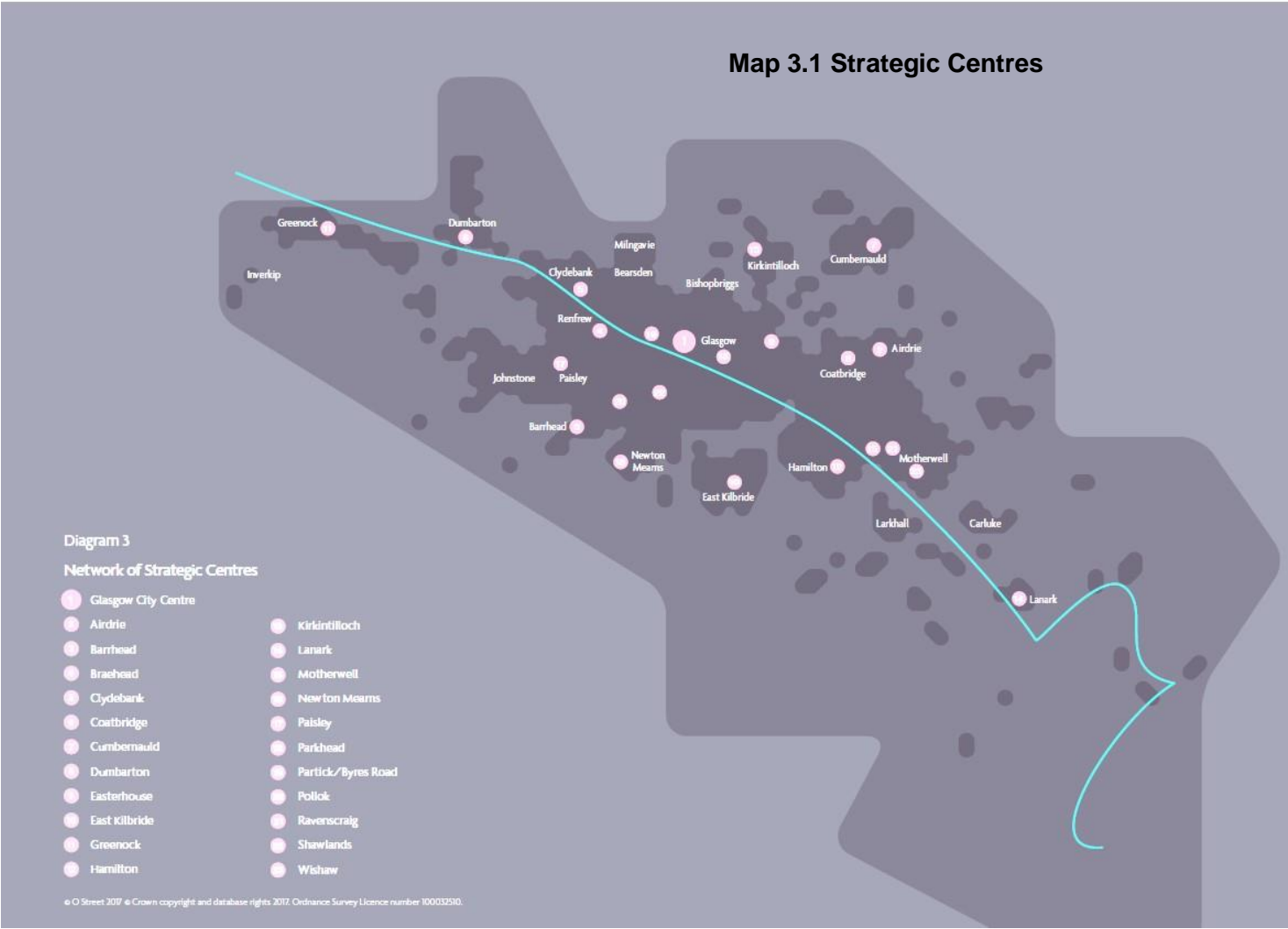


Table 3.1 Local Development Plan Policies on Retailing in the eight Council areas within the Glasgow City Region- 2024						
Local Development Plans (Adopted)	Town centres first principle- statement incl. sequential test	Identification of network of centres	Town centre strategies in LDP mentioning retailing	Commercial centres identified	Retail capacity statements made in LDP	Retail impact assessments (when needed)
East Dunbartonshire LDP2- 2022 Policy 14: Network of Centres and Retail Policy 1: Development Strategy (U)	page 172	page 172 page 8 - list of town/ village centres	yes- Policies 2-4 & 6	page 172 Strathkelvin Retail Park	yes-page 173	page 173
East Renfrewshire LDP2- March 2022 Strategic Policy 1: Development Strategy Policy SG10: Town & Neighbourhood Centre Uses Policy SG11: Town & Neighbourhood Centre Proposals	page 28 page 115	page 116- list	page 117- list Limited mention of 'retail'	none	no	page 115
Glasgow City Development Plan- March 2017 Policy CDP 4: Network of Centres CDP4: Supplementary Guidance CDP 2: Sustainable Spacial Strategy (incl. SG 2)	pages 53/54 pages 56/57 As part of overall assessment of proposals	pages 55/56 City Centre, Major Town Centres, Local Town Centres (total 40) & Local shops pages 56/57 As part of overall assessment of proposals	yes- pages 37-43	page 55 Other Retail and Commercial Leisure Centres pages 56/57 As part of overall assessment of proposals	no	pages 56/57 As part of overall assessment of proposals
Inverclyde Local Development Plan- August 2019 Policy 22: Network of Centres Strategy Policy 23: Greenock Town Centre Retail Core <i>(There is also a Proposed LDP- May 2021. It will not continue to adoption. Work on new LDP started 2024)</i>	page 28	page 29- list	page 30 page 30	none	no	page 28

Continued overleaf

Table 3.1- continued						
Local Development Plan Policies on Retailing in the eight Council areas within the Glasgow City Region- 2024						
Local Development Plans (Adopted)	Town centres first principle- statement incl. sequential test	Identification of network of centres	Town centre strategies in LDP mentioning retailing	Commercial centres identified	Retail capacity statements made in LDP	Retail impact assessments (when needed)
North Lanarkshire Local Development Plan- July 2022 Placemaking Policies- 1: Mixed Use Centres (overall) 1A Strategic Town Centres (6): Policies PP1A and AD1A 1B Other Town Centres (3): Policies PP1B and AD1B 1C Local Centres (6): Policies PP1c and AD1C Ravenscraig Masterplan- Town Centre/ Mixed Use incl. retail supported by outline planning consent. Also 3 neighbourhood centres	page 44 page 46/47 page 48/49	page 43 page 44 Strategic Centres: Airdrie, Cumbernauld, Coatbridge, Motherwell, Ravenscraig Wishaw page 46 page 48	page 44 page 85- components map	page 43 Under mixed use: Caledonian Centre, Wishaw, Birkenshaw, Westway RP, Cumbernauld, B&Q and Mackinnon Mills, Coatbridge	no	page 45 page 47 page 49
Renfrewshire Local Development Plan- December 2021 Spacial Strategy- Centres Policy C1: Network of Centres Policy C2: Development outside Network of Centres	page 21	pages 21-23 Strategic Centres- Paisley & Braehead, Core Town Centres, Local Centres, Village Centres, Local Commercial Centres	pages 24/25 Paisley and Braehead Development Frameworks	pages 22/23	no	
South Lanarkshire LDP 2 -January 2021 (Volume 1) Policy 9: Network of Centres and Retailing Strategic and Town Centres, Local Centres, Out of centre/ Commercial Centres Network of Centres- Strategic Centres (E Kilbride/ Hamilton/Lanark) Network of Centres- Town Centres (7) & Local Centres Out of Centre and Commercial locations Policy 10: New Retail/ Commercial Proposals	page 26 page 26	page 25 pages 22/23 pages 22 & 24 pages 24/25 page 26	page 23 page 24 page 25	page 25	no	page 26
West Dunbartonshire Local Development Plan - March 2010 see section 7 Town Centres and Retailing - pages 83-103 Policy RET 1: Retail and Town Centre Strategy Policy RET 2, RET 2A, RET3, RET 4, RET 5, RET 6, RET 7 (Work started on a new Local Development Plan (LDP 3) December 2023. Proposed LDP 2 was abandoned.)	page 92	pages 87-91	pages 87-91	page 91	no	page 93

4 National trends in retailing

4.1 The economy

4.1.1 Scotland’s economy grew by 0.7% in real terms during the first quarter of 2024. However, GDP was only 0.2% higher than during the same quarter last year. The country appears to have avoided a formal economic recession despite high price inflation affecting consumption and growth (Scottish Government). Forecasts anticipate a modest recovery to 0.8% economic growth in 2024/25 followed by three years of stable GDP growth of 1.3% per annum then a further marginal improvement to 1.4% (Scottish Fiscal Commission; it is worth noting that price inflation is falling faster than was anticipated at their forecast date).

4.2 Retail performance

4.2.1 During the inflation and interest rate cycle of 2022-24 to date, Scotland recorded its largest drop in living standards since records began in 1988 (Scottish Fiscal Commission, Table 4.2). As these conditions begin to ease during the second half of 2024, real disposable income driven by earnings growth is now expected to recover to 2021/22 levels by 2026/27.

4.2.2 In May 2024 the Scottish Retail Consortium (SRC) recorded a 0.5% decline in retail sales compared to the previous year. This reduction in sales was potentially attributable to the boost in sales during the same period of 2023 during the King’s Coronation and bank holidays. The strongest performing sectors were food and drink, technology, beauty, some household goods and casual clothing.

4.2.3 While not yet showing positive readings, consumer confidence surveys have improved substantially, with GFK UK survey improving by 15 percentage points and the most recent (Q4 2023) Scottish Consumer Sentiment survey (household spending) rising to show a net balance of -11.8% having improved steadily from a low point of -40.3% in Q1 2023. Short term, retailers are now hoping for sales boosts from major sports and entertainment events during 2024 and a period of political stability following the General Election. Looking further forwards, falling price inflation, anticipated falls in interest rates and forecast growth in real disposable income noted above are positive medium- term signals supporting future growth prospects for retail sales.

Table 4.1

Retail Economy Indicators				
2020	2021	2022	2023	2024
Real consumer disposable income (Scotland) (2021/22 = 100)				
99.5	100.2	100	97.5	97.6 <i>(forecast)</i>
Scottish Consumer Confidence (Household Spending) (0 = neutral)				
-22.8	-12.2	-27.4	-31.8	-11.8

Sources: Scottish Fiscal Commission (income), Scottish Government (confidence)

Scottish Consumer Confidence index is Q2 each year except for 2020 which is Q3

4.2.4 Shopper footfall has not fully recovered to pre-pandemic levels in all locations. As with the retail sales data above, comparing May 2024 with May 2023 is unflattering and shows a 5.4% decline in footfall. On this basis SRC / Sensormatic cites eight consecutive months of “sub-par foot-traffic”. Scotland’s Towns Partnerships / MRI Software take a more positive stance, noting some short-term footfall growth on the country’s high streets during the month of May.

4.2.5 The same SRC survey reports a 4.8% reduction in footfall in Glasgow city centre. Longer term, Glasgow City Council’s city centre dashboard records footfall in July 2024 as 89% of footfall at the survey start date in January 2018. This ranges from 80% on Sauchiehall Street near Wellington Street to 104% on Bath Street. Footfall counter or survey data for other larger centres outside of Glasgow may be useful if this can be sourced.

4.2.6 Store closures continue to exceed store openings. Across the UK there were 14,018 closures in 2023 and 9,138 openings, leading to a net loss of 4,880 stores (LDC). The principal reasons for this are disputed, with some sources citing the growth on online competition and others the cost of living affecting consumer spending along with higher costs of business for retailers. Growing sectors were mainly food & beverage and supermarkets / discounters, while notable stores closures included fashion and gift chains. The majority of openings were in shopping parks and other out-of-town or edge-of-town locations, rather than on high streets.

4.3 Comparison retail

4.3.1 Retail performance varies greatly by location and types of shop. This section considers the long run changes which affect the physical retail market, including in Glasgow City Region.

4.3.2 The principal drivers of comparison shopping are **market concentration** into larger centres, and the relentless shift to **online shopping**. Summaries of these trends are provided below, and regional market evidence is contained in Section 5.

4.3.3 **Market concentration** has occurred over a number of decades as the UK’s multiple retailers have focused on the largest centres. Increasingly affluent and mobile consumers sought a wider choice of goods and services, which could only be provided at dominant regional centres such as Glasgow city centre and in destination malls (such as Braehead and Silverburn) and destination shopping parks (e.g. Glasgow Fort). For some retailers the formats are changing too, towards more experiential formats (Apple and Lego stores for example). As this market concentration has progressed, strategically important regional town centres have seen a long-term decline in their portfolio of multiples retailers and market performance, for example East Kilbride, Greenock, Airdrie, Hamilton, Cumbernauld and others.

4.3.4 Consumer behaviour has changed emphatically changed towards a higher proportion of shopping transactions being made **online**. According to the ONS, the online share of all retail sales increased from 5% in 2006 to 27% in 2022¹. The direct impact is that less comparison goods sales floorspace is required by retailers, as that comparative exercise

¹ The online share of all retail sales spiked in 2021 at 31% due to the pandemic restrictions placed on shops.

is made by consumers online and mobile as well as in-person. Leading retail brands such as Next and John Lewis are now omni-channel. Next is a particularly interesting example which recently reported 3.3% year-on-year sales growth, however this comprised 5% growth in online sales and no growth in in-store sales. Many multiple retailers are now much more focused on right-sizing their portfolios into the optimum locations and units than on net expansion into new locations (current retailer requirements are also reported in Section 5).

4.3.5 The online shopping trajectory trend is modelled for the Glasgow City Region in Sections 6 and 7. Continued growth in online shopping is anticipated and this is currently reflected in comparison goods floorspace contraction and a lack of significant new development. Indeed, some leading and growing comparison retailers such as Shein, ASOS, Boohoo and TEMU are online-only. These retailing models are generating debates about tax competition.

4.3.6 Meanwhile, social shopping on platforms including TikTok, Facebook Marketplace, Amazon Consult-a-Friend and Instagram Reels is forecast to double between 2023 and 2028² and live commerce on these platforms could account for 10-20% of all online shopping by 2026³. Shifts from the online to the physical world by operators such as Gymshark which began online and is now opening stores are by comparison still uncommon.

4.3.7 The early signal for the shift to online was, with hindsight, the migration of services such as travel, banks, insurance and estate agencies and steady closure of their branches. Which?⁴ reports that 6,000 (60%) UK bank branches have closed since 2015. Thirty bank branches in the Glasgow City Region are due to close in 2024. This particularly affects some of the traditional town centres around the region which were never major shopping destinations but did have a wide range of such local services. Where closures leave a community with no bank, the Link initiative launched in 2022 by a group of major banks seeks to re-provide services in the form of banking hubs or ATMs. The trend is not all one-way and some travel agencies for example have opened new outlets in the Region.

4.3.8 On-line shopping has fuelled a compensatory increase in floorspace to service delivery and click-and-collect demand. This retail logistics activity happens in industrial buildings on arterial transport routes and to some extent in the non-sales floorspace within shops. Existing large distribution units for convenience operators such as Lidl's and Co-ops' at Newhouse are now joined by online-only logistics units such as the new Amazon's new 150,000 sq.ft. concept distribution hub at Glasgow Business Park.

4.3.9 The most obvious current casualties of both online shopping and market concentration are shopping malls built in the 1970s to 1990s. These initially offered a broad range of department, variety and comparison shops all undercover on multiple levels alongside a food court and perhaps leisure uses such as cinemas, but many now have permanent vacancies and require remodelling (see Section 5 and 6).

² <https://www.statista.com/topics/8757/social-commerce/>

³ McKinsey & Company on Facebook and X (formerly Twitter)

⁴ <https://www.which.co.uk/money/banking/switching-your-bank/bank-branch-closures-is-your-local-bank-closing-ayYyu4i9RdHy>

4.3.10 This stress among shopping malls is structural rather than cyclical. The Investment Property Forum's current 5-year forecasts⁵ predicting shopping centres to be the worst-performing asset class despite an improving consumer economy, particularly those dated centres with high vacancies which lack the development viability to attract capital expenditure.

4.3.11 The winners in the current market cycle are retail warehouse shopping parks. British Land, a major owner, cites their attractions as "*affordability, adaptability and accessibility*". While retail warehousing began with bulky household goods in the 1970s, an increasing range of occupiers including supermarkets and discounters, fashion, leisure, food & beverage and other formats is now being attracted. Shopping brands moving onto retail parks include Next and Superdrug. Where planning consents can be secured, these comparison, convenience and leisure formats are gradually replacing some of the bulky goods retailers which initially occupied these locations. Further diversification of retail parks for example into healthcare is underway. Parks with foodstore anchors trade particularly well.

4.3.12 Glasgow City Region's retail warehousing floorspace is the largest of any UK regional city, according to analysts PMA who identify 20 formal retail parks across the region. The Region also has an over-representation of high street and fashion retailers on these retail parks and correspondingly less bulky goods floorspace, further increasing competition with town centres. Glasgow Fort in particular is anchored by a full range Marks & Spencer and a Morrisons superstore plus a strong representation of high street, fashion and food & beverage chains.

4.3.13 At a regional level therefore, the reduction in bulky goods floorspace anticipated by former Clydeplan 2017⁶ is underway. However, rather than reduced demand for retail parks, a much wider range of operators is moving in. In part these are becoming the "*strategic centres which have good transport hubs*" for click-and-collect shopping envisaged by Clydeplan, although in some cases that transport access is predominantly car-based. Although some retail parks adjoin town centres, others present a challenge to town-centre-first planning policies. Given the costs and planning barriers to creating new locations, it is likely that the reconfiguration and expansion/densification of existing retail parks will continue, driving up their value.

4.3.14 By store type, department and variety stores have been worst affected by market concentration and online trading. Lichfields estimates that 85% of UK stores operated by the likes of Debenhams, House of Fraser and Lewis have closed over the past decade. Most sub-regional centres as well as Glasgow city centre have been affected by the loss of individual department stores and branded chains over time. Variety stores such as BHS have also been lost while M&S has consolidated its portfolio, again leading to regional closures. In a recent glimmer of hope for department and variety stores however, M&S has taken 20,000 sq.m. across two former buildings in Bath and Bristol for flagship stores.

4.3.15 As a consequence of these market trends, new retail development is at a very low ebb. The only recent, major new development in Scotland is Edinburgh's 1.7 million sq.ft. St James Quarter which has attracted a leading range of brands and, notably, is 50% leisure

⁵ IPF members only

⁶ Strategic Development Plan Proposed Plan - Background Report January 2016 Network of Strategic Centres.

(cinema, food & beverage, event space, bowling, darts) and residential on the upper floors. In other locations, the recent retail development cycle has targeted neighbourhood parades with a standard line-up of food, discount retailers and coffee (e.g. Costa) / hot food (e.g. Greggs).

4.3.16 At the current point the market cycle in mid-2024, while a number of retail chains such as Body Shop, Ted Baker and Superdry continue to struggle, occupier markets are generally more stable than they were immediately post-pandemic. Acquisitive brands include Hugo Boss, Shoe Zone, Trespass and M&S (despite some closures). Major investors now see prime retail as recovering and investible, however that stance applies to only a small number of dominant locations and assets.

4.3.17 For the majority of traditional town centres, diversification to backfill surplus shops has been underway for a number of years – in fact since the aftermath of the 2008 Global Financial Crisis. This initially focused on leisure uses such as cafes and bars/restaurants to sustain revenue and footfall, but as that market cycle has eased and multiple retailers did not reappear then other uses including hotels, offices, recreation, community and residential considered, particularly for problem buildings and tertiary areas on the edges of town centres. The public sector has a role in this process of change and a number of town centre strategies including interventions are currently underway across the region. At the micro-level there can be some diversification within stores, for example to add café, galleries and franchises. Services which cannot be bought online such as health & beauty, repairs and servicing, pharmacy and fresh hot food and drink remain active in town centres. What is not yet fully clear is whether some repatriation of spend to local outlets through home and hybrid working is also benefiting some of the Region's commuter towns.

4.4 Convenience retail

4.4.1 As noted in the introduction, convenience retailing is local rather than strategic for the City Region, although the combined impact upon locations is of strategic interest. Changes tend to be incremental driven by brand competition rather than growth:

- Until the mid-2010s that brand-led growth was driven by the largest superstore operators – Tesco, ASDA, Sainsbury and Morrisons – opening new stores around the country and region. Some of that growth was not grocery-led but was due to expansion into comparison goods. The development wave halted a number of years ago although Sainsbury did diversify its basket of goods by buying Argos and integrating it into stores.
- A subsequent phase of urban 'metro' convenience stores was launched but is now less active (other than in new locations such as regeneration areas and urban expansions). Indeed, some city centre convenience stores reliant on office workers have struggled to recover from the shift to hybrid working brought on by the pandemic.
- The current convenience retail phase, supported by price inflation and cost-of-living pressures, is delivering new discount Aldi and Lidl stores either stand-alone or as part of new-build neighbourhood centres with variety discounters and food & beverage operators. Aldi and Lidl were each aiming for 1,000 UK stores by this year. Aldi's share of the grocery market has now overtaken Morrison's. More

affluent areas are being targeted by M&S Food. While these new developments are in urban areas, those with a mixed tenant line-up tend to prioritise visibility and accessibility at sites with both walk-in and car-borne catchments, rather than town or city centres.

4.5 Leisure

4.5.1 For the purposes of this report, leisure expenditure falls outwith the retail market capacity modelling. As noted above however, it is a major part of retail locations and linked spending, whether casually in the form of a coffee while shopping, or formally via a visit to the gym or dinner and a movie. Leisure uses bring additional expenditure and extend customer dwell-time:

- Restaurants, bars and cafes often fit well within shop units, and are interchangeable with shops for many locations. The casual dining market has retrenched following over-expansion, the pandemic restrictions and costs-of-living and cost-of-business inflation. Coffee chains have continued to expand, often in drive-thru formats for which NPF4 now requires LDP to identify locations.
- Larger uses that do not fit into standard shops units such as hotels, cinemas and health clubs may be purpose-built or adaptations of existing buildings. Glasgow city centre's hotel boom has eased recently, and cinemas appear fully committed (Cineworld which has 3 multiplexes in the region is currently considering administration), although some gyms are expanding.

4.5.2 The scale of vacancy within some buildings (particularly shopping malls as noted), streets and centres in some locations is now at a level where diversification into other sectors beyond leisure is emerging. This includes a range of residential types and tenures, recreation and community use.

4.6 Summary

4.6.1 The retail sector has undergone rapid change in response to market concentration and online shopping, accelerated over the past four years by a pandemic and an inflation-and-interest rate cycle which affected consumers, retailers and landlords/developers. The long-term structural trends were reasonably well anticipated by former Clydeplan 2017, although the pace and scale of change exceeds most expectations from that period.

4.6.2 Comparison shopping is strategic and is forecast to grow (see Section 6), but demand for floorspace has fallen and the market is de-malling and diversifying as online shopping grows and multiple retailers have failed or consolidated, particularly larger department / variety stores. Modern, accessible retail parks are diversifying and succeeding in this market.

4.6.3 Convenience shopping is not strategic although the combined impact upon locations is of strategic interest. It is not growing but is highly competitive among brands at the local level and attracts new investment, particularly from discount grocers and in new neighbourhood shopping parades.

4.6.4 Leisure uses remain part of the mix to drive footfall and consumer spend, although in comparison with the casual dining, cinemas and health clubs cycle of the past, the current market is somewhat narrower and focused either on prime locations or coffee and

fast food chains (often in a drive-thru format alongside other uses) with some gyms also active.

4.6.5 The fundamental change to the Region's retail geography is that the loss of multiple retailers has migrated up the hierarchy into what were regarded as strategic centres, particularly those with covered malls which had concentrations of those brands and are inflexible/ costly to adapt. Clydeplan did anticipate to an extent that centres "in the middle" could need to work hard to maintain their positions. Glasgow City Centre is at the apex of the regional retail market and remains one of the UK's most investible centres but is not immune to this market contraction. Many smaller towns on the other hand have largely recovered to provide more localised shopping and services. Market evidence for these trends is presented in Section 5.

5 Glasgow City Region retail market

5.1 Regional retail economy

5.1.1 As demonstrated in Section 2, convenience and comparison retail expenditure in the Glasgow City Region is worth a combined £9-10 billion (PMA £10.26bn). The sector comprised 4,885 businesses in 2023 which is 10% of all businesses in the Region (ONS, UK Business Count).

5.1.2 Regional employment in the retail sector has contracted in recent years, by -2% 2015-19 and a further -3% 2019-22. The latter period includes the pandemic which affect comparison goods shopping in particular through tiered protection restrictions which enforced stores closures.

5.1.3 There is a concentration of retail activity in Glasgow City which has 2,295 (47%) of the region's retail businesses. Glasgow City also experienced a much sharper retail employment decline 2019-22 at -9%, potentially reflecting its higher proportion of comparison shops being affected by pandemic closures and transport and working restrictions.

5.2 Glasgow City Centre retail

5.2.1 Glasgow city centre sits at the apex of the retail market. That apex position is abundantly clear in the city centre's commercial scale, brand representation, turnover, values and new retail development over the long term. Independent analysts PMA rank Glasgow 1st outside of London for total catchment and 2nd for the volume and quality of non-food retailing⁷ including fashion and also for food retailing.

5.2.2 However, even in the city centre the steady growth of online shopping has diluted retail performance and reduced the total amount of city centre floorspace required. This is seen in the closures of department/variety stores such as Debenhams, Watt Bros, BHS and M&S and a range of fashion chains contracting, closing or consolidating. A contraction and reinvestment process is underway comprising both improved shopping space around the prime Buchanan Street corridor and alternative uses for secondary pitches and buildings such as former variety and department stores, particularly along Sauchiehall Street and east Argyle Street).

5.2.3 Market analysts PMA identify the city centre prime retail pitch as running from McLellan Works in the west mid-way along Sauchiehall Street, via Buchanan Galleries, down Buchanan Street and taking in Renfield Street, St Enoch Centre, Ingram Street, east Argyle Street and Trongate up to Candleriggs. Much of this area is defined by pedestrianisation or enhanced public realm and to an extent by the four enclosed shopping malls (the other two being the Sauchiehall Centre although that mall is now removed and all units are street-facing, and the speciality centre Prince Square behind Buchanan Street). Total retail floorspace with the prime shopping area is estimated by PMA at 0.279 million sq.m.

5.2.4 The city centre retailer base is exceptionally large including extensive coverage by fashion and footwear brands. While a number of department stores, variety stores and fashion chains as well as some casual dining chains have closed in the city centre, these

⁷ Glasgow was in 1st place but lost that position to Edinburgh in 2021 with the opening of the St James Quarter.

closures and a wide range of fashion withdrawals such as the former Arcadia brands are in line with national trends. Flagship department stores John Lewis and House of Fraser continue to trade in Buchanan Galleries and on Buchanan Street respectively.

5.2.5 Most major chain stores are represented in the city centre. The 2023 multiple retailer count across a wider area defined by GOAD as Glasgow Central is 485. The area is overweight in national terms in comparison retailers and leisure services, but underweight in convenience shopping and in retail, financial and business services. Some major chains are (or were) represented more than once in the core Glasgow city centre retail area, which has proven to be a vulnerability with closures for example by M&S and Next to focus on one store each.

5.2.6 PMA records Glasgow city centre's vacancy rate as 16.3% of units at the end of 2023, which is below their national average of 19.5% of units as measured across 200 centres. Vacancies in the prime area are much lower at 7.7% and only two units were available on prime Buchanan Street. A concentric vacancy pattern moving out from the prime retail core is indicated.

5.2.7 Prime Zone A (frontage) retail rents on Buchanan Street are reported at £275 per sq.ft. This is a 14% decline since 2017 compared with a national average decline of 36% across PMA's centres. Lettings to Pandora and MAC on Buchanan Street in early 2024 are reported to have reached and exceeded £300 per sq.ft., indicating further market recovery on the prime pitch. Rents for other locations and towns can be far lower than these prime levels (see below).

5.3 Town Centres

5.3.1 The Glasgow City Region contains a wide range of town centres including in the City itself and in many larger and smaller towns, some of which were classified by Clydeplan as strategically important for the region. As noted in Section 4, those strategic town centre locations are the most affected by the pincer movement of the concentration of retailing into larger destinations and the shift towards online shopping.

5.3.2 Town centres across the region do continue to remain popular for independent comparison retailing, basket convenience shopping, local services and local leisure activities. This has helped to ensure reasonable occupancy levels in many locations, even as department and variety stores and national retailers have failed or retrenched to the largest destinations only. Where strategic centres have lost market position, this reflects their former reliance on those retailers, particularly in older covered malls where larger brands were concentrated. Cumbernauld was an early indicator of these trends as it lost market position to Glasgow's growth and to a lesser extent to Stirling's earlier expansion (now also stopped).

5.3.3 Remaining multiple chains widely represented across the town centres tend to be convenience shops, pharmacies, coffee outlets, bars, fast food, gambling, some remaining financial services and a now more limited representation by comparison goods retailers. Additionally, local retailers and services in traditional shop units across the town centres include estate agents and financial & professional services, jewellers and gifts/florists, charity shops, personal services (hair & beauty, tattooists), and in particular food & drink outlets – again with less comparison goods in the local retailing mix. Services such as banks, building societies, travel agents, and insurance companies were once very heavily represented across the towns but are now some way into their shift online.

5.3.4 Some town centres have undertaken a lateral diversification through adjacent modern retail parks and/or superstores. These include Port Glasgow, Airdrie and Coatbridge. Non-retail commercial expansions of this type can also be seen, for example a number of food & beverage developments abutting Cumbernauld town centre (as well as superstores). While these expansions offer the potential for more sustainable transport and linked trips, the extent to which that happens or the adjoining modern developments simply capture the trade probably varies and would require local research into shopping patterns.

5.3.5 In other situations, where the modern retail park is edge-of-town on a trunk road and has a significant comparison goods elements within a wider bulky goods/ grocery/ leisure mix, it is more likely to compete with rather than complement the town centre. As noted above, in UK terms the region is overweight in this type of commercial location.

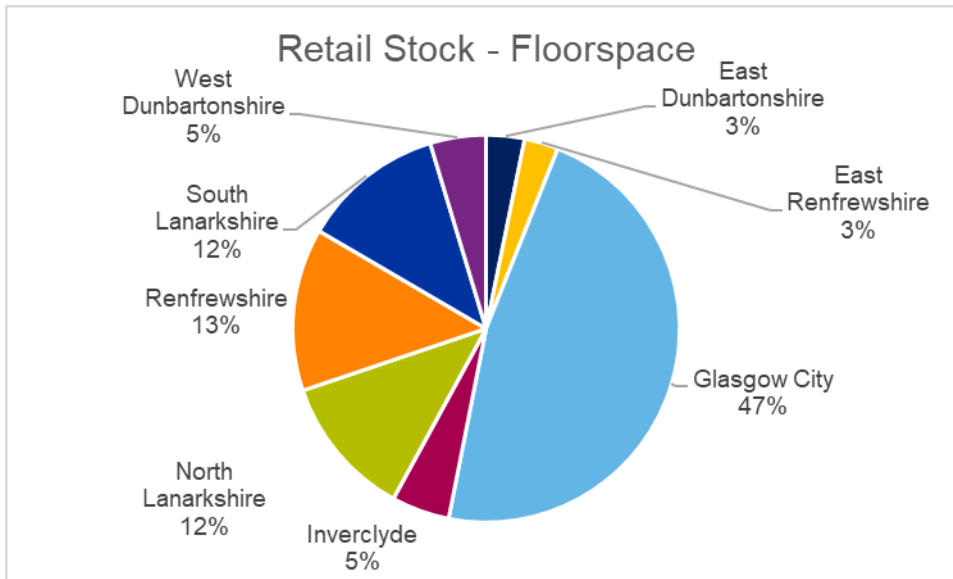
5.3.6 Among the centres are three notable edge-city major developments – Braehead (covered mall west of city with adjoining retail park), Silverburn (covered mall south-west) and Glasgow Fort (open retail park with some weather protection to the east). These are very large and purpose-built, have motorway access and are relatively modern compared with some of the town centre malls. The quality and scale of these makes them intervening opportunities in the retail hierarchy, capturing custom from both Glasgow and the immediately adjoining local authority areas. Notably, these are also likely to be preferred locations for any multiple retailers which are expanding, due to their formats and market positions distributed around the city edge.

5.3.7 In considering the ongoing and future adaptation of the region's town centres, the crux is the extent to which they were dependent on older, purpose-built, multi-storey shopping centres dominated by department, variety and multiple retailers (typically fashion) many of which are no longer in that market:

- Town centres with a formerly strategic retail role now at various stages of 'de-malling' include Clydebank, East Kilbride, Cumbernauld, Greenock, Paisley and Hamilton. These will require substantial, long term investment and in some cases public sector intervention. The analysis of retail floorspace later in this report confirms the extent to which adaptation has already happened or is planned.
- A mid-tier of larger towns with more modest, low-rise urban malls was less dependent on those top tier retailers, but still requires reinvestment or adaptation, such as Motherwell, Dumbarton, Kirkintilloch and Airdrie. Some mall adaptation simply involves a resetting of rents and terms to reflect a different occupier mix, for example at Parkhead Forge.
- The next tier of traditional and Glasgow town centres, from Lanark in the south to Kilsyth in the north, has already largely adapted to the loss of any national multiples through their inherent adaptability and resetting of rents to accommodate a broad mix of local uses. The resilience and diversity of each town centre's mix is often a reflection of their geography, size, the relative affluence of the immediate catchment and competing modern centres. Traditional town centres are also more adaptable at their edges to alternative uses such as residential, as is currently being pursued by town centre strategies and is recognised in 15-minute neighbourhoods, allowing the overall retail footprint to adapt to structural market changes.

5.3.8 The next section considers aggregate regional supply and demand for retail property, followed by local market indicators and trends for the region's strategic centres.

Figure 5.1



Source: Ryden / CoStar

5.5 Retail supply

5.5.1 There is a current supply of 139,500 sq.m. of retail space in 540 units actively being marketed in Glasgow City Region. This indicates a low marketed floorspace vacancy rate of 3% (see supply *floorspace* chart Figure 5.2). Analysing by the marketed *number of units* rather than floorspace shows a higher vacancy rate of 7% (Figure 5.3). On average across the region, marketed units are smaller than occupied units, as very large retail units such as superstores are purpose-built for single occupiers.

Figure 5.2

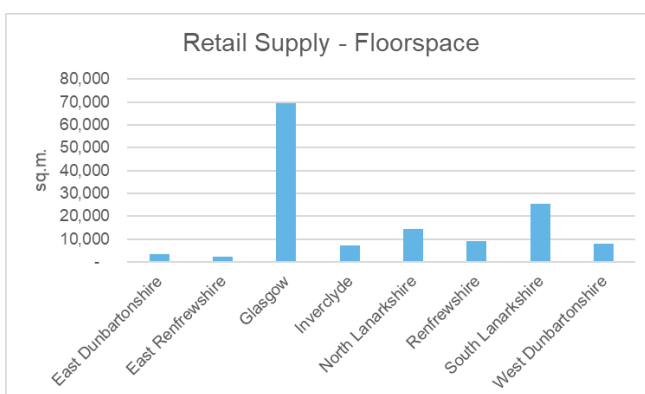


Figure 5.3



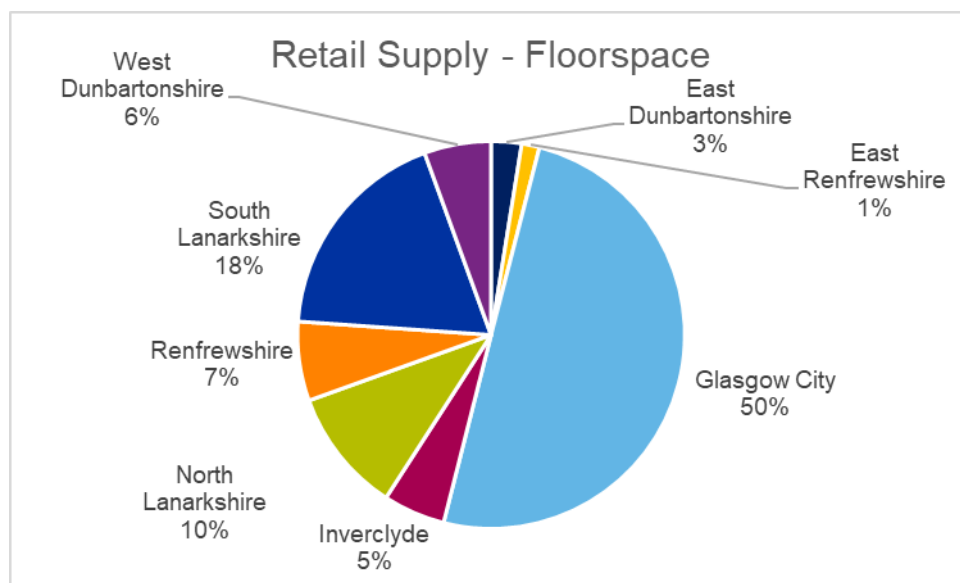
5.5.2 A further 24,000 sq.m. of retail floorspace in 90 units is currently under offer across the Region, indicating an active market. The median marketing period for retail properties in the Region before securing a new occupier rose from 8.4 months at the start of 2020 to 14.9 months in 2021 during the pandemic. This has fallen back again to 7.6 months currently which is the shortest marketing period recorded since the time series began in 2014 and is a signal of a healthy market.

5.5.3 In line with its share of all retail floorspace in Figure 5.1, Glasgow City also has the largest volume of retail vacancy at 50% of the regional total both by floorspace (c.70,000 sq.m.) and numbers of units being marketed (269 units)- see Figure 5.4. The marketed vacancy rates for the other 7 local authority areas are (the local shares of marketed retail floorspace are shown on the pie chart):

- South Lanarkshire 18% of marketed floorspace and 11% of units; the overweight supply of floorspace aligns with comments elsewhere in this report about the requirement to remodel town centre stock in East Kilbride and Hamilton.
- North Lanarkshire has 10% of marketed floorspace and 9% of units
- Renfrewshire has 7% of marketed floorspace and 11% of units
- West Dunbartonshire has 6% of marketed floorspace and 5% of units
- Inverclyde has 5% of marketed floorspace and 8% of units (indicating more small vacant units than the regional average)
- East Dunbartonshire has 3% of marketed floorspace and 4% of units
- East Renfrewshire has 1% of marketed floorspace and 3% of units (again indicating more small vacant units than the regional average).

The vast majority of marketed units are available for lease rather than for sale.

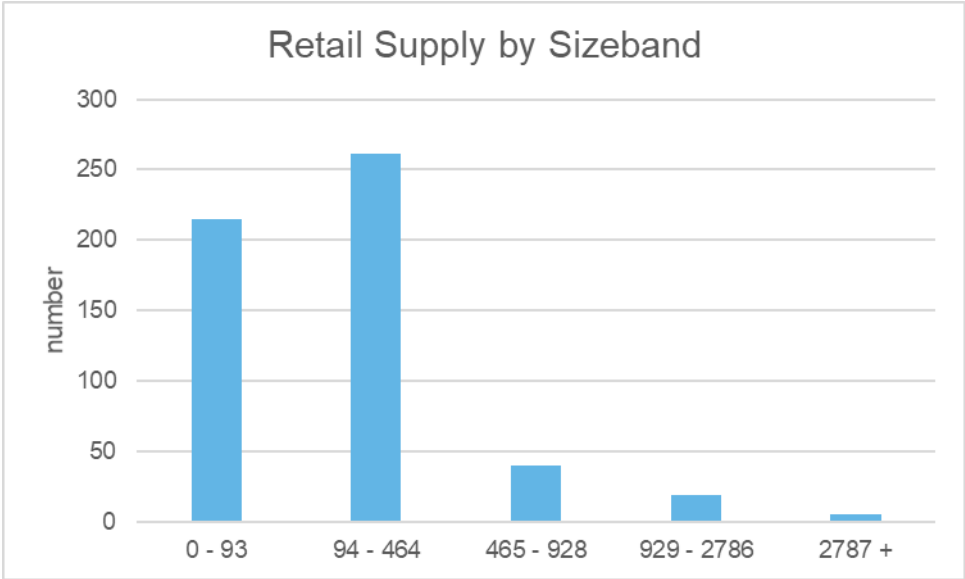
Figure 5.4



Source: Ryden / CoStar/ Marketing Agents

5.5.4 Analysing the 540 marketed retail units by size band confirms the market skews towards standard shop units and smaller retail warehouse units- see Figure 5.5. Eighty-eight percent of marketed units are smaller than 465 sq.m. (5,000 sq.ft.), as illustrated on the bar chart. The smallest size band for units of up to 93 sq.m. (1,000 sq.ft.) accounts for 40% of the current supply and the next size band up covering 94 – 464 sq.m. contains 48%. The mean size of retail unit currently on the market in the Region is 258 sq.m.

Figure 5.5



Source: Ryden / CoStar/ Marketing Agents

5.5.5 Figures 5.6 and 5.7 analyse the types of retail unit currently on the market, firstly by floorspace then by numbers of units. Both show a broadly similar distribution. The majority of available units are either in purpose-built shopping centres (174) or are standard high street-type units (235). Comparing the two charts does indicate the on-street units on the market are of slightly smaller average size (195 sq.m.) than the shopping centres units (c.250 sq.m.). Retail park / warehouse units, leisure properties and miscellaneous and unknown units make up the balance of the marketed supply.

Figure 5.6

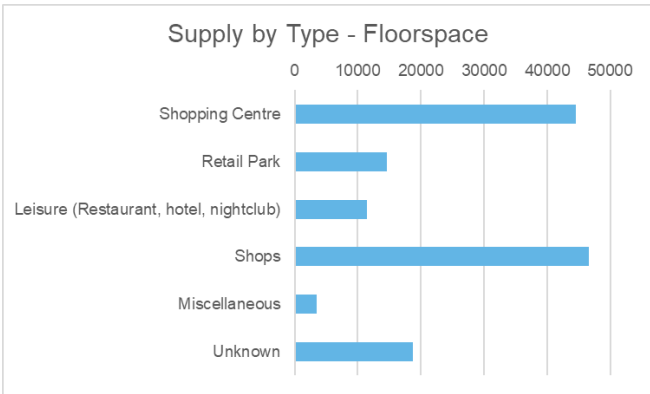
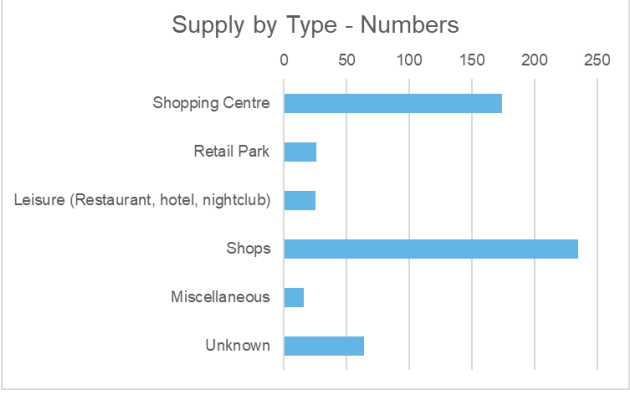


Figure 5.7











Source: Ryden / CoStar

5.4.6 Taking the number of units marketed and under offer together and considering the size ranges and locations on offer, while it cannot be shown conclusively that there is adequate choice for every potential requirement in every location, the numbers and scale of marketed retail units do not imply any immediate market constraint at this time.

5.4.7 Table 5.1 expands upon the supply analysis with a representative sample of marketed retail units from around the Region. These are a mix of typical high street units and purpose-built units within shopping malls (some such as the Paisley Centre have multiple vacancies). Most fall within the smaller size ranges indicated above, although some medium-sized units of c.500-1,000 sq.m. are also available. Rents range from very low monthly all-inclusive rates up to c.£400-500 per sq.m. (c.£40-50 per sq.ft.) for stronger retail pitches in popular centres. Many of the occupiers of smaller units on lower rents will fall within the scope of the Small Business Bonus scheme and qualify for reduced or zero non-domestic rates.

Table 5.1 Examples of retail units currently on the market

ADDRESS		SIZE SQ.M. (SQ.FT.)	DETAILS
22 Douglas Street, Milngavie		1,100 (11,844)	Large open plan sales area over ground floor with first floor provides toilets, staff accommodation and storage. New 5-year FRI lease at £69,500 pa
The Avenue Shopping Centre, Newton Mearns		104 (1,116)	Unit 12B available for lease at £35,000 pa Unit 27 available for lease at £45,000 pa
35 Argyle Street, Glasgow		674 (7,260)	Prime retail unit for lease at £125,000 pa. Multi-level trading over ground and first floors. Class 1A consent, also suitable for Class 3
204 London Road, Glasgow		79 (856)	Ground floor shop unit within a two storey sandstone property. For lease £12,500 pa or May sell £120,000
124/126 Byres Road, Glasgow		121 (1,303)	Ground floor retail unit in a traditional four storey tenement building with residential above. For lease £56,000 pa. Former Casey's Convenience Store/ Packhams Deli, with off sales liquor licence
775 Shettleston Road, Glasgow		122 (1,308)	Terraced retail unit, currently fitted as an office. For lease £13,500 pa
395 Clarkston Road, Muirhead, Glasgow		69 (743)	Ground floor retail unit for lease at £16,000 pa
Waterfront Retail Park, Greenock		302 (3,250) 930 (10,035)	Unit 5 and Unit 7 available for lease.
6 Brandon Parade South, Motherwell		190 (2,044)	Ground floor retail unit. For lease £26,500 pa.
Coatbridge Shopping Centre, Coatbridge		19,317	Six retail units for lease from 79 sq.m. (849 sq.ft.) to 539 sq.m. (5,800 sq.ft.) at rents from £12,500 pa to £35,000 pa

The Paisley Shopping Centre, Paisley		From 21 (231)	Fourteen units totalling 17,111 sq.ft. from 231 – 3,883 sq.ft. Available for lease on 12 month leases on an all-inclusive, monthly basis from £945 - £995 per month.
26 Causeyside Street, Paisley		103 (1,110)	Ground floor unit. For sale £150,000
Unit 3, XSITE Braehead		472 (5,081)	Ground floor external facing retail unit for lease. 5 further units and 1 kiosk for lease here.
Unit 6 Princes Mall, East Kilbride Shopping Centre, East Kilbride		316 (3,403)	For lease. Former Bonmarche unit. One of 19 units for lease in the centre
3 Allanton Gardens, Fernigiers, Hamilton		84 (902)	New build retail unit subtitle for a variety of uses. Class 1A. For lease £15,000 pa
17 Britannia Way, Clydebank		1,424 (15,331)	Available for sublease or assignation, with the existing expiry on 5 December 2025. Rent £250,000 pa. Former Argos unit

Source: Ryden / CoStar

5.6 Retailer demand

5.6.1 This section analyses take-up of retail property across the Region in the forms of (principally) lettings and (also) sales. It also considers outstanding demand for retailer property in the form of retailer requirements.

5.6.2 A total of c. 417,000 sq.m. (c. 4.5 million sq.ft.) of retail space (using the broad definitions set out at 5.3.1) in 1,878 units was taken-up from January 2019 to March 2024. This is equivalent to an annual average retail take-up of 79,000 sq.m. in 358 units. The mean size of unit taken-up is 220 sq.m. which is not dissimilar to the 258 sq.m. mean unit size on the market. As above there may be specific instances of unmet demand, but there is no immediate size mismatch between supply and take-up of units.

5.6.3 Glasgow City accounted for the most take-up at c. 242,000 sq.m. in 995 units. At 51% and 53% respectively of the regional totals, this is in line with the city's total retail stock and supply. Market shares of regional retail take-up for the other 7 local authority areas are shown in Figures 5.8 and 5. by floorspace and numbers of units):

- South Lanarkshire delivered 13% of floorspace and 12% of unit take-up
- North Lanarkshire delivered 11% of floorspace and 10% of unit take-up
- Renfrewshire delivered 8% of floorspace take-up and 6% of unit take-up
- West Dunbartonshire delivered 9% of floorspace take-up and 5% of unit take-up (indicating a mean unit size approaching double that of the regional, perhaps skewed by larger individual transaction/s)

- Inverclyde delivered 6% of floorspace take-up and 9% of unit take-up (as with supply this indicates a market based upon units smaller than the regional average)
- East Dunbartonshire delivered 2% of both floorspace and unit take-up
- Similarly, East Renfrewshire also delivered 2% of both floorspace and unit take-up

Again, at a strategic, regional market level there are no obvious mismatches whereby a local authority area has a much lower share of supply than its proven medium-term take-up, or indeed vice versa.

At a local centre level however, there are clear mismatches in some locations between ongoing reduced demand from prime multiple retailers and the legacy scale of retail provision, which are being dealt with through diversification, (planned) de-malling and alternative uses.

Figure 5.8

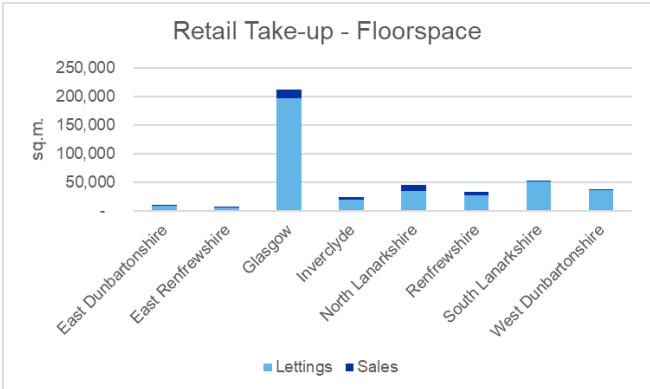
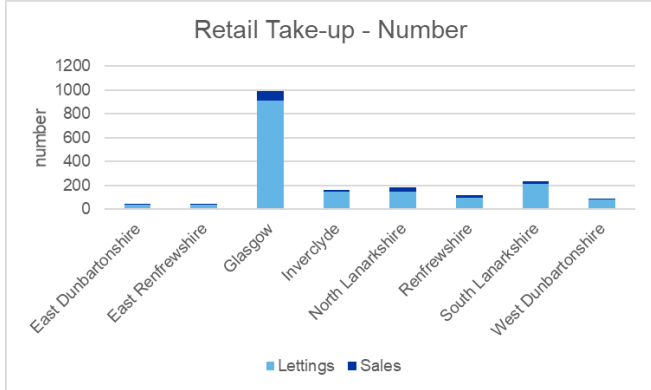


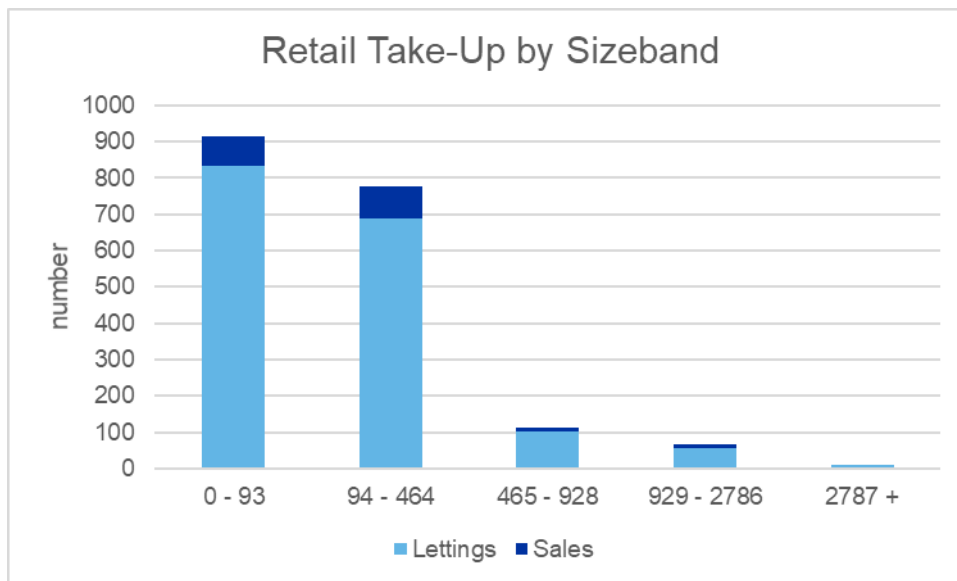
Figure 5.9



Source: Ryden / CoStar

5.6.4 As with the supply of retail units, smaller properties have delivered the most take-up. As illustrated in Figure 5.10 the smallest sizeband 0 – 93 sq.m. accounted for 49% of retail unit take-up and the next sizeband up 94 – 464 sq.m. accounted for a further 41%. Together these two sizebands contained 90% of all retail transactions since January 2019, which is very close to their 88% share of currently marketed supply and again indicates some alignment of demand and supply, at least at the strategic regional level.

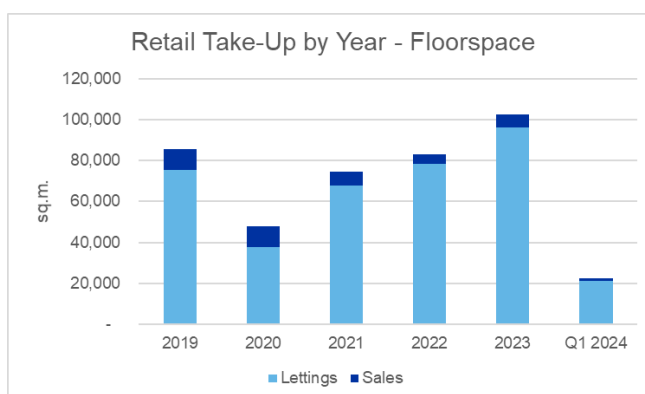
Figure 5.10



Source: Ryden / CoStar

5.6.5 The following charts (Figures 5.11 and 5.12) analyse take-up of retail units over time, again starting at January 2019. Both floorspace and unit take-up fell from 2019 into 2020 due to the pandemic and its enforced closures and restrictions on comparison shopping and leisure activities. Notably, both floorspace and unit take-up then rose year-on-year into 2021, 2022 and again in 2023 when take-up hit a high point of 102,000 sq.m. in 412 units. Quarter 1 2024 also delivered an active start to the current year for the retail market. This rising demand may be surprising in the context of the market trends set out in Section 4 but does offer a positive story on the adaptability of (most of) the retail stock to accommodate diverse occupiers.

Figure 5.11



Source: Ryden / CoStar

Figure 5.12



5.6.6 Table 5.2 provides selected examples of recent retail transactions from across the Region. A mix of traditional high street and shopping centre transactions is shown alongside one drive-thru unit. Units taken range in size from 27 sq.m. in Airdrie town centre

to more than 2,000 sq.m. in Glasgow city centre and in Motherwell. Lease lengths range from 2-years to 15-years. The transactions again highlight the sheer range of types of business taking premises, from fashion and footwear to outdoors, jewellery and gifts, electronics, personal and professional services, gambling, food & beverage and arts & culture.

Table 5.2 Examples of transactions

ADDRESS		SIZE SQ.M. (SQ.FT.)	DETAILS
Unit 1, 190 Milngavie Road, Bearsden		322 (3,467)	Let in November 2023 to West End Outdoors
13 Eaglesham Road, Clarkston		63 (681)	Let in June 2024 to Skinz Aesthetics Ltd on a 10-year lease at £15,500 pa
147-149 Sauchiehall Street, Glasgow		110 (1,185)	Let in May 2024 to CEX at £40,000 pa
Princes Square, Sauchiehall Street, Glasgow		125 (1,343)	Let in March 2024 to All Saints on a 2-year lease
		68 (736)	Lease renewal in March 2024 to Dower & Hall on a 5-year lease
		571 (6,148)	Let in February 2024 to Maison by Glaschu on a 20-year lease
St Enoch Centre, Glasgow		235 (2,537)	Let in February 2024 to Blooms on a 10-year lease
		190 (2,047)	Let in April 2024 to Shuropody on a 5-year lease
		76 (824)	Let in February 2024 to Lovisa on a 10-year lease
713 Great Western Road, Glasgow		200 (2,160)	Lease renewal in February 2024 to Anime Gallery on a 5-year lease
		2,088 (22,480)	Let in January 2024 to UNIQLO on a 10-year lease
1034 Pollokshaws Road, Shawlands, Glasgow		94 (1,016)	Let in March 2024 to Hinba Coffee Roasters on a 10-year lease at £18,000 pa
238 Battlefield Road, Glasgow		102 (1,103)	Lease assignment in March 2024 to Coco House for 7-years at £23,000 paq
Silverburn Shopping Centre, Pollok, Glasgow		91 (985)	Let in February 2024 to Localkilts Ltd on a 5-year lease at £18,000 pa
		4,366 (47,000)	Let in June 2024 to Zara on a 15-year lease
		334 (3,600)	Let in December 2023 to Costa Coffee on a 10-year lease
2 Cartsburn Street, Greenock		248 (2,674)	Let in March 2023 to The White Company on a 5-year lease
		167 (1,800)	Let in January 2024 to Greggs on a 15-year lease at £92,500 pa. Drive thru.
Motherwell Shopping Centre, Motherwell		117 (1,259)	Let in March 2024 to ENVI at £25,000 pa
		2090 (22,500)	Let in March 2024 to One Beyond
59 South Bridge Street, Airdrie		27 (287)	Let in March 2024 to Phonegeekers on a 5-year lease at £8,400 pa

77 Causeside Street, Paisley		74 (794)	Let in May 2024 to Koture Hair & Beauty Ltd on a 5-year lease at £11,000 pa
Braehead Shopping Centre, Braehead		648 (6,976) 122 (1,318) 235 (2,535)	Let in April 2024 to Mango on a 10-year lease Let in March 2024 to Chopstix Lease renewal in February 2024 to The Works on a 5-year lease
Hamilton Towers, Hamilton		128 (1,384)	Let in April 2024 to Gloss Nails and Beauty at £15,000 pa
East Kilbride Shopping Centre, East Kilbride		190 (2,047) 205 (2,208) 936 (10,084)	Let in March 2024 to Shuropody on a 5-year lease Lease renewal in February 2024 to William Hill on a 3-year lease Let in November 2023 to Blue Inc on a 2-year lease Let in October 2023 to Pandora on a 5-year lease
141 High Street, Dumbarton		114 (1,226) 48 (515)	Let in January 2024 to Line of Defence (Inn Defence) on a 5-year lease at £7,000 pa

Source: Ryden / CoStar

5.7 Local authority areas and strategic centres

5.7.1 Table 5.3 provides comparative retail market data across the 8 constituent local authority areas which make up the Glasgow City Region. The four take-up columns and the current supply columns were discussed above.

5.7.2 The marketed availability is very low at 1-3% within individual local authority areas and 3% for the Region as a whole. As noted above, this is likely due mainly to owner-occupied large units such as superstores. The actual supply of units on the market in many locations is not unusually high. It is also notable from the floorspace data in Section 6 that substantial reductions have already been recorded across the Region's comparison goods stock (-14% from the estimates which have been generated to date), meaning that a proportion of market adjustment has already happened. However, some of the proposals are still intentions to reuse for alternative purposes rather than completed projects.

Table 5.3 Retail markets across the City Region

LOCAL AUTHORITY AREA	5-YEAR TAKE-UP (SQ.M.)	ANNUAL AVERAGE (SQ.M.)	5-YEAR TAKE-UP (NUMBER)	ANNUAL AVERAGE (NUMBER)	CURRENT SUPPLY (SQ.M.)	MARKETED AVAILABILITY %	AVERAGE RENT OVERALL
East Dunbartonshire	9,262	1,764	45	9	3,533	2%	£14.10
East Renfrewshire	7,700	1,467	49	9	2,080	1%	£23.70
Glasgow City	244,243	40,237	994	189	69,619	3%	£22.40
Inverclyde	23,314	4,441	164	31	7,219	3%	£11.80
North Lanarkshire	44,710	8,516	184	35	14,459	2%	£12.50
Renfrewshire	32,338	6,160	117	22	9,220	1%	£12.50
South Lanarkshire	52,440	9,989	235	45	25,514	4%	£9.20

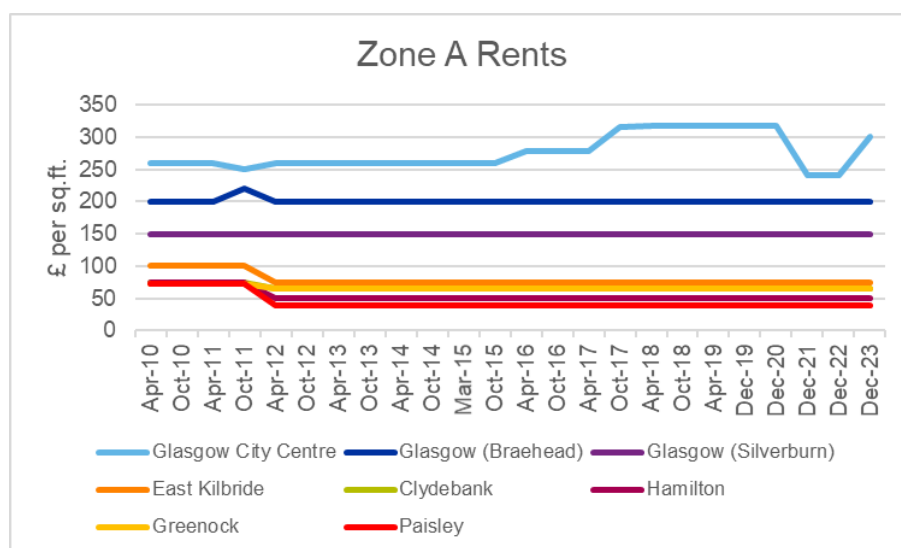
West Dunbartonshire	35,492	6,760	90	17	7,788	3%	£14.90
Glasgow City Region	446,998	85,142	1,879	358	139,429	3%	£17.20

Source: Ryden / CoStar

5.7.3 The rental data in the final column illustrate that, while prime ‘Zone A’ (frontage) rents receive the most comment and analysis, the vast majority of the market is based on much more achievable rental levels. The average retail rents in most locations outside of the city core and prime pitches and parks are £12.50 - £15 per sq.ft. (c.£135 - 160 per sq.m.). At the mean letting size of 220 sq.m. from above, the average tenant would pay around £30,000 – 35,000 per annum plus any service charge plus any non-domestic rates (potentially mitigated by the small business bonus scheme for rents up to £35,000 for more than one property or £20,000 for a single property). For comparison, rents for retail warehouses range from typically £15-20 up to £45 per sq.ft. at Glasgow Fort.

5.7.4 Prime Zone A rents have in fact remained relatively static in recent years due to the challenging market conditions. The centres shown on Figure 5.13 are those which have been in Ryden’s national prime retail rental index over the long term (note that Clydebank is obscured by Greenock as their rents are the same). As noted in Section 5.1, prime rents for Buchanan Street in Glasgow city centre have resumed their positive growth trend due to competition among retailers for that pitch. Other centres have experienced downward pressure and are generally shown as flat on the chart due to lack of sustained open market evidence. Where the rental lines for a centre are flat then the real terms declines over the 24 years are substantial against consumer price inflation of 82%.

Figure 5.13 Prime Zone A Rents



Source: Ryden

5.7.5 Table 5.4 focuses the retail analysis on the Region's strategic centres⁸ rather than on the full local authority areas.

5.7.6 Marketed vacancy rates (floorspace) range from very low to normal at around 6-7%. As above this is measuring only those units which are available, against the stock of all commercial floorspace in the strategic centre including larger purpose-built units and any unmarketed vacancies. The Glasgow city centre figure of 7% is close to PMA's end-2023 vacancy rate of 7.7% cited earlier and does not include department/ variety stores proposed for repurposing. The purpose-built Silverburn and Braehead have very low marketed vacancy as do the traditional town centres of Airdrie, Dumbarton and Lanark – as noted above many such centres have diversified their mix in recent years and most units are occupied.

5.7.7 The examples of multiple retailers for each strategic centre confirming an ongoing presence of these brands in each. However, the mix is now typically more skewed towards convenience and leisure with some comparison due to the retrenchment of department / variety / fashion stores during the most recent market cycle. These trends can be seen in the multiples' opening and closures in the final two columns of the table.

5.7.8 The average rents for each strategic centre are shown in the table. These average rents are well below the prime Zone A rents on the chart. Average rents range from at or around £10 per sq.ft. (£108 per sq.m.) across the smaller centres of Kirkintilloch, Parkhead, Airdrie, Coatbridge, Wishaw (lower), Paisley, Hamilton, Lanark and Dumbarton (slightly higher). Rents at these level reflect significant market adjustment and can bring retail units into the reach of local independent shops and services rather than being the preserve of corporates, and thus encourage good levels of occupancy and overall town centre health.

Table 5.4

Strategic Centres					
AREA & CENTRE	MARKETED VACANCY RATE	MULTIPLE RETAILERS EXAMPLES	AVERAGE RENTS	EXAMPLES OF OPENINGS	EXAMPLES OF CLOSURES
East Dunbartonshire					
Kirkintilloch TC	2.6%	Costa Coffee, Boots, Sainsbury's, WH Smith, Optical Express, Poundstretcher	£10.20	Original Factory Shop, Costa Coffee	Locavore (ethical supermarket), New Look, M & Co, Sandy Smith Butcher, Lulu & Lottie (boutique), Lloyds Pharmacy
East Renfrewshire					
Newton Mearns	1.6%	Asda, Superdrug, Card Factory, Specsavers, Boots, Costa, Waterstones	£36	M & CO (new ownership), Studio two six one, Bon Marche	M & Co, Optical Express
Glasgow City					
City Centre	7%	Marks & Spencer, Next, Boots, Zara, Hotel Chocolat, Office, Hobbs, The White	£28	Holland & Barrett, All Saints (relocation), Tag Heuer, Søstrene Grene, Ann	Paperchase, Pen Shop, Lulu Lemon, Body Shop

⁸ Omitting from the former Clydeplan 2017 list of strategic centres Barrhead which has minimal retail presence and Ravenscraig which is not built yet.

Pollok/ Silverburn	<1%	Company H & M, Marks & Spencer, Trespass, Boots, River Island, Zara, Next, Smiggle	£65	Summers, Mango All Saints, Zara, Rituals, Victoria's Secret, Menkind, Costa Coffee, White Stuff	Pure Spa, Debenhams, Body Shop, Stack and Still, Paperchase
Easterhouse (incl. Glasgow Fort)	1.6%	Smyths Toys, TK Maxx, Next, Hobbycraft, Superdrug, Skechers, Schuh, Zara	£35	Primark – opening, Menkind, Leopardo Pizza, Forty Clothing, Mango, Hotel Chocolat	Body Shop, DB1 Clothing, Trespass
Parkhead	5.9%	Specsavers, Holland & Barrett, Costa, Savers, Trespass, Quiz	£10	Food Warehouse, Booffi (restaurant), Spanish Scents, proposed - Home of Asia in former Tesco	Tesco
Shawlands	1.6%	Iceland, B & M, Superdrug, Boots, Sainsbury's, Poundstretcher	£16	Finnieston Clothing, Rude Cookies	Barclays, Neighbourhood, Oscar Bar & Kitchen
Partick/ Byres Road	2.8%	M & S Simply Food, Ryman, Iceland, Oliver Bonas, Costa	£29.80	Greggs relocation, Black Sheep Coffee, Valaria Patisserie	Paperchase, Caledonian Countrywear
Inverclyde					
Greenock	4.6%	B & M, Home Bargains, New Look, Bon Marche, The Works, Specsavers	£12.60	Salvation Army, Bird Chicken Shop, Scotts Restaurant	Poundstretcher, West End Bar & Kitchen, Biggie Scoopz
North Lanarkshire					
Airdrie	1%	Boots, Card Factory, Savers, Poundland, WH Smith, Aldi, Superdrug	£10	Poundland, Lidl	Peacocks, Poundstretcher, Holland & Barrett
Coatbridge	3.4%	Costa, Matalan, Next, Food Warehouse, M & S Simply Food, Deichmann	£11.30	Greggs, Aldi	Spicy Hut, Argos
Cumbernauld	5.8%	Greggs, Iceland, Tesco, Costa, Superdrug, River Island, Poundstretcher,	£31.70	Home Bargains, Aldi, Love to Travel (relocation)	New Look, Bonmarche
Motherwell	2.8%	Savers, JD Sports, New Look, Subway, Shoe Zone, Greggs, Boots, Specsavers	£15.10	One Beyond, PDSA	Argos, Wilko
Wishaw	2.8%	Boots, Savers, Specsavers, Poundland, Iceland,	£7.40	RaceTrackPitstop, Tubbees Dessert Lab, Love to Travel, Lidl	Young Trend, M & Co

		Bonmarche			
Renfrewshire					
Paisley	3.7%	New Look, Bon Marche, Boots, Iceland, The Range, Lidl, Superdrug, Savers, Optical Express	£11	JD Sports, Hobbycraft,	Blend Coffee Lounge, M & Co
Braehead	1.5%	Clarks, Waterstones, Trespass, Kiko Milano, Next, Sports Direct, Chopstix, Lush, Schuh	£24.90	The Fragrance Shop, Bodycare, Kiko Milano	Body Shop, Clintons, Paperchase,
South Lanarkshire					
East Kilbride	2%	Sports Direct, HMV, New Look, Greggs, Superdrug, TK Maxx, Matalan, Boots	£18.40	Matalan	Debenhams, BHS, M & S, Body Shop, Bon Marche,
Hamilton	7.3%	Boots, Next, Nandos, Claires, Primark	£9.20	Aldi, Home Bargains	Pizza Hut, Argos, Clarks
Lanark	<1%	B & M, Lidl, Savers, Hays Travel	£10.50	Original Factory Shop, Crease Free Ironing	M & Co
West Dunbartonshire					
Clydebank	4.9%	Asda, B & M, Bodycare, Bonmarche, Boots, Card Factory, Costa	£15.50	Booffi (restaurant), Barnardo's, Smyths Toys, Sense Scotland	KFC, Wilko, Argos
Dumbarton	1.2%	Poundland, Greggs, Farmfoods	£12.20	Inn Defence, PDSA	Photo Ecosse

Source: Ryden / CoStar/ Websites

5.8 Retailer requirements

5.8.1 Retailer requirements are an important indicator of market demand for representation in a town. At the high point of the retail market in the early 2000s, small towns would typically have a number of retailers interested, the strategic centres would have perhaps 20-40 listed, and Glasgow could have 100 or more retailers (and leisure operators) on its active list.

5.8.2 Requirements following the many corporate failures and retrenchments are more piecemeal. Ryden assembles data on this directly from retailers and agents where feasible and also utilises an independent source, *The Requirements List*.

5.8.3 A total of 121 current retail requirements are noted for Glasgow City Region. These comprises general retailers (ie cosmetics, clothing, jewellery and gifts), discount supermarket / convenience stores, fast food chains, hotels and restaurants, charity stores

and destination leisure operators. As noted throughout this report, there is continuing demand for retail premises but nowhere near the historic scale of department/ variety/ fashion store activity.

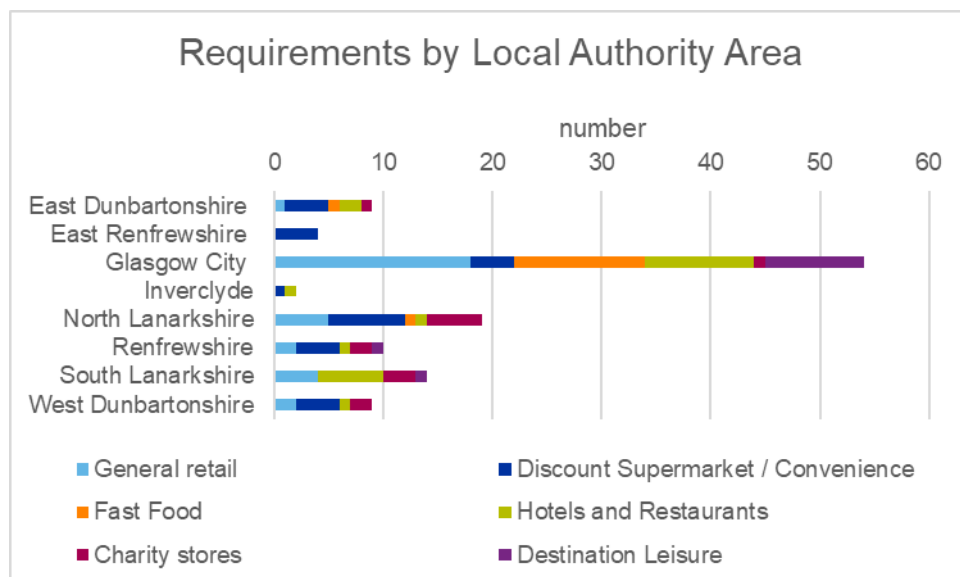
5.8.4 The chart in Figure 5.14 and Table 5.5 do not associate individual retailers with specific target locations. Active retailers include The Range, Candy Galore, Prezzybox, Sosander, Poundstretcher, Aldi, Lidl, One O One, Knoops, KFC, Chopstix, Travelodge, Innkeepers Lodge, Premier Inn, All Bar One, Amber Taverns, PDSA, The Chase, JD Gyms, Spiderbox and The Padel Club. Again, diversified demand is clear and many of these will require specific property / site solutions rather than a standard high street shop unit.

5.8.5 Glasgow City attracts more than half of the current retailer requirements, which is in line with its share of all retail stock and market activity. North and South Lanarkshire record the next highest demand, followed by Renfrewshire and West and East Dunbartonshire. These all have a broad mix of types of requirements. By comparison, demand for Inverclyde and East Renfrewshire is low and limited. The table further disaggregates the requirements analysis to show the numbers currently recorded for each strategic centre.

5.8.6 Detailed analysis would be required to understand whether individual requirements can be met within existing available premises in the target locations. As a very general comment, formats such as discount retailing, leisure, food & beverage and hotels in the table often invest in new-build formats although they can and do take existing units too.

5.8.7 Requirements are dynamic and will be removed as individual operators either secure premises or changes their plans, and augmented as existing and new operators add requirements to the searches.

Figure 5.14



Source: Ryden / The Requirement List

Table 5.5 Numbers of retailer requirements

AREA	General retail	Discount Supermarket / convenience	Fast Food	Hotels and Restaurants	Charity stores	Destination Leisure
East Dunbartonshire	1	4		1	1	
Kirkintilloch TC			1	1		
East Renfrewshire		2				
Newton Mearns		2				
Glasgow City	2	2	1	2	1	9
City Centre	10	1	9	5		
Pollok/ Silverburn	6		1	1		
Easterhouse		1				
Parkhead						
Shawlands			1	2		
Partick/ Byers Road						
Inverclyde						
Greenock		1		1		
North Lanarkshire						
Airdrie	1	1	1		1	
Coatbridge	1	1			1	
Cumbernauld		2			1	
Motherwell	2	1		1	1	
Wishaw	1	2			1	
Renfrewshire	1	2				
Paisley		2		1	2	1
Braehead	1					
South Lanarkshire	1			1		
East Kilbride	2			1	1	1
Hamilton	1			3	2	
Lanark				1		
West Dunbartonshire						
Clydebank	1	2				
Dumbarton	1	2		1	2	
Glasgow City Region	32	28	14	22	14	11

Source: Ryden / The Requirement List

5.9 Retail property investment

5.9.1 Investment into retail property helps to deliver development and regeneration. Some development activity and potential is noted in the capacity modelling in section 6. In comparison with previous cycles there is no new shopping centre development. The convenience sector (where major brands often own their stores) is also very muted other than among discount retailers.

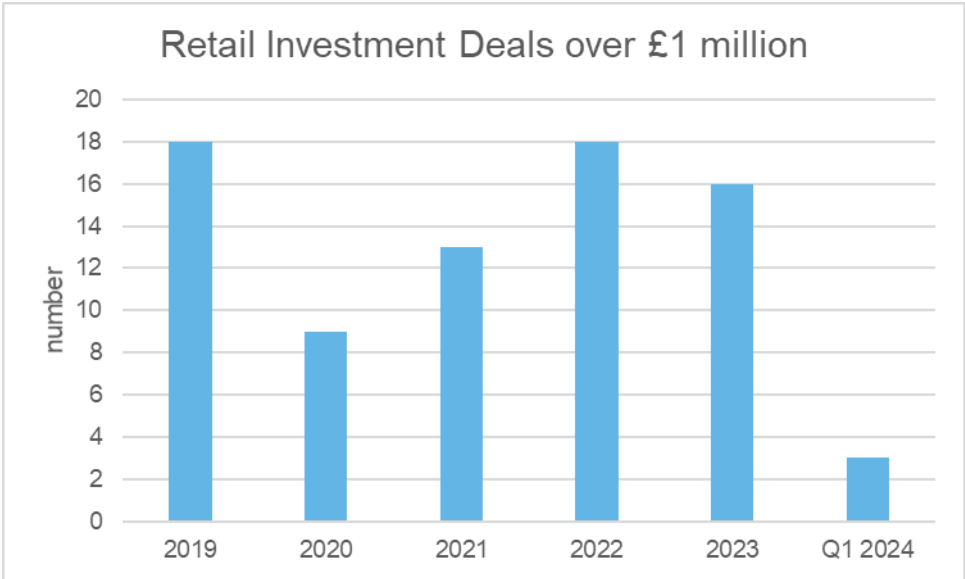
5.9.2 Investment into the sector in the current market is mainly the trading of standing assets (already built and occupied) by a wide range of institutional – pension funds, insurance companies, trusts - investors as well as property companies and private investors.

5.9.3 The retail investment market has been fragile in recent years due to the market changes described in this report compounded by surging interest rates which both depress capital values and increase the costs of debt. This is a very unusual situation in the long run context, where prime retail investments were usually the most expensive commercial assets due to their high occupancy and demand and their prospects for rental growth; indeed retail could often be the catalytic ‘anchor’ use for new urban development and regeneration projects.

5.9.4 Since January 2019 a total of 77 retail investment deals of over £1 million as illustrated in the chart on Figure 5.15 have been recorded in Glasgow City Region. Numbers fell into 2020, but have risen again. These transactions include a mix of retail types for example traditional high street stores, retail parks, shopping centres and supermarkets. The total invested is £712 million, indicating a mean transaction size of £9.25 million.

5.9.5 Examples of retail investment deals from the past year are shown in Table 5.6. These include shopping centres and retail parks along with neighbourhood units. Investment yields range from 5.55% to 12.6%; the spread of yields is very wide ranging from single-let assets with secure income up to multi-let investment requiring active management and investment.

Figure 5.15



Source: Ryden

Table 5.6 Recent retail investment transactions





ADDRESS		DETAILS
Kingsway Retail Park, East Kilbride		Sold to Realty Income Corporation for £16.5 million. It comprises four retail units totalling 5,480 sq.m. (59,000 sq.ft.) leased to The Range, Curry's, Halfords and Pets at Home
Patons Mill Retail Park, Johnstone		Sold to OCO Westend for £7.9 million (7.04%). Comprises two retail warehousing units of 1,593 sq.m. (17,150 sq.ft.) and 1,420 (15,286 sq.ft.), let on long-term leases to Aldi and Home Bargains, alongside the 206 sq.m. (2,222 sq.ft.) drive-thru Starbucks currently occupied by OCO.
Birkenshaw Retail Park, Uddingston		Sold to Elstar Ltd for £3.63 million (10%). Comprises 3 purpose-built retail warehouses totalling 1,926 sq.ft. (20,733 sq.ft.) let to Sofa.com, Natuzzi and ScS at £387,700 pa.
281-283 Byres Road, Glasgow		Sold to Pine Ridge Estates Ltd for £850,000 (7.81%). The 150 sq.m. (1,623 sq.ft.) unit is let to Boots UK Limited until 28 May 2027 at £70,000 pa
Princes Square, Buchanan Street, Glasgow		Sold to M Core for £23.5 million (9.8%). The 10,730 sq.m. (115,500 sq.ft.) Grade B listed shopping centre includes four retail units on Buchanan Street and an inner mall over five levels. Tenants include Levi's, Office, Everyman, Sweaty Betty, H&M, and Space NK
167 – 201 and 203 – 205 Argyle Street, Glasgow		Sold to the Clydebuilt Limited Partnership, a jv between Ediston and Strathclyde Pension Fund for £13 m (12.76%). No 167 - 201 is a 12,136 sq.m. (130,641 sq.ft.) 6-storey retail building, tenants include Sainsburys, Poundland, Bank of Scotland, Card Factory and Pizza Hut. No 203 - 205 totals 505 sq.m. (5,440 sq.ft.) over 5-storeys let to Pizza Hut until September 2026.
B & Q, Tennent Street Retail Park, Coatbridge		Sold to Realty Income Corporation for £21 million (5.55%) as part of a portfolio of 29 properties. The 9,520 sq.m. (102,473 sq.ft.) unit is let to B & Q
156 Main Street, Wishaw		Sold to AJ Bell Trustees Ltd for £440,000 (8.3%). The 306 sq.m. (3,295 sq.ft.) unit is let to Lloyds Pharmacy until April 2038 at a passing rent of £38,000 pa. Sold at auction.
Sainsbury's Supermarket, 10 Darnley Mains Road, Glasgow		Sold to BT Pension Scheme Trustees' for £48.25 million (5.7%). Single-storey retail unit let to Sainsbury's with an unexpired lease term of c. 19 years
Silverburn		March 2022. Sold to Eurofund Group and Henderson Park for £140 million (9.3%)

Source: Ryden / CoStar

5.9.6 As noted, de-malling to create smaller shopping centres with typically a street layout and alternative uses is underway and proposed. Section 6 identifies the loss of at least 14% of the Region’s comparison goods floorspace to date. Across the Region, shopping centres either commencing or proposed for remodelling or removal include those in Greenock, Paisley, Dumbarton, Clydebank, East Kilbride, Hamilton, Cumbernauld and in Glasgow City Centre. Others which are not yet proposed for comprehensive change will still require significant asset management to reposition them.

5.9.7 Table 5.7 provides a round-up of shopping centre investment transactions as one part of the consideration of their future potential. The ‘before’ and ‘after’ positions in the shopping centre investment market are stark: during the early 2010s, shopping centre transactions in the Region included the Piazza Centre in Paisley (8% yield), St Enoch Centre Glasgow (7.5%), East Kilbride Shopping Centre (6.7%), Clyde Shopping Centre, Clydebank (7.5%), The Forge, Parkhead, Glasgow (4.85%, 2006), Motherwell Shopping Centre (7.2%), Silverburn, Glasgow (6%), Regent Shopping Centre, Hamilton (5.7%) and Shawlands Arcade, Glasgow (8.0%). By contrast, the examples since 2020 listed in the table, some of which offer direct comparisons with those earlier transactions, were bought on investment yields of 10-20% to discount their future investment and redevelopment costs (Princes Square and Silverburn are included in the former table as prime assets on lower yields).

Table 5.7 Shopping Centre Investment Transactions

Centre	Photo	Transaction
Oak Mall Shopping Centre, Greenock		February 2021. Sold to Comer Group for £4.3 million (20%). The centre is to be part-demolished.
The Paisley Centre, Paisley		November 2020. Sold to Beyond Retail Property Fund for £2.3 million. The centre is to be repurposed to create a new residential-led mixed-use quarter.
Motherwell Shopping Centre, Motherwell		March 2021. Sold to Signal Capital Partners LLP alongside Edinburgh House Estates for £18.9 million (12.54%)
Hamilton Towers, Hamilton		May 2021. Sold to Hamilton Assets Ltd for £2 million

Triangle, Bishopbriggs		October 2021. Sold to LFCH Property for £1.44 million
The Forge, Parkhead		March 2023. Sold to Midos Group for £13.74 million (18.45%)
Regent Shopping Centre, Hamilton		September 2020. Sold at Auction for £625,000 (25.88%).

5.10 Summary

5.10.1 Retail is a significant economic sector for the Glasgow City Region. While nominal turnover growth has continued and is forecast to increase, employment has not grown and indeed has contracted over the short term.

5.10.2 Glasgow city centre’s apex retail and leisure role means that it is continually investible and tends to benefit from increased market concentration, but it is not immune from the corporate failures and store rationalisations which have afflicted the sector as online shopping continues to eat into comparison expenditure. The loss of prominent department and variety stores from the city centre is particularly noticeable, with only two now left trading. The absolute prime Buchanan Street is holding up well in this market and is anchored at either end by those department stores. Vacancy rates are concentrically higher across the city core. Reinvestment in struggling or failed assets is planned and typically involves a reduction in retail space.

5.10.3 A ‘squeezed middle’ of regional towns has suffered most in the most recent market cycle, particularly inflexible purpose-built shopping malls which were particularly reliant on a complement of branded multiple retailers, including again variety and department stores. The extent to which some of these remain strategic for the Region is questionable. Smaller towns lost their destination multiples role following the Global Financial Crisis and many have now adapted to show a broader mix of local commercial and service uses, typically on rents which are now much lower in real terms.

5.10.4 The winners in the current market cycle are the increasingly diversified warehouse parks which offer convenience, comparison, leisure, food & beverage and click-and-collect retailing. As noted in Section 4, the Region has a comparatively high proportion of retail warehouse space and the shift from bulky goods to other uses is creating what is a high level of ‘High Street’ type competition at these sites.

5.10.5 There is no obvious demand pressure when compared with an extensive regional supply of retail property types, sizes and locations. Local authority shares of retail stock, supply and take-up are balanced. Specific gaps in local markets will attract further demand from purpose-built retail operators such as discounters. Beyond these operator-led developments there is no significant retail development cycle active or anticipated in the region (*see the planning commitments in Section 6*).

6 Quantitative assessment- baseline retail data 2024

6.1 Introduction

6.1.1 This section examines the relationship between the current comparison expenditure and turnover within the eight Council areas in the City Region. It shows the distribution of comparison floorspace and turnover, including Glasgow City Centre, the town centres and commercial centres.

6.1.2 The relationship between expenditure and turnover in any study area can be expressed simply as: *residents' expenditure potential plus inflows, minus outflows = total turnover*. The estimated distribution of turnover by floorspace within a study area must sum to the expenditure-based total for that area.

6.2 Recorded changes in comparison floorspace in the City Region

6.2.1 Table 6.1 shows the changes in comparison retail floorspace by local authority area from 2015 to 2024. Some Councils were able to provide more extensive updated floorspace information from surveys compared to others. Sources of the updates to 2024 are provided in the footnotes to Tables 6.4 to 6.11. The largest changes are the decline in comparison floorspace in Glasgow (notably in the City Centre) and in South Lanarkshire (Hamilton and East Kilbride town centres). Elsewhere, the changes have not been remarkable, but uncertainty exists in some Council areas where information has not been updated. The overall change in the City Region is -14%, based on where changes have been recorded, meaning that it is not a comprehensive estimate.

Table 6.1			
Comparison retail floorspace in the City Region: change from 2015-2024 (where recorded)			
	2015 sq m gross	2024 sq m gross	Difference %
East Dunbartonshire	57,572	58,323	1%
East Renfrewshire	23,459	21,268	-9%
Glasgow, including City Centre	842,879	669,784	-21%
<i>City Centre</i>	<i>397,257</i>	<i>300,973</i>	<i>-24%</i>
Inverclyde	86,975	80,095	-8%
North Lanarkshire	181,242	186,897	3%
Renfrewshire	193,338	205,968	7%
South Lanarkshire	165,524	111,848	-32%
West Dunbartonshire	77,039	73,736	-4%
Glasgow City Region	1,628,029	1,407,919	-14%
<small>Note 2015 data from Glasgow City Centre Retail Impact Study 2015 by RMacLean/ Ryden. 2024 data mainly from the Council surveys where they have updated figures. Includes recent 2024 floorspace survey by N Lanarkshire Council The data for S Lanarkshire has been amended since the 2015 Study and includes 2023/24 survey data for Hamilton and E Kilbride TCs</small>			

6.3 City Region comparison expenditure and turnover

6.3.1 Table 6.2 shows the comparison expenditure potential of the residents of the City Region and the total turnover in 2024. The percentage inflows and outflows derive from the Glasgow City Centre Retail Impact Study 2015 with updates, as explained in the footnote to the table. These patterns were survey based at the time, albeit with some adjustments. Such is the scale of the retail offer that expenditure leakage is very low (-3%), while significant

expenditure is also attracted in from beyond the Region (+13%). The low outflows reflect the large scale of the retail offer in the GCR and that is unlikely to have changed much, with a high proportion of retention. While the value of inflows of expenditure is estimated to have reduced slightly since 2015, the proportion probably has not because of the lower total catchment expenditure with rising online spending.

Table 6.2 Glasgow City Region comparison expenditure and turnover 2024 (in 2022 prices) <i>Excluding special forms of trading (mainly internet)</i>			
			2024 £ million
Glasgow City Region-residents' expenditure potential			4,702.7
Add: inflows	13%		614.2
Less: outflows	-3%		-141.1
Turnover			5,175.7
Note Expenditure potential is from Table 2.3 in this report. Percentage inflows and outflows from Table 2.2 in the <i>Glasgow City Centre Retail Impact Study 2015</i> (by Ryden/ R MacLean for the City Council)			

6.3.2 Table 6.3 shows the total comparison expenditure and turnover in each of the eight local authority areas in the City Region, with the sum of the totals by Council area controlled to the total for the City Region. The estimated turnover in each Council area is based on the ratios of expenditure and turnover from the 2015 Study, adjusted to accommodate changes in the distribution of population since that date and updated expenditure per capita data. The turnover data for South Lanarkshire has been updated to correct an error in the comparison floorspace data in the 2015 Study.

6.3.3 The changes in distribution of expenditure and turnover in each Council area from 2015 to 2024 are shown in detail in Appendix 3. It shows that the proportion of residents' expenditure in the City Region has increased in Glasgow relative to the other Council areas since 2015. This is largely the consequence of population growth.

Table 6.3			
Comparison turnover by Council area derived from the expenditure patterns 2024 (in 2022 prices)			
Excluding special forms of trading (mainly internet)			
	<i>rounded</i>		2024 £ million
East Dunbartonshire- residents' expenditure potential			320.6
* Turnover as a proportion of the City Region	2.6%		135.9
Net expenditure outflow			-184.7
East Renfrewshire- residents' expenditure potential			283.5
Turnover as a proportion of the City Region	0.9%		48.9
Net expenditure outflow			-234.6
Glasgow- residents' expenditure potential			1,579.1
Turnover as a proportion of the City Region	63.9%		3,305.6
Net expenditure inflow			1,726.5
Inverclyde- residents' expenditure potential			189.0
Turnover as a proportion of the City Region	3.2%		167.4
Net expenditure outflow			-21.7
North Lanarkshire- residents' expenditure potential			805.1
Turnover as a proportion of the City Region	6.6%		341.5
Net expenditure outflow			-463.6
Renfrewshire- residents' expenditure potential			467.3
Turnover as a proportion of the City Region	13.7%		708.8
Net expenditure inflow			241.5
South Lanarkshire- residents' expenditure potential			842.9
Turnover as a proportion of the City Region	5.4%		280.0
Net expenditure outflow			-562.9
West Dunbartonshire- residents' expenditure potential			215.0
Turnover as a proportion of the City Region	3.6%		187.6
Net expenditure outflow			-27.4
City Region total turnover	100.0%		5,175.7

Note

Residents' expenditure potential in each Council area in 2024 is shown in Table 2.3

* The proportions of turnover are based on the Glasgow City Centre Retail Impact Study 2015, updated to 2024, including amendments to correct the floorspace and turnover data for South Lanarkshire in the 2015 Study.

6.3.4 Table 6.3 also shows the deduced net expenditure inflows and outflows for each of the eight Council areas (shopping patterns). For example, Glasgow has a very high level of net expenditure inflow. It is also high in Renfrewshire, which we have adjusted upwards since 2015 to reflect the continuing wide trade draw to the popular Braehead Shopping Centre. In our estimation, its turnover/ floorspace ratio may have fallen a bit compared to that in the City Centre, although remaining high performing. High net outflows of expenditure are present in East Dunbartonshire, East Renfrewshire, North Lanarkshire and South Lanarkshire. Aside from Glasgow and Renfrewshire, the estimated comparison turnover levels in 2024 in the Council areas are lower than in 2015, because the much higher proportion of online spending (30%) compared to 18.9% (Appendix 2 in the 2015 Study).

6.4 Comparison floorspace and turnover in each Council area 2024

6.4.1 The distribution of occupied comparison retail floorspace and turnover in each of the eight Council areas is shown in Tables 6.4 to 6.11. The retail floorspace has been updated from the Glasgow City Centre City Centre Retail Impact Study 2015 through our consultations with each of the local authorities for the current study. This method was set out in our response to the consultancy brief and accepted by the clients. South Lanarkshire Council advise that they have no readily available data on updated retail floorspace. So, we have updated this information ourselves to 2024 for Hamilton and East Kilbride Town

Centres, which are where the main changes are likely to have taken place compared to other, smaller centres. The details are in Appendices 4 and 5. The comparison turnover associated with distribution of floorspace is controlled to the total for each Council area shown in Table 6.3.

Table 6.4				
East Dunbartonshire comparison retail floorspace and turnover 2024 (in 2022 prices)				
	Area		2024 Turnover	
	sq m gross	sq m net	Av. turnover ratio £ per sq m	Turnover £million
Strategic Centres				
Kirkintilloch TC incl comp in Tesco & Sainsbury's	8,267	4,960	3,279	16.3
Other centres and retail parks				
Strathkelvin Retail Park excl M&S	23,744	18,995	3,443	65.4
Bearsden TC	872	523	3,771	2.0
Milngavie TC incl comp in Tesco	5,336	3,217	4,098	13.2
Bishopriggs TC	1,654	954	2,951	2.8
Other Bearsden shops incl comp in ASDA	4,763	2,871	3,935	11.3
Other Milngavie shops incl Waitrose, Aldi, Home Bargains	2,120	1,434	4,754	6.8
Other Bishopriggs incl comp in ASDA, and M&S	4,232	2,558	3,115	8.0
Other Kirkintilloch shops incl Lidl, Lenzie, Twechar + N Villages	7,336	4,447	2,295	10.2
Total East Dunbartonshire	58,323	39,960		135.9
Note				
Updates to the gross floorspace in the East Dunbartonshire Retail Capacity Study 2019 from 2023 based survey data provided by the Council				

Table 6.5				
East Renfrewshire comparison retail floorspace and turnover 2024 (in 2022 prices)				
	Area		2024 Turnover	
	sq m gross	sq m net	Turnover £ per sq m	Total £million
Strategic Centres				
Newton Mearns (incl comp in ASDA & M&S)	7,852	4,711	4,025	19.0
Barrhead (incl comp space in new ASDA, Tesco)	2,698	2,654	3,019	8.0
Other centres and retail parks				
Clarkston	1,747	1,255	2,415	3.0
Giffnock (incl comp in Morrisons)	1,079	1,692	3,220	5.4
Other shops in small centres	2,690	1,614	1,409	2.3
Greenlaw Village	2,252	1,351	1,811	2.4
Crossmill, near Barrhead B&M/ Card Factory/ S Army	2,950	2,065	4,227	8.7
Total East Renfrewshire	21,268	15,342		48.9
Note				
The comparison retail floorspace data provided by Council for 2024.				

Table 6.6 Glasgow comparison retail floorspace and turnover 2024 (in 2022 prices)				
	Area		2024 Turnover	
	sq m gross	sq m net	£ per sq m	£million
Strategic Centres				
City Centre Total	300,973	180,584	11,296	2,040
Buchanan Galleries	44,933	26,960		
*Primary retail at location levels 1,2 &3	189,441	113,665		
Princes Square	2,322	1,393		
St Enoch Centre	12,494	7,496		
Other City Centre floorspace	51,783	31,070		
Pollok/Silverburn	41,819	27,182	8,472	230.3
Easterhouse- The Fort & Shandwick Sq	66,853	46,797	8,472	396.5
Parkhead- Forge Shopping Centre	17,425	11,326	6,777	76.8
Parkhead Retail Park	23,738	18,990	3,389	64.4
Shawlands	10,800	6,480	4,518	29.3
Partick/Byres Rd	20,653	12,392	4,518	56.0
Local Town Centres				
Drumchapel	4,297	2,578	2,824	7.3
Govan	3,519	2,111	2,824	6.0
Maryhill	2,179	1,307	2,824	3.7
Shettleston	2,066	1,240	2,824	3.5
Springburn	4,073	2,444	2,824	6.9
Mount Florida	1,432	859	2,824	2.4
Aggregate of other Tier 3 centres (28)	48,077	28,846	2,824	81.5
Selected retail parks (out of centre)				
Great Western Retail Park	22,987	18,390	3,389	62.3
Darnley	10,001	8,001	3,389	27.1
Auldhouse Retail Park	7,040	5,632	3,389	19.1
Glasgow Gait/ Mount Veron	8,864	7,091	3,389	24.0
Mount Vernon West	7,248	5,798	3,389	19.6
Other comparison floorspace				
Robroyston	8,312	6,650	3,389	22.5
St Rollox	12,402	9,922	5,083	50.4
Summerston	1,013	608	2,824	1.7
Other	44,013	26,408	2,824	74.6
Total Glasgow	669,784	431,636		3,305.6
Note				
Gross floorspace provided by the City Council (2023 survey). The figures for 'Other City Centre floorspace' and 'Other' at the bottom of the table are from 2015, reduced by 25% by us as an estimate to reflect the general decline to 2024				
* Locations in the City Centre referred-to as levels are as follows:				
level 1 Buchanan St				
level 2 Sauchiehall St/ Argyle St				
level 3 Gordon St/Queen St/Union St				

Table 6.7 Inverclyde comparison retail floorspace and turnover 2024 (in 2022 prices)				
	Area		2024 Turnover	
	sq m gross	sq m net	Turnover £ per sq m	Total £million
Strategic Centres				
Greenock TC incl. Waterfront Retail Park, Homebase/ Oak Mall and comparison floorspace in supermarkets (RMacL- Inv Retail Study 2014)	47,398 4,322	28,439 2,581	3,629 3,629	103.2 9.4
Other centres				
Port Glasgow TC incl part Tesco & B&Q Gourock	23,015 939	13,809 563	3,447 2,359	47.6 1.3
Local centres in Greenock/ Port Glasgow/Gourock/ Kilmacolm/ Inverkip/ and Wemyss Bay	1,441	865	2,177	1.9
Out of centre shops incl part Lidl	2,980	1,825	2,177	4.0
Total Inverclyde	80,095	48,082		167.4
Note The comparison retail floorspace is based on 2019 survey data from Council				

Table 6.8 North Lanarkshire comparison retail floorspace and turnover 2024 (in 2022 prices)				
	Area		2024 Turnover	
	sq m gross	sq m net	Turnover £ per sq m	Total £million
Strategic Centres				
Airdrie TC incl. Airdrie R Park	15,884	9,530	2,473	23.6
Coatbridge TC- total	25,749	18,767		57.6
<i>Faraday Retail Park (TC) incl Tesco comp</i>	18,015	14,506	2,854	41.4
<i>Rest of TC- including ASDA comp floorspace</i>	7,734	4,261	3,805	16.2
Cumbernauld TC	31,028	16,885	2,854	48.2
Motherwell TC	21,634	12,980	2,854	37.0
Wishaw TC	12,388	7,433	2,473	18.4
Sub total strategic centres	106,683	65,595		184.8
Other centres & retail parks				
Airdrie Retail Park	4,800	3,840		
Birkenshaw IE	28,175	22,540		
Caledonian Retail Park, Wishaw	12,078	9,602		
Mackinnon Mills, Coatbridge	14,366	10,744		
Westway Park, Cumbernauld	11,012	8,262		
Westfield Retail Park, Cumbernauld	4,037	3,230		
Sub total retail parks, excl Faraday RP & Airdrie RP	69,668	58,218	2,473	144.0
Smaller centres				
Bellshill	5,580	3,348		
Kilsyth	2,197	1,954		
Shotts	1,603	962		
Newmains	1,166	1,166		
Sub total smaller centres	10,546	7,429	1,712	12.7
Total North Lanarkshire	186,897	131,242		341.5
Note Council updates to the Glasgow City Centre Retail Impact Study 2015 plus recent 2024 floorspace survey				

Table 6.9 Renfrewshire comparison retail floorspace and turnover 2024 (in 2022 prices)				
	Area		2024 Turnover	
	sq m gross	sq m net	£ per sq m	£million
Strategic Centres				
Paisley TC	40,434	24,260	4,899	118.9
Braehead	49,572	32,222	9,308	299.9
Braehead Retail Park-completed consent 21/0027/PP	952	762	3,674	2.8
Braehead Retail Park/IKEA (not strategic)	58,128	46,502	3,674	170.9
Other centres & retail parks				
Abbotsinch Retail Park	20,522	16,418	2,694	44.2
Abbotsinch Retail Park-completed consent 16/0878/PP	1,858	1,486	2,694	4.0
Wallneuk Retail Park, Paisley-completed consent 16/0541/PP	9,741	7,793	2,694	21.0
Paton's Mill RP Johnstone -completed consent 16/0643/PP	1,200	960	2,694	2.6
Blythswood (Renfrew) Retail Park	4,349	3,479	2,450	8.5
Bridge of Weir	1,295	777	2,450	1.9
Erskine	205	123	2,450	0.3
Johnstone	4,657	2,794	2,450	6.8
Renfrew	1,718	1,031	2,450	2.5
Phoenix (Gallagher) Retail Park	11,337	9,070	2,694	24.4
Total Renfrewshire	205,968	147,677		708.8
Note				
Updates to the gross floorspace from 2015 provided by the Council (mainly completed consents since that date)				

Table 6.10 South Lanarkshire comparison retail floorspace and turnover 2024 (in 2022 prices)				
	Area		2024 Turnover	
	sq m gross	sq m net	£ per sq m	£million
Strategic Centres				
East Kilbride TC	33,299	21,644	5,162	111.7
Hamilton TC	15,713	9,428	4,646	43.8
Hamilton Palace Grounds Retail Park (in TC)	14,930	11,944	2,839	33.9
Lanark	9,466	5,680	3,097	17.6
Other centres and retail parks				
Kingsgate Retail Park	12,828	10,262	2,839	29.1
Braidfute Retail Park, Lanark	no data			
Biggar	1,970	1,182	2,581	3.1
Blantyre	1,474	884	2,581	2.3
Burnside	436	262	2,581	0.7
Cambuslang	2,085	1,251	2,581	3.2
Carluke	3,218	1,931	2,581	5.0
Larkhall	3,649	2,189	3,097	6.8
Lesmahagow	431	259	2,581	0.7
Rutherglen	7,373	4,424	3,097	13.7
Strathaven	2,462	1,477	3,097	4.6
Uddingston	2,514	1,508	2,581	3.9
Total South Lanarkshire	111,848	74,325		280.0
Note				
Comparison floorspace for Hamilton and East Kilbride town centres updated by R MacLean Assoc. to 2024, drawing on information from the Assessor surveys in 2023/24 (online) and Google/Assessor maps for some units, including Hamilton Palace Grounds Retail Park				
Otherwise the 2015 comparison floorspace data has been applied to other centres, corrected from the 2015 Glasgow Retail Impact Study.				

Table 6.11 West Dunbartonshire comparison retail floorspace and turnover 2024 (in 2022 prices)				
	Area		2024 Turnover	
	sq m gross	sq m net	Turnover £ per sq m	Total £million
Strategic Centres				
Clydebank (Clyde Shopping Centre)- includes ASDA comp Dumbarton	32,800 7,970	21,320 4,782	4,733 3,550	100.9 17.0
Other centres & retail parks				
St James Retail Park incl. ASDA comp @ 2,800 sq m gross	11,227	8,982	3,076	27.6
Clyde Retail Park	15,568	12,454	2,603	32.4
Kilbowie Retail Park	2,288	1,830	2,130	3.9
Alexandria	1,972	1,183	2,130	2.5
Balloch-no data				
Loch Lomond Shores- no floorspace data				
Lomond Galleries, Alexandria- high vacancy levels	1,911	1,529	2,130	3.3
Total West Dunbartonshire	73,736	52,080		187.6
Note Clyde Shopping Centre 2023 TC survey-Council. Dumbarton and Alexandria 2023 TC surveys- Council Retail Parks 2017 survey-Council Lomond Galleries- 2015 data				

6.5 Comparison retail planning commitments

6.5.1 A list of the current undeveloped planning consents for comparison retail floorspace in the City Region is shown in Table 6.12. The total floorspace of the consents is 59,686 sq m *gross*, compared to the existing total of 1,407,264 sq m *gross* comparison floorspace in the City Region (4%). The consents are those over 1,000 sq m *gross* floorspace apart from one. Many are mixed use consents, but only the comparison floorspace element is shown in Table 6.12. The list was compiled from our consultations with each of the eight local authorities. We have included our own nominal estimates of the turnover. In cases where the consent has already been developed, or where there is a reduction in floorspace or where the consent is undetermined, estimated turnover is not shown in Table 6.12. The number of consents is low for the size of the Region, as many older schemes have vanished or have been reduced in scale, such as at Braehead. This does not imply any weakness particular to the GCR, because it reflects retail development market conditions nationally. Overall, there is little evidence of progress towards completing development of the consents, which suggests weak market demand for more comparison retail floorspace.

6.5.2 In East Dunbartonshire, there is consent for division of the B&Q at Strathkelvin Retail Park into two units, retaining B&Q in one part. This does not represent an increase in retail floorspace. There are no undeveloped consents in East Renfrewshire. In Glasgow, Crown Retail Park is now fully developed. The largest consent relates to blocks of units at Glasgow Harbour. We understand that development of units for retailing has not commenced to date, and it is over four years since permission was granted, notwithstanding the impact of the pandemic. It is effectively Glasgow's flagship scheme containing mixed commercial and housing development near the City Centre.

Table 6.12					
Existing comparison retail planning consents and estimated turnover in 2024 (in 2022 prices)					
<i>(Includes some proposals without consent- as identified)</i>					
<i>Excludes completed and operational consents</i>		Floorspace sq m		Turnover	Turnover
		gross	net	ratio £/sq m	£million
Planning consents included in the capacity study					
East Dunbartonshire					
TP/ED/15/0310 (no start)	Strathkelvin Retail Park B&Q Mezzanine. Consent pre 2024 Division of B&Q into two units, retaining B&Q in one-consent 19/01/2024	2,787 5,168	2,230 4,134	3,500 no additional floorspace	7.8
East Renfrewshire					
18/0302/TP	Crossmill, Barrhead- retail units incl. B&M granted 25/6/20. Completed and operational - see Table 7.4				
Glasgow					
17/01926/DC	Cathcart Rd/ Caledonia Rd- part of mixed use -granted 16/03/18 (Crown Retail Park)- 13,025 sq m gross retail. Includes Aldi, B&M etc Developed- so not relevant to this table	13,025	10,420		
18/02626/FULL	Cathcart Rd/ Caledonia Rd- part of mixed use -granted 10/10/18 Part of above	1,180	944		
18/01993/MSC	Glasgow Harbour-part of mixed use-granted 14/02/2020 Units arranged in blocks	17,974	14,379	7,000	100.7
22/02505/PPP	Variation submitted (doesn't affect retail)				
16/02428/DC	1-3 Martha St etc- part of mixed use- granted 5/09/17	4,024	2,414	7,000	16.9
22/02198/MSC	Queenslie IE- part of mixed use- pending consideration	2,973	1,784		
19/00237/MSC	133 Bell Street- granted 14/03/2019	2,099	1,259	4,000	5.0
22/02278/FULL	Site by Shawlands Arcade etc-part of mixed use-pending con.	2,000	1,200		
22/00817/PPP	St Enoch Centre- phased demolition, with mixed use redevelopment including some retail (unspecified amount)- granted 01/06/2023			<i>retail space reduction</i>	
	Buchanan Galleries redevelopment pre- application discussions ongoing				
Inverclyde					
19/0285/IC	Oak Shopping Mall, Greenock- part demolition Granted 18/11/21				
20/0316/IC	Inverkip Power Station site - mixed use including retail, M Plan incl. up to 2,400 sq m retail/ commercial/ employment. Granted 18/01/22	2,400	1,920	3,000	5.8
North Lanarkshire					
18/00463/PPP	Ravenscraig- Ravenscraig Ltd- granted 18/11/2020. See Masterplan & 01/00758/OUT 22,296 sq m gross comp, 4,732 sq m gross conv. No detail prop yet.	22,296	17,837	3,000	53.5
18/01750/PPP	Westway R P- Promontoria Holdings- granted 19/06/2019 4,599 sq m gross comp and 1,858 sq m gross conv	4,599	3,679	3,000	11.0
16/01347/AMD	Buchanan B Park, Stepps- Catalyst Sixth-granted 07/10/2016 6,376 sq m gross supermarket. No progress- assume defunct for this report				
21/01434/S42	Junction 6, Chapelhall- GS Brown- granted 28/01/2022 Mixed use with 500 sq m gross ancillary comp floorspace	500	325	3,000	1.0
Renfrewshire					
24/0118/PP	Braehad Retail Park- S42 Application to extend retail floorspace Decision pending. Note- 3 major consents have expired at Braehad Retail Park- to be replaced by the above.	1,690	1,352		
23/0463/PP	Blythwood IE- change of use from retail Class 1a to retail/ storage/ distribution. Granted, but not implemented	1,773	1,418	3,000	4.3
21/1584/PP	Blythwood IE- change of use from retail Class 1a to retail/ storage/ distribution. Granted, but not implemented	1,220	976	<i>retail space reduction</i>	
21/1668/PP	Paisley Centre- floorspace reduction. Granted but not implemented (no area specified)				
19/0592/PP	Linwood (34 Napier St)- change of use to retail. Granted but not implemented	1,234	987	3,000	3.0
South Lanarkshire					
<i>no information provided by the Council</i>					
West Dunbartonshire					
no outstanding consents					
Total comparison consents (excluding those where no turnover is shown)		59,686	46,449		208.9
Note Gross floorspace from the Council. Turnover of the consents are estimates relating broadly to existing turnover ratios.					

6.5.3 A couple of smaller retail consents in Glasgow are included in Table 6.12, and a further two are still to be determined. The St Enoch Centre has consent for phased demolition with redevelopment to include some retailing, which has yet to be defined. Discussions are ongoing over redevelopment of Buchanan Galleries, with plans for reduced retailing.

6.5.4 In Inverclyde, the Oak Street Mall is scheduled for part demolition, At the former Inverkip Power Station site, there is provision for up to 2,400 sq m of retailing among the other uses. In North Lanarkshire, the main comparison retail consent is on the extensive Ravenscraig regeneration site, alongside the creation of major employment land uses, housing and transport infrastructure. The Ravenscraig Masterplan includes provision for town centre retailing and mixed uses as indicated in Tables 3.1 and 6.12. There are still no detailed retail proposals after nearly four years since the outline permission was granted. Provision for three neighbourhood centres is also included. In Renfrewshire, there are a handful of relatively minor retail consents. West Dunbartonshire Council has no outstanding undeveloped retail consents of a scale for inclusion in this study.

6.5.5 The list of sites in Table 6.12 indicates that a total of around 46,000 sq m *net* comparison floorspace has consent for development in the City Region over the next few years. Around 70% of the total estimated net floorspace is accounted for by the consents at Glasgow Harbour and at Ravenscraig. In our opinion, there is considerable uncertainty over the extent to which retail floorspace at these sites will be fully developed in total, given the retail market trends described earlier in this report. More retail development proposals will emerge in the City Region over the coming years. They are likely to be related to area regeneration with mixed uses in and around the City Centre and also in the main town centres, with 'de-malling' proposals for example. The next section explores the potential spare comparison expenditure capacity to support future development of comparison retail floorspace up to 2037.

7 Comparison expenditure capacity forecasts to 2037- City Region overall

7.1 Introduction

7.1.1 This section contains an assessment of the spare comparison expenditure capacity to support additional retail floorspace in the City Region up to 2037. The conventional approach is to apply projected UK expenditure growth rates by Experian (or by other agencies) to the baseline expenditure and turnover in 2024 to estimate the levels in 2029 and 2037. The spare capacity is mostly represented by the forecast growth in turnover to the end date. Existing retail planning commitments require to be subtracted to indicate the net spare expenditure capacity to support further floorspace under this method.

7.1.2 A limitation of the method in general is that it commonly exaggerates forecast spare capacity against the market, where achieved retail development is often far lower. Also, the high proportion of online shopping compared to past decades means that the relationship between expenditure and retail shop floorspace is much less well defined. Therefore, our forecasts take account of past retail market trends in the City Region from 2015-24 to assist interpretation.

7.2 Consideration of past trends

7.2.1 Earlier in the report we highlighted where comparison retail floorspace has reduced considerably in some Council areas, such as in the City Centre and in South Lanarkshire but has not changed much in others since 2015. Many large-scale retail consents and proposals identified in the 2015 study have not materialised, such as the originally proposed expansion of retail floorspace at Buchanan Galleries and proposed extensions adding more retail floorspace to Silverburn and Braehead. The level of proposed retail floorspace at Glasgow Harbour under the latest consent is much less than in the original proposal in 2015. There has been no progress towards developing the major retail consent at Ravenscraig.

7.2.2 In section 7, the overall comparison retail turnover levels in six of the eight local authorities are *lower* in 2024 compared to 2015. The main reason is the rise in proportion of internet retail spending where SFT was around 19% in 2015 compared to the estimated 30% proportion in 2024. In our opinion, the upward trend seems likely to continue because it is driven by customer attraction to online shopping i.e. it is market-led. Looking at the position in Scotland, there has been no development of major new centres since the St James Quarter in Edinburgh, completed in 2021. Nor have any major new retail parks been created, aside from a few small ones, which are commonly a mix of budget comparison goods stores, such as B&M and Home Bargains) and food discounters (Aldi and Lidl). Town centre and shopping mall redevelopment proposals now often incorporate diminution of comparison retail floorspace and replacement with other uses.

7.3 Forecast comparison expenditure and turnover to 2037

7.3.1 Drawing on the retail market analysis in this report and on the comments in the previous paragraphs, we estimate that the proportions of SFT (mainly internet) spending per capita could rise substantially by 2037. Future retail floorspace requirements are very sensitive to variations in the proportion of internet expenditure. It is unlikely that this sensitivity will diminish because of the large scale of retail expenditure involved. Retailers

seem unlikely to switch back to major instore sales floorspace under existing trends. Therefore, an illustrative range is presented in this report. At the **low** end of the range of forecast spare capacity, 50% of comparison retail spending is assumed to be mainly internet based by 2037. Forecasts in section 2 (Table 2.3) are just shown at the low end because a full presentation of the range is shown here. The **high** end assumes 40% internet-based spending by 2037. The range in terms of expenditure per capita is shown in Table 7.1. We consider that forecasts incorporating proportions of internet spending lower than 40% would lead to increasingly unrealistic forecasts of high levels of new retail floorspace against our long-term market view. While all centres in will be affected by the trends in internet spending, it is likely that the City Centre will prove more resilient to the changes because of its sheer scale and range of offer.

Table 7.1			
Glasgow City Region residents' comparison expenditure per capita per annum (in 2022 prices)			
Excluding special forms of trading (mainly internet)			
2022	2024	2029	2037
£	£	£	£
3,788	3,619	4,202	5,263
Low end of forecast range to 2029 and 2037		2,533	2,605
High end of forecast range to 2029 and 2037		2,533	2,731
Sources:			
The figure for 2022 is from the Experian <i>Area Comparison Report</i> for Glasgow City Region, commissioned for this study.			
Figures for 2024, 2029 and 2037 derive from the UK growth rate in comparison expenditure per capita applied to the 2022 figure for Glasgow City Region			
UK expenditure per capita figures are shown in <i>Experian Retail Planner Briefing Note 21</i> (Appendix 4a), February 2024			
*Deductions require to be made to allow for special forms of trading (SFT- internet expenditure, mail order etc), which do not relate to in-store retail floorspace.			
The proportions deducted derive from <i>Experian Retail Planner Briefing Note 21</i> - Appendix 3-(adjusted SFT)			
	2024	2029	2037
	-24.3%	-27.4%	-29.4%
Market demand for comparison retail floorspace indicates that the proportion of internet expenditure in the GCR is higher than the Experian proportions.			
Therefore the following proportions are applied:			
Low forecast	-30%	-38%	-50%
High forecast	-30%	-35%	-40%

7.3.2 Table 7.2 shows the projected comparison expenditure and turnover growth in the City Region up to 2029 and 2037, assuming the same proportions of inflows and outflows as in 2024.

Table 7.2				
Glasgow City Region comparison expenditure and turnover to 2037 (in 2022 prices)				
Excluding special forms of trading (mainly internet)				
		2024	2029	2037
		£ million	£ million	£ million
Low end of forecast range to 2029 and 2037				
Glasgow City Region-residents' expenditure potential		4,702.7	4,871.9	4,959.7
Add: inflows	13%	614.2	636.3	647.7
Less: outflows	-3%	-141.1	-146.2	-148.8
Turnover		5,175.7	5,362.0	5,458.6
High end of forecast range to 2029 and 2037				
Glasgow City Region-residents' expenditure potential		4,702.7	5,105.7	5,946.5
Add: inflows	13%	614.2	666.8	776.6
Less: outflows	-3%	-141.1	-153.2	-178.4
Turnover		5,175.7	5,619.3	6,544.7
Note				
Expenditure potential is from Tables 2.1 and Table 7.1				
Percentage inflows and outflows are from Table 6.2				

7.4 Spare comparison expenditure capacity 2024 to 2037

7.4.1 The planning context for defining spare capacity is the level of new retail development that can be accommodated without threatening the vitality and viability of established town centres. Spare retail capacity can exist in the following forms:

- Growth in retained expenditure (turnover)
- Potential to claw back expenditure leakage
- Potential to attract new trade into the area
- 'Acceptable' levels of impact

7.4.2 The principal source of spare capacity in the City Region is the expenditure based forecast growth in turnover. There is little evidence to reliably determine future changes to expenditure inflows and outflows. Given the large scale of the area, there is no particular need to introduce consideration of the matter from the perspective of the individual local authorities, in our opinion. 'Acceptable' levels of impact refer to situations where new retail developments can be supported by trade diversion from centres without threatening their viability. It is not usually included in spare capacity studies, and it is unlikely to be relevant to a strategic study.

7.4.3 The forecast spare comparison expenditure capacity in the City Region is shown in Table 7.3 and Table 7.4 within the defined range, before deduction of the estimated turnover of the retail consents to show net spare capacity. Consideration of the consents follows. The reason for the separation is that it is by no means clear that the existing consents will be developed-out and what further changes in the schemes may appear in the future.

7.4.4 Table 7.3 shows the forecast spare capacity at the **low end** of the range at nearly £283 million in the City Region by 2037. It is a moderate amount compared to the current total comparison turnover in the City Region in Table 6.2. The equivalent net retail floorspace would be around 34,000 sq m by 2037, assuming a turnover/ floorspace ratio of £8,000 per sq m net in 2024. Explanation for this figure is provided in the footnote to the table. It is a compromise to allow for opportunities in the City Centre (turnover ratio around £11,300 per sq m), major centres and other locations including Glasgow Harbour and Ravenscraig. Note that much more weight should be given to the spare expenditure figures compared to the equivalent retail floorspace which are at best a rough guide.

Table 7.3 Glasgow City Region: spare comparison expenditure capacity up to 2037- low forecast (in 2022 prices) (before deduction of turnover of planning commitments)			
	2024-29 £million	2029-37 £million	2024-37 £million
Low end of forecast range (assuming 50% of comparison spending online by 2037)			
Growth in retained expenditure (turnover)- Table 8.2	186.2	96.6	282.9
% growth	4%	2%	
Estimate	186.3	96.7	282.9
Equivalent comparison floorspace (average)			
* Turnover/ floorspace ratio	£ per sq m 8,288 sq m net	£ per sq m 8,437 sq m net	sq m net
Equivalent floorspace	22,500	11,500	34,000
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely.			
* The applied turnover ratio (£8,000 per sq m net in 2024) allows for a range between the City Centre (high); the largest shopping centres (fairly high); and other locations. The ratio has been increased to relate to forecast turnover in the City Region 2024-29 and 2029-37 in Table 7.2			

7.4.5 Table 7.4 shows the forecast spare capacity at the **high end** of the range at nearly £1,244 million in the City Region by 2037. It is a large amount compared to the low forecast of spare capacity. The equivalent net retail floorspace would be nearly 130,000 sq m net by 2037.

Table 7.4 Glasgow City Region: spare comparison expenditure capacity up to 2037- high forecast (in 2022 prices) (before deduction of turnover of planning commitments)			
	2024-29 £million	2029-37 £million	2024-37 £million
High end of forecast range (assuming 40% of comparison spending online by 2037)			
Growth in retained expenditure (turnover)	403.0	840.8	1,243.8
% growth	9%	16%	
Estimate	403.1	841.0	1,243.8
Equivalent comparison floorspace (average)			
* Turnover/ floorspace ratio	£ per sq m 8,686	£ per sq m 10,116	
	sq m net	sq m net	sq m net
Equivalent floorspace	46,400	83,100	129,500
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely.			
* The applied turnover ratio (£8,000 per sq m net in 2024) allows for a range between the City Centre (high); the largest shopping centres (fairly high); and other locations. The ratio has been increased to relate to forecast turnover in the City Region 2024-29 and 2029-37.			

7.4.6 We emphasise that we are providing scenarios whereby the share of internet spend is the key variable and that the market evidence (multiples closing, lack of new requirements or development) is consistent with the low floorspace growth/ high internet growth scenario. In our view, the **low forecast** appears to more closely match market trends at present. We recognise the inherent uncertainty of this over the medium to long term; hence planning should allow for some appropriate opportunities such as town centre retail and mixed-use regeneration sites; and it should be monitored again in say 5 years' time.

7.5 Spare capacity and planning commitments

7.5.1 In section 6, the estimated total turnover of selected retail planning commitments is some £209 million (Table 6.12), compared to the forecast spare capacity at the low end of the range at some £283 million in Table 7.3. In theory, the net difference of some £74 million would potentially be available to service other new comparison retail floorspace in the future. However, we consider that the market is more likely to support comparison retail floorspace in the City Centre emerging from reconfigured and redeveloped properties. It would take the lion's share before major projects outside the City Centre. However, we consider that the market is more likely to support comparison retail floorspace in the City Centre emerging from reconfigured and redeveloped properties before major projects outside the City Centre. Such schemes will mostly be mixed use developments with comparison retail floorspace forming part of any project.

7.5.2 The potentially higher returns on investment and probably lower risk will be the drivers behind this assumption favouring the City Centre. While the City Centre has a massive customer pull, the locations at Glasgow Harbour and Ravenscraig are untested. It is impossible to put a figure on it, but the share of the total spare expenditure capacity of £283 million beyond the commitments could be much larger than the net £74 million.

7.6 Conclusions

7.6.1 Our view is that the forecast spare comparison retail expenditure capacity offers the opportunity to potentially service mixed-use redevelopment areas over the next 13 years, especially in the City Centre. While some existing vacant floorspace may attract re-occupation, much of it won't. The forecast spare comparison expenditure capacity should be treated as indicative because the growth in internet expenditure has made the link with retail floorspace requirements much less clear than in the past.

8 Recommendations

8.1 Introduction

8.1.1 The purpose of this research is to assess the supply and demand for retail land and property in the Glasgow City Region (GCR) over the next ten years to assist the updating and production of local development plans (LDPs) in the Council areas. The previous sections in this study provide the research to develop a strategic overview on retailing linking LDPs in all eight of the constituent local authorities and inform Evidence Reports underpinning preparation of the LDPs.

8.2 What has changed since 2015

8.2.1 Pre NPF4, many of the problems facing retailing in town centres in the Glasgow City Region today were identified in the Strategic Development Plan (SDP) 2017, as were future actions to mitigate them. This document no longer has any status in the development plan hierarchy. Therefore, progression of a new regional spatial strategy on retailing is best achieved by building on the old one. Administratively, this will be challenging because it will rely on voluntary collaboration between eight local authorities.

8.2.2 The fundamental change to the region's retail geography since Clydeplan 2017 is the withdrawal or failure of multiple retailers, with vacancies and market stress migrating up the hierarchy from smaller towns (many of which have largely now recovered) to the network of strategic centres, particularly covered shopping malls with their focus on branded multiples and high costs of adaptation- see sections 4 and 5. Retail parks are prominent in the regional hierarchy and are benefitting from their modern stock and accessible locations.

8.2.3 Changes identified in the current report since 2015 include a 14% decline in comparison retail floorspace in the City Region overall, but with considerable variations within the total- see Table 6.1. The 24% decline in City Centre retail floorspace is high, as is the 32% decline in South Lanarkshire relating to East Kilbride and Hamilton town centres. Decline in other town centres in the GCR has been more modest, based on available information. Shopping malls in the GCR have experienced severe financial pressure with evidence of 'de-malling' and planned reconfiguration to include other uses. To date, not much has happened on the ground in terms of redevelopment relating to retailing. It is not possible to predict with certainty which centres will be de-malled and to what extent. It is very early in a cycle which could take a decade or more.

8.2.4 In contrast, the best retail parks and their modern units in the GCR have held up well during the period, mainly because of relatively easy access by car and associated free parking compared with congested town centres. However, there has been no development of new retail parks of any scale aside from those accommodating discounters. Nor is there much expressed interest in developing more out of centre retail parks, probably on account of policy restrictions (NPF4) and the effects of online retailing reducing the need for retail floorspace. Retail parks are also becoming click-and-collect hubs, and as bulky goods abate then a much wider mix of comparison retail and leisure is moving in- see sections 4 and 5. The Region has more retail parks and more of those with town centre / High Street uses than its UK peers.

8.2.5 The growth of online retail spending has had a major negative effect on the market demand for comparison retail floorspace in town centres and shopping malls. In

2015, the proportion was estimated at around 19%, compared to around 30% in 2024 in this report. It is forecast to possibly rise by up to 40%-50% by 2037. Retailers that have fully adapted to multi-channel shopping are the foundation of the existing successful parts of town centres.

8.2.6 Contraction of comparison retailing in many town centres has been accompanied by decline in the quality of environment of some of these centres with increased numbers of redundant retail units and eroding streetscapes. None of this is supportive to attracting new retail development and improvements to the retail offer. Much work has gone into preparing masterplans in town centres (including the City Centre) in the City Region in recent years to promote regeneration. Indeed, town centre planning is increasingly masterplan-led compared to the past. Some of the masterplans are impressive, but mostly as yet unrealised in terms of built new/ reconfigured retail development, where the nature and extent of the retail content is not well defined.

8.3 Retail development trends

8.3.1 Development trends are the opposite of what expenditure growth would suggest:

- Comparison spend is growing and strategic for the Region, *but* due to market concentration and online shopping, floorspace is reducing and no major developments are proposed.
- Convenience spend is not growing and is not strategic, *but* due to strong competitive pressures there is regular investment and development, particularly from discount grocers.

8.4 Future Regional Spatial Strategy - Recommendations

8.4.1 At present, there is no formal Guidance from the Scottish Government outlining the role, function and content of any future RSS. However, the sections below set out a range of Recommendations for any potential future regional working in the GCR area. Any future joint working based on these Recommendations will require agreement by the constituent Authorities. In the meantime, in terms of chronology, the respective LDPs are being produced prior to the publication of any future RSS.

8.4.2 A new potential strategy on retailing for the Glasgow City Region could aim to fulfil the following functions to support the LDPs, where possible, which will be advancing before the RSS:

- Provide a unifying framework for the next round of local development plans in the City Region to define the role of the City Centre and the town centres in the provision of comparison shopping, within the provisions of NPF4 on retailing and town centres,
- Update the network of centres in the City Region, including the list of strategic centres identified in the Clydeplan or emerging RSS relating to retailing,
- Provide general policy support on retailing for local development plans, including consideration of town centre masterplans. It would take into consideration health checks and measures to support the six qualities of successful places in Annex D to NPF4 to be included in LDP evidence reports, where retailing is relevant.
- Provide support for the development management of major retail applications of regional significance.

8.4.3 Sub sections 8.5-8.9 contain a set of RSS recommendations on what could be done to develop the future strategy. As yet, the forthcoming RSS is yet to emerge, so the recommendations below are essentially matters for discussion between the constituent local authorities in the GCR.

8.5 Recommendation 1

8.5.1 A focus on comparison retail floorspace would be consistent with a regional strategic perspective on the role and function of shopping in town centres. Convenience shopping is more of a local issue, especially with the increasing market share of discount foodstores, which are small/ medium sized units. The study indicates that there is no strategic requirement for additional comparison floorspace within Glasgow City Region, beyond that already with consent. However, the additional comparison retail floorspace may form part of regeneration and restructuring strategies set out in local development plans for specific centres. There is no strategic requirement for additional convenience floorspace within Glasgow City Region.

8.5.2 Preparation of this report has exposed the importance of having up to date information on retail floorspace collected by each of the eight local authorities. Acknowledging that resources are limited to undertake retail surveys, priority could be given to the largest town centres, and principal shopping streets in the City Centre. The frequency of surveys could be once every three years for monitoring purposes for example. It would be decided by individual local authorities, preferably collectively at a regional scale to encourage consistency. Creation of a shared database on retail floorspace would be appropriate. It would also be appropriate to update information on shopping patterns, perhaps through household shopping surveys or other means such as customers' use of cards.

8.6 Recommendation 2

8.6.1 Review the existing network of strategic centres in Schedule 2 of the SDP 2017 to help inform the emerging RSS by reflecting current and forecast retail trends. It is arguable whether some of the smaller centres have a strategic role within the scale of the City Region or future RSS. The size of the comparison retail floorspace in each strategic centre appears in Tables 7.3-7.10. Any review would aim to clarify why a town centre is 'strategic' and consider other retail matters in Section 2 such as 'Challenges' and 'Future Actions'.

8.7 Recommendation 3

8.7.1 Provide information and data to assist with consideration of where changes in the future proportion of retailing in some town centres would add most benefit in terms of their vitality and viability. This would apply to strategic town centres with masterplans and where major change is occurring. Development of retail floorspace in the future is most likely to occur as part of large mixed use planned redevelopment in town centres. The support could be broad, on a centre-by- centre basis, indicating where increases or decreases in retail floorspace would be desirable, for example.

8.8 Recommendation 4

8.8.1 Maintain a cross boundary working group of planning officers for sharing retail information and experience. They would be regularly informed about retail activity and development in the other Council areas and instances where their area may be affected. The working group would contribute towards monitoring retail development trends and pressures from a strategic standpoint. For example, a topic could be the scale of 'town centre' uses now in retail park locations, some of which are parts of town centres on the edge, while

others are not. The authorities already have mechanisms for joint working and the existing Clydeplan Strategic Centres Topic Group which has planners with considerable experience on joint working in retail policy.

8.9 Recommendation 5

8.9.1 Development management- where planning applications with a major retail element could potentially threaten established centres in more than one local authority area, assessment of impact across adjoining local authority planning areas offers advantages. There may be traffic and transport impacts on more than one local authority area to consider as well as the estimates of trade diversion, for example. Our advice is that the local authority in which the application is situated is in the best position to take the lead on which other authorities are consulted. Cross boundaries consultation procedures should not become too rigid.

8.10 Recommendations for Local Development Plans (LDPs)

8.10.1 The following sub sections outline a number of Recommendations for the eight GCR Authorities to consider as they develop their respective LDPS.

8.11 Recommendation 1

8.11.1 The study indicates that there is no strategic requirement for additional comparison floorspace within Glasgow City Region, beyond that already with consent. However, the additional comparison retail floorspace may form part of regeneration and restructuring strategies set out in local development plans for specific centres.

8.11.2 There is also no strategic requirement for additional convenience floorspace within Glasgow City Region. However, opportunities for additional convenience floorspace may be identified in local development plans to address local shortfalls and to support local living.

8.12 Recommendation 2

8.12.1 Preparation of this report has exposed the importance of having up to date information on retail floorspace collected by each of the eight local authorities. Acknowledging that resources are limited to undertake retail surveys, priority could be given to the largest town centres, and principal shopping streets in the City Centre. The frequency of surveys could be once every three years for monitoring purposes for example.

8.13 Recommendation 3

8.13.1 Many town centre boundaries are wider than their retail function, because they contain various other land uses. A review of the extent of the currently defined town centre boundaries is recommended, with a view to defining smaller 'town centre retail' areas. These would reflect the primary retail pitches for the purposes of development management. The object would be to intensify customer attraction through concentration of the retail offer. Secondary town centre retail areas could also be defined. If undertaken as part of a regional strategy informed by wider market trends, there is more chance of achieving consistency of treatment among the town centres. The review of town centre boundaries is a matter for LDP preparation initially, until further detail on the scope of the RSS emerges.

8.14 Recommendation 4

8.14.1 Sub sections 8.2 and 8.3 outline the changes and trends that have occurred in the GCR since 2015. Currently, these elements are either being actively managed by the

constituent Authorities and other interested parties, or they are issues that are currently being considered by the Authorities and the relevant parties involved. Any future LDP will have to reflect the agreed spatial response to these changes, trends and any other related matters, where applicable.

Appendix 1

Convenience expenditure per capita in the Council areas 2024-37
(Experian)

Glasgow City Region residents' convenience expenditure per capita per annum (in 2022 prices)				
	2022 £	2024 £	2029 £	2037 £
East Dunbartonshire	2,966	2,861	2,856	2,878
<i>*Excluding special forms of trading (SFT)</i>		2,712	2,676	2,668
East Renfrewshire	2915	2,812	2,807	2,829
<i>*Excluding special forms of trading (SFT)</i>		2,666	2,630	2,622
Glasgow	2642	2,548	2,544	2,564
<i>*Excluding special forms of trading (SFT)</i>		2,416	2,384	2,377
Inverclyde	2824	2,724	2,719	2,740
<i>*Excluding special forms of trading (SFT)</i>		2,582	2,548	2,540
North Lanarkshire	2651	2,557	2,553	2,573
<i>*Excluding special forms of trading (SFT)</i>		2,424	2,392	2,385
Renfrewshire	2853	2,752	2,747	2,769
<i>*Excluding special forms of trading (SFT)</i>		2,609	2,574	2,566
South Lanarkshire	2861	2,760	2,755	2,776
<i>*Excluding special forms of trading (SFT)</i>		2,616	2,581	2,574
West Dunbartonshire	2817	2,717	2,712	2,734
<i>*Excluding special forms of trading (SFT)</i>		2,576	2,542	2,534
Glasgow City Region	2,754	2,656	2,652	2,672
<i>*Excluding special forms of trading (SFT)</i>		2,518	2,485	2,477
Sources:				
The figures for 2022 are from the Experian <i>Area Comparison Reports</i> for each Council area, commissioned for this study.				
Figures for 2024, 2029 and 2037 derive from the UK growth rate in convenience expenditure per capita applied to the 2022 figure for each Council area.				
UK expenditure per capita figures are shown in <i>Experian Retail Planner Briefing Note 21</i> (Appendix 4a), February 2024				
*Deductions require to be made to allow for special forms of trading (SFT- internet expenditure, mail order etc), which do not relate to in-store retail floorspace.				
The proportions deducted derive from <i>Experian Retail Planner Briefing Note 21</i> - Appendix 3-(adjusted SFT)				
		2024	2029	2037
		-5.2%	-6.3%	-7.3%

Appendix 2

Comparison expenditure per capita in the Council areas 2024-37

Table
Glasgow City Region residents' comparison expenditure per capita per annum (in 2022 prices)

	2022 £	2024 £	2029 £	2037 £
East Dunbartonshire	4,327	4,134	4,799	6,012
<i>*Excluding special forms of trading (SFT)</i>		2,894	2,976	3,006
East Renfrewshire	4,288	4,097	4,756	5,958
<i>*Excluding special forms of trading (SFT)</i>		2,868	2,949	2,979
Glasgow	3,699	3,534	4,103	5,140
<i>*Excluding special forms of trading (SFT)</i>		2,474	2,544	2,570
Inverclyde	3,750	3,583	4,159	5,211
<i>*Excluding special forms of trading (SFT)</i>		2,508	2,579	2,605
North Lanarkshire	3,529	3,372	3,914	4,903
<i>*Excluding special forms of trading (SFT)</i>		2,360	2,427	2,452
Renfrewshire	3,867	3,695	4,289	5,373
<i>*Excluding special forms of trading (SFT)</i>		2,586	2,659	2,687
South Lanarkshire	3,901	3,727	4,327	5,420
<i>*Excluding special forms of trading (SFT)</i>		2,609	2,683	2,710
West Dunbartonshire	3,654	3,491	4,053	5,077
<i>*Excluding special forms of trading (SFT)</i>		2,444	2,513	2,539
Glasgow City Region	3,788	3,619	4,202	5,263
<i>*Excluding special forms of trading (SFT)</i>		2,533	2,605	2,632

Sources:

The figure for 2022 is from the Experian *Area Comparison Report* for East Dunbartonshire Council area, commissioned for this study.

Figures for 2024, 2029 and 2037 derive from the UK growth rate in comparison expenditure per capita applied to the 2022 figures for each Council area
 UK expenditure per capita figures are shown in *Experian Retail Planner Briefing Note 21* (Appendix 4a), February 2024

*Deductions require to be made to allow for special forms of trading (SFT- internet expenditure, mail order etc), which do not relate to in-store retail floorspace.
 The proportions deducted derive from *Experian Retail Planner Briefing Note 21*- Appendix 3-(adjusted SFT)

2024	2029	2037
-24.3%	-27.4%	-29.4%

Market demand for comparison retail floorspace indicates that the proportion of internet expenditure in the GCR is much higher than the Experian proportions.
 Therefore the following proportions are applied:

-30%	-38%	-50%
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Appendix 3

Estimated comparison turnover in each Council area 2024 - method

Table
Estimated comparison turnover by Council area 2024- method
Excluding special forms of trading (mainly internet)

	a 2015 Expenditure (excl SFT) £million	b 2015 Expenditure Proportions %	c 2024 Expenditure (excl SFT) £million	d 2024 Expenditure Proportions %	e 2024 Turnover £million	f 2024 Turnover Proportions %
East Dunbartonshire	345.2	7.1%	320.6	6.8%	135.9	2.6%
East Renfrewshire	313.4	6.4%	283.5	6.0%	48.9	0.9%
Glasgow	1,484.7	30.5%	1,579.1	33.6%	3,305.6	63.9%
Inverclyde	211.0	4.3%	189.0	4.0%	167.4	3.2%
North Lanarkshire	909.5	18.7%	805.1	17.1%	341.5	6.6%
Renfrewshire	480.6	9.9%	467.3	9.9%	708.8	13.7%
South Lanarkshire	904.1	18.6%	842.9	17.9%	280.0	5.4%
West Dunbartonshire	223.8	4.6%	215.0	4.6%	187.6	3.6%
Glasgow City Region	4,872.3	100%	4,702.7	100%	5,175.7	100.0%

Notes

(a) and (b) from Appendix 2 Table D in the Glasgow City Centre Retail Impact Study 2015 (by Ryden/ R MacLean for the City Council)

(c) and (d) from Table 2.3 in this report

(e) and (f) Updates to the Glasgow City Centre Retail Impact Study 2015, including corrections the S Lanarkshire comparison retail floorspace data and other adjustments

Appendix 4

Hamilton Town Centre comparison retail floorspace 2024

Hamilton Town Centre (excluding Palace Grounds Retail Park): comparison retail shops 2024

List drawn from Assessor survey data in 2023/24. It is a desk study update of an earlier survey by SLC of shops within the LDP town centre boundary
The shops are within postcode sectors ML3 6 and, ML3 7. The floorspace of each individual unit is not shown here to respect data reproduction confidentiality. Assembled by R MacLean Associates Ltd for the current Glasgow City Region Study

Survey dates 2023/24

The postcodes include: ML3 7 (Regent Way), ML3 6 (New Cross)

The list is based on an earlier survey by SLC within Hamilton TC boundary

Val page	Shop Unit	Shop name	Part of Centre	Floorspace sq m
1	11	H Samuel	Regent Way	
1	17	Adaptable Fasions	Regent Way	
1	19	James Warren jeweller	Regent Way	
1	20	Kast Retail-clothing (status unsure)	Regent Way	
2	23A	Blue Inc	Regent Way	
2	23B	The Works	Regent Way	
2	24	Claire's Accessories	Regent Way	
2	27	Clinton Cards	Regent Way	
3	29	Wilkinson Hardware (in administration)	Regent Way	
3	32	T Mobile	Regent Way	
3	33	Dollond and Aitchson- opticians	Regent Way	
3	38B	Fone Star	Regent Way	
3	38	3UK	Regent Way	
4	39	New Look	Regent Way	
4	40	Superdrug	Regent Way	
4	40	Little Angels	Regent Way	
4	41	Vodaphone	Regent Way	
4	42	Wilkie's - fashion	Regent Way	
4	44	Boots	Regent Way	
4	46	WH Smith	Regent Way	
5	48	Sportswift (status unsure)	Regent Way	
1	1B	Argos	New Cross Centre	
1	2	Stylewear	New Cross Centre	
2	8	Brighthouse	New Cross Centre	
2	9	Kilbride Hospice (charity shop)	New Cross Centre	
2	11	Poundland	New Cross Centre	
2	12B	Furniture House	New Cross Centre	
2	13	Savers Health & Beauty	New Cross Centre	
1	1	Mobile Point	Lamb St	
1	1	Semi Chem	Quarry St	
	14	Phone shop	Quarry St	
	16	Beauty products	Quarry St	
2	25	Primark	Quarry St	
2	29	Primark	Quarry St	
2	26	Blind Logic	Quarry St	
2	30	Shelter Shops	Quarry St	
2	39	Childrens' clothes	Quarry St	
3	41	Scotcrest Uniforms Ltd	Quarry St	
3	44	Blinds	Quarry St	
3	47	Gerard Fashions	Quarry St	
3	48	Nelson jewellers	Quarry St	
4	64	Vaping shop	Quarry St	
5	67-69	Wilkie's- fashion accessories	Quarry St	
5	70-72	Verve clothing	Quarry St	
5	77A	Hornstein opticians	Quarry St	
6	81	Electronic Games	Quarry St	
7	93	Specsavers	Quarry St	
7	96	Opticians	Quarry St	
8	106	Robertson clothing	Quarry St	
8	112	Timpson	Quarry St	
8	124	Baby shop	Quarry St	
9	126	PC Plus	Quarry St	
9	138A	St Andrews Hospice- charity shop	Quarry St	
10	145	Crawford- jeweller	Quarry St	
10	149	Repair shop	Quarry St	
4 (ML3 6)	172	Dial a Frame	Quarry St	
1 (ML3 7)	3	Ollybear- baby clothes	Quarry Place	
1	7	Boutique	Quarry Place	
1	8	Lloyds Pharmacy	Quarry Place	
1	12	British Heart Foundation	Quarry Place	
1	14	Marie Curie	Quarry Place	
2	18	Perfumes	Quarry Place	
1 (ML3 6)	7	Pharmacy (possibly closed)	Brandon St	
1	9	Charity shop	Brandon St	
4 (ML3 6)	35	Apollo Blinds	Cadzow St	
5	64	Bridal alterations	Cadzow St	
6	75	Music Centre	Cadzow St	
		<i>no comparison shops</i>	<i>Campbell St</i>	
		<i>no comparison shops</i>	<i>Castle St</i>	
	27	Beauty products	Chapel St	
1 (ML3 7)	4	Studio de Fleur	Duke St	
1	11	Regent Gifts		
1	13	Gamestation		
1	15	Shoe Zone		
2	19	C&J Clark Ltd		
1	3	Dance shoes	Gateside St	
2	11	Kilt & Suit Co.	Gateside St	
		<i>Keith St- no comparison shops</i>		
		<i>Townhead St- no comparison shops</i>		
		Total		15,713

Appendix 5

East Kilbride Town Centre Comparison Retail Floorspace 2024

East Kilbride Town Centre comparison retail shops 2024

List drawn from Assessor data 2023/24 and letting floorplan for the Centre. The floorspace for each unit is not shown here to respect data reproduction confidentiality

Desk study by R MacLean Associates for the Glasgow City Region Study

The postcodes include: G74 1LL (Centre West) G74 1LW (Plaza), G74 1LT (Olympia/Southgate), G74 1PG (Olympia), G74 14G, G74 1LJ (Princes Sq), G74 1LB (Princes Mall)

Val page	Shop Unit	Shop name	Part of Centre	Floorspace sq m
3	LR20A	Beaverbrooks	Centre West	
2	LR20B/20C	H&M	Centre West	
2	LR18A	Trespass	Centre West	
1	LS U2	Next	Centre West	
1	LR15B	Superdrug	Centre West	
1	LR1 5A	hmv	Centre West	
	33B	Bodycare	Centre West	
	38A/33A	Waterstones	Centre West	
3	LR1/LR2	Blu-Inc- mens clothing	Centre West	
3	LR3	Clair's Accessories	Centre West	
3	LR4B	Yankee closed	Centre West	
3	LR5	Office (Shoe Shop)	Centre West	
2	LR6	Quizz	Centre West	
2	LR9/10	River Island	Centre West	
1	LR12	H Samuel	Centre West	
1	LR14 (LR15 on map)	The Body Shop	Centre West	
4	UR2B-UR3	Deichmman Shoes	Centre West	
2	28	Primark	The Plaza	
2	27B	The Works	The Plaza	
2	27A	Optical Express	The Plaza	
2	26	EE	The Plaza	
2	18/19	Vision Express	The Plaza	
1	17	Pandora - jewellery	The Plaza	
3	33	Boots	The Plaza	
3	38	Card Factory	The Plaza	
3	40	Clintons - cards	The Plaza	
3	41	Carphone Warehouse	The Plaza	
3	42	The Fragrance Shop	The Plaza	
3	43A	O2	The Plaza	
3	43B	Warren James jewellers	The Plaza	
4	46 (45 on map)	Yours- clothing	The Plaza	
4	47	JD Sports	The Plaza	
4	48	3Store	The Plaza	
4	49/50	WH Smith	The Plaza	
1	1 (2 on map)	Sports Direct	The Plaza	
1	2 (1 on map)	New Look	The Plaza	
1	4	M&S	closed	
1	9	Retro	The Plaza	
1	10	Tiger	The Plaza	
1	11	Matalan	The Plaza	
6	64B	The Enternainer- toys	Southgate Mall	
6	64C	Smiggle- bags/ containers	Southgate Mall	
1	23/25	Specsavers	Southgate Mall	
2	33	Cards and Gifts	Southgate Mall	
2	31	Vodaphone	Southgate Mall	
1	1	Timpson	Southgate Mall	
2	28 or unit A	Game	Olympia	
6	22-24 or unit 6/7	Poundland	Princes Square	
6	26	Peacocks	Princes Square	
6	29	Celtic FC Ltd	Princes Square	
6	28	Boots	Princes Square	
7	33	Moss Pharmacy	Princes Square	
7	34	Menzo (fabrics)	Princes Square	
		Baby World (closed)	Princes Square	
		Toy Town (seems closed)	Princes Square	
2	13-19	Home Bargains	Princes Mall	
2	18	Prime Vapour	Princes Mall	
2	20	British Heart Foundation	Princes Mall	
2	22	Savers Health & Beauty	Princes Mall	
3	27-29	Poundland (assumed at Princes sq only now)	Princes Mall	
3	24	CEX		
3	26	Card Factory		
			Total	33,299

Appendix 6

Glossary of terms

Comparison goods (non-food) include:

- *Books*
- *Clothing and footwear*
- *Furniture, floorcoverings and household textiles*
- *Audio visual equipment and other durable goods (domestic appliances and phones)*
- *Hardware and DIY supplies, tools*
- *Chemists' goods*
- *Jewellery, watches and clocks*
- *Bicycles and*
- *Recreational and other miscellaneous goods*

Bulky goods are part of the comparison goods category. Experian define these as comprising *furniture, floorcoverings, furnishings, domestic appliances and DIY/ hardware, audio visual equipment, remaining 10% of non- durable household goods and bicycles.*

Convenience goods include:

- *Food and non-alcoholic drinks*
- *Alcoholic drinks*
- *Tobacco*
- *Newspapers and magazines; and*
- *90% of non-durable household goods*

Special Forms of Trading (SFT)- mainly includes internet based sales, but also includes sales from vending machines for example and other sales not directly associated with shop floorspace. It is standard practice to remove SFT from projections of retail expenditure for planning purposes, so that the expenditure forecasts mostly relate to shop floorspace.

Retail expenditure per capita- refers to data on convenience and comparison expenditure per capita published by analysts such as Experian or Precisely for example. The data can be purchased by clients for any study area. UK based data is also provided.

Turnover/ floorspace ratios- refers to the estimated turnover per square metre of shops. Principal sources of data include market intelligence specialists such as Mintel (UK Retail Rankings), Verdict/ Global and others. The data covers many of the main large retailers and refers to their *average company turnover levels* for a particular year. A collective turnover ratio for a town centre, for example, can be estimated from expenditure patterns and from simple comparison with similar centres elsewhere for any study area.

Forecast spare retail capacity- the planning context for defining spare capacity is the level of new retail development that can be accommodated without threatening the vitality and viability of established town centres. Spare retail capacity can exist in a study area in the following forms:

- Growth in retained expenditure (turnover)
- Potential to claw back expenditure leakage

- Potential to attract new trade into the area
- 'Acceptable' levels of impact

'Acceptable' levels of impact refer to situations where new retail developments can be supported by trade diversion from centres without threatening their viability. It is not usually included in spare capacity studies.

Main retail catchment area- refers to the area from where most of the trade is drawn to a store or town centre. For example, Glasgow City Centre, where the main catchment is the City Region.

Trade diversion- refers to the estimated pattern of trade loss to established centres and stores to a major new retail proposal.

Retail impact assessment- an appraisal of the effects of the above loss to the vitality and viability of established centres which have protection under 'town centres first'. It also includes the impact on other stores and centres to demonstrate the context.