2 SHOPPING

2.1 Introduction

2.1.1 Retailing is an increasingly important service industry both nationally and within the Falkirk Council area. Employment in the retail sector continues to rise: in the Council area it now provides some 6780 jobs (13% of total employment), an increase of 60% since 1984. Shopping is, of course, an essential social activity for most households and access to good shopping facilities is therefore a key quality of life issue. However, it is also increasingly seen as a leisure activity, with important links to tourism. Attractive shopping facilities, particularly where combined with other leisure and cultural activities in the context of a vibrant town or city centre, can attract significant visitor spending to an area.

2.1.2 Retailing is bound up inextricably with the future of town centres, a fact which has increasingly been reflected in government policy. The importance of town centres has long been recognised. They provide an accessible focus for social and economic interaction, an expression of the identity of an area and an indicator of local economic prosperity. Although town centres are multi-functional, retailing continues to underpin their vitality and viability and pressures to decentralise shopping to off-centre locations have continued to pose a threat in recent years.

2.1.3 Shopping is a major trip generator, accounting for some 22% of all journeys undertaken in Scotland and some 13% of total distance travelled (Source: Falkirk Council Household Survey). The location of retail facilities therefore has a significant influence on transport use and important implications for the promotion of sustainable development.

2.2 National Planning Policy

2.2.1 National planning policy on retailing is contained in NPPG 8 which was issued in revised form in October 1998. NPPG 17 on Transport and Planning, which links closely with the Government's retail policy is also of relevance.

NPPG 8 " RETAILING "

2.2.2 The Government's objectives set out in NPPG 8 are:

* *to sustain and enhance the vitality, viability and design quality of town centres, as the most appropriate location for retailing and other related activities;*
* *to maintain an efficient, competitive and innovative retail sector offering consumer choice, consistent with the overall commitment to town centres; and*
* *to ensure that ways of meeting these objectives are compatible with sustainable development and in particular, that new developments are located where there are good public transport services, and better access for those walking and cycling, leading to less dependence on access by car.*

2.2.3 The central principle of the Guideline is the adoption of a sequential approach to the location of new retail development, as well as other attractions and facilities usually found in town centres. This means that first preference should be for town centre sites, where sites or buildings suitable for conversion are available, followed by edge-of-centre sites, and only then by out-of-centre sites in locations that are, or can be made easily accessible by a choice of means of transport.

2.2.4 Following on from this basic policy approach, guidelines are given on town centres, on assessment criteria for new developments and on a range of specific retail and leisure formats. To implement the guideline, structure plans should:

- *set out the policy for supporting and enhancing town centres, including an assessment of how far the existing town centres might be able to meet the demands for new shopping floorspace and other uses, while contributing to consumer choice and access to new formats;*
- *indicate whether, as part of the sequential approach, there is scope for retail developments outwith town centres; if so indicate their scale and general location, ensuring co-ordination with expected housing, employment, or other planned developments, including transport infrastructure; and*
- *reflect the criteria set out in the guideline against which retail and commercial leisure development proposals outwith town centres should be assessed.*

2.3 Current Situation & Trends

Retailing Trends

2.3.1 Retailing is widely recognised to be an extremely dynamic and innovative industry. It has evolved rapidly over the past twenty years in response to various social and economic changes which have influenced consumer behaviour and expectations. These include:

- *increased personal disposable income giving rise to retail expenditure growth averaging some 2.7% nationally over the past twenty years, but also an increasing disparity between affluent and poor consumers;*
- *demographic changes such as the increased number of households, ageing population and more single person households;*
- *dispersal of population out from urban centres;*
- *increased car ownership and personal mobility (the percentage of car-owning households in the Council area rose from 45% to 60% from 1971 to 1991);*
- *widening of consumer horizons, resulting in heightened consumer expectations and a demand for greater choice and variety;*
- *emergence of shopping as a leisure activity;*
- *cyclical fluctuations in national and local economies and the investment policies of major financial institutions; and*
- *changes in national planning policy.*

2.3.2 Retail industry responses to these trends have been many and varied. The most striking general trend has been the dramatic increase in new retail floorspace. Most of this has been in the form of superstores and national multiples, at the expense of smaller or independent operators, resulting in a slight decline in the number of retail units in Scotland. Amongst smaller shops, there has been a tendency towards specialisation and exploitation of new market niches; those of a more general character have not fared well. Retail investment has tended to be concentrated on large centres at the expense of smaller centres. Growth has also been accompanied by dispersal, particularly in the food and household shopping sectors. Meanwhile, retailers' efforts to maximise their market share in an increasingly competitive climate have resulted in considerable innovation in store formats.

2.3.3 In food retailing, superstores have continued to expand in number and scale, diversifying into comparison goods and in-store services. In the mid 1990s, this was paralleled by rapid growth in smaller discount supermarkets (e.g. Kwiksave, Aldi, Lidl). More recently, the major operators have developed smaller town centre formats (e.g. Tesco Metro). At the neighbourhood level, there has been a marked growth in small convenience shops attached to petrol filling stations and other national chains such as All Days. (NPPG 8 defines supermarkets as being "single level, self-service stores selling mainly food, with a trading floorspace of between about 500 and 2,500 sq. m., often with their own car parks". It defines superstores as being "single level, self-service stores selling mainly food, or food and non-food goods, usually with at least 2,500 sq. m. trading floorspace with a dedicated car park").

2.3.4 New shopping malls have been developed in many town centres across Scotland, improving the range, quality and choice of shops. A limited number of out-of-town shopping malls have been developed, such as The Gyle, but these have been limited in scale compared to the regional shopping centres developed in England.

2.3.5 The non-food retail warehouse sector has increased dramatically during the 1980s and 1990s, and remains buoyant. Most growth has been in the form of off-centre retail parks. Although traditionally associated with the sale of bulky household goods, there is now strong demand for retail warehouse space from other sectors such as fashion, leisure, toys, children's goods and computers. This presents a challenge to current planning policy which has generally sought to restrict the range of goods sold from retail parks. A two tier market has evolved which distinguishes between locations with restricted and open Class 1 consents.

2.3.6 There has been substantial pressure for the development of factory outlet centres, generally in out-of-town locations. This format, originally imported from the US, is now established in England and is gaining a foothold in Scotland. There is ongoing debate over the impact of such developments on town centres, operators claiming that local impact is limited by their restricted nature and wide catchment. The growth potential for this format may be limited, both by market and planning policy constraints.

2.3.7 Home shopping occupies a small but growing sector of the market. Well established forms such as mail order, person to person selling, book/music clubs and home delivery of convenience shopping are now being joined by Internet selling and phone purchasing. The 1998 Household Survey indicates that some 4% of the clothing/footwear purchases made by Falkirk Council residents were by catalogue/mail order. Further growth in home shopping is likely, particularly for certain types of goods, but will be limited by the continued social/leisure function of shopping trips.

2.3.8 There has been an increasing emphasis on environmental quality as part of the shopping experience. Pedestrianisation and environmental improvements, as carried out in Falkirk Town Centre between 1989 and 1993, have made a major contribution to the vitality and viability of traditional town centres.

2.3.9 Town centre management has come to the fore as a means of maintaining and improving the performance and competitive position of town centres. Falkirk's Town Centre Management Company was one of the earliest to be set up and has established a track record of effective marketing and co-ordination.

2.3.10 The above features have characterised retailing over the past two decades. In looking to the future, some of these trends will undoubtedly continue. In terms of expenditure available to support future development, modest levels of growth can be anticipated (2.7% based on Data Consultancy long term trends 1976-1996). Growth in expenditure on convenience shopping (1.8%) will be more limited than on comparison (3.6%), but is generally more reliable. Comparison expenditure is more volatile, being more sensitive to the general economic climate and having increasingly to compete with other forms of leisure expenditure.

2.3.11 With growth in food expenditure being limited and planning policy on new off-centre stores becoming more restrictive, investment may shift to refurbishment, expansion or redevelopment of existing stores. In the non-food sector, growth is likely to focus on retail warehousing.

2.3.12 Assuming that current government policies on retailing continue, town centres will retain their importance. However, competitive pressures will increase, both from neighbouring traditional centres and from out-of-town and edge-of-town retail parks. Continuing improvement, investment and innovation will be necessary to maintain market share.

Retail Provision and Future Commitments in Falkirk Council Area

2.3.13 Retail provision in the Falkirk Council area is concentrated within a hierarchy of centres, as listed in Figure 2.1.

Figure 2.1 - Hierarchy of Shopping Centres in the Falkirk Council Area

Sub Regional Centre	Falkirk Town Centre
District Centre	Grangemouth Town Centre Bo'ness Town Centre Denny Town Centre Stenhousemuir Town Centre
Local Centres based on large food store	Polmont Shopping Centre Newcarron Village Centre
Other Local Centres	Larbert Brightons Bonnybridge Camelon Laurieston Charlotte Dundas (Grangemouth) Bainsford Grahamston Slamannan
Retail Park	Central Retail Park, Falkirk

2.3.14 The hierarchy is dominated by Falkirk Town Centre, which functions as the sub-regional centre within the Council area. Not only is it the main comparison centre within the Council area, but it also retains a very significant food shopping role.

2.3.15 Adjacent to Falkirk Town Centre, Central Retail Park has developed as the principal centre for household goods in the Council area. Although allocated in the existing Structure Plan as an off-centre location, it has strong links with the Town Centre and is better described as an edge-of-centre site.

2.3.16 The District Centres comprise the traditional town centres of Grangemouth, Bo'ness, Denny and Stenhousemuir. Although these centres have seen a decline in comparison floorspace and have had to adapt to a more limited role focused mainly on convenience shopping and services, they retain a significant level of floorspace and a reasonable variety of shops and services.

2.3.17 Local Centres comprise the centres of the smaller towns and the suburban centres of Falkirk and Grangemouth. Two of these - Newcarron and Polmont - have supermarkets of sufficient scale to satisfy the main food shopping needs of their respective catchments, whilst the remainder are more likely to serve 'top-up' convenience shopping needs.

Retail Floorspace

2.3.18 Floorspace figures and numbers of units for the various centres within the Council area are shown in Figures 2.2 and 2.3, broken down into convenience, comparison, vacant and non-retail. These figures are based on a floorspace survey carried out by the former Central Regional Council in 1993, updated comprehensively in 1996 and selectively in 1998. Non-retail uses were included in the survey in recognition of the important role they play in town centres. Floorspace figures from 1985 are shown in Figure 2.4, although care should be taken in comparing the two due to differences in the way the two sets of data were assembled. The 1985 figures do not include vacant or non-retail floorspace.

Figure 2.2 - Retail Floorspace in Falkirk Council Area 1996 (sq.m.) (selectively updated to 1998)

	Conv.	Comp.	Vacant	Non-Retail	Total
Falkirk Town Centre	16,550	60,240	8,130	20,600	105,520
Central Retail Park	4,650	14,150	-	-	18,790
Newcarron Village	3,780	170	-	320	4,280
Camelon	1,710	1,530	150	2,650	6,040
Rest of Falkirk	4,640	10,860	2,720	6,090	24,310
Grangemouth Town Centre	4,420	5,010	540	4,640	14,610
Rest of Grangemouth	2,710	760	420	2,510	6,410
Denny Town Centre	1,810	1,240	60	2,050	5,150
Rest of Denny	4,020	90	300	400	4,800
Stenhousemuir Town Centre	1,910	1,870	270	1,420	5,470
Rest of Stenhousemuir	820	-	80	110	1,010
Bo'ness Town Centre	4,000	2,610	2,160	2,420	11,190
Rest of Bo'ness	2,030	250	570	720	3,570
Polmont	2,580	170	110	810	3,670
Larbert	830	670	-	1,630	3,130
Laurieston/Westquarter	570	370	150	630	1,710
Rest of Braes	1,390	570	60	940	2,970
Bonnybridge	1,380	2,160	180	1,160	4,870
Banknock/D'head/Haggs	1,020	100	-	230	1,350
Carron/Carronshore	360	100	290	470	1,230
Remainder	2,130	80	350	790	3,350
Total	**63,300**	**103,000**	**16,540**	**50,580**	**233,420**

Conv: convenience Comp: comparison. All figures rounded to the nearest ten.
Source: Falkirk Council, Floorspace Survey 1996/1998

Figure 2.3 - No. of Units in Falkirk Council Area 1996 (selectively updated to 1998)

	Conv.	Comp.	Vacant	Non-Retail	Total
Falkirk Town Centre	37	247	64	171	519
Central Retail Park	1	10	-	-	11
Newcarron Village	3	3	-	3	9
Camelon	15	11	3	25	54
Rest of Falkirk	49	43	35	94	222
Grangemouth Town Centre	16	41	7	36	100
Rest of Grangemouth	24	9	3	41	77
Denny Town Centre	11	18	2	25	56
Rest of Denny	18	1	5	10	34
Stenhousemuir Town Centre	10	20	3	22	55
Rest of Stenhousemuir	11	-	1	2	14
Bo’ness Town Centre	18	26	14	35	93
Rest of Bo’ness	16	5	10	19	50
Polmont	5	3	2	13	23
Larbert	10	16	-	33	59
Laurieston/Westquarter	10	5	4	12	31
Rest of Braes	15	10	1	20	46
Bonnybridge	13	14	3	21	51
Banknock/D’head/Haggs	7	1	-	7	15
Carron/Carronshore	5	2	3	7	17
Remainder	24	5	23	6	58
Total	**318**	**490**	**166**	**620**	**1,594**

Source: Falkirk Council, Floorspace Survey, 1996/1998

Figure 2.4 - Retail Floorspace in Falkirk Council Area 1985 (sq. m.)

	Convenience	Comparison
Falkirk Town Centre	17,191	50,487
Grangemouth Town Centre	5,922	4,592
Bo’ness Town Centre	1,930	2,913
Denny Town Centre	2,113	1,381
Stenhousemuir Town Centre	1,601	1,705
Elsewhere in District	44,422	23,440
Total	**73,179**	**84,518**

Source: Central Region Shopping Study

2.3.19 Over the period since 1985, Falkirk Town Centre has experienced increases in comparison floorspace due the construction of the Howgate Centre (completed 1990) and the Callendar Square Centre (completed 1993). The Howgate was a new development of some 15500 sq. m., whilst Callendar Square was a 20000 sq. m. redevelopment of the 1960s Callendar Riggs shopping centre. These centres have been complemented by Central Retail Park (completed 1995), on the northern edge of the Town Centre, with some 15000 sq. m. of household goods floorspace. All these developments have helped to re-establish and consolidate Falkirk's role as a comparison shopping centre of sub-regional status, after a period of decline in late 1970s and 1980s. Meanwhile, the floorspace figures demonstrate that the role of the District and Local Centres for comparison shopping is becoming less and less significant, in accordance with national trends.

2.3.20 In terms of convenience shopping, the Council has seen considerable development over the period since 1985. Within Falkirk, new food superstores have been built at Central Retail Park and at Newcarron Village, bringing the number of superstores in the Council area to four (all in Falkirk). Provision in Falkirk has been further augmented by smaller discount stores at Arnot Street and Newcarron Village. In the District and Local Centres, development has been more uneven, and the previous Structure Plan's aspiration of achieving modern foodstores in these centres only partially realised. New supermarkets have been developed in Denny, Bo'ness and Polmont, but Stenhousemuir and Grangemouth remain deficient in modern foodstore facilities.

Future Retail Commitments

2.3.21 At the time of writing, there are extant planning permissions for a 5100 sq. m. food superstore at Brockville Park, Falkirk and 8360 sq. m. of retail warehousing as an extension to Central Retail Park, which is currently under construction. Additionally, provision has been made within the Grangemouth Docks Simplified Planning Zone for a foodstore of 2500 sq. m.

2.3.22 The above proposals must obviously be taken into account in assessing future retailing capacity and needs. The Brockville site has failed to attract an operator to date. This may be indicative of its location and access constraints. Whilst it occupies an edge-of-centre site, the situation is somewhat of a backland one and significant off-site traffic management works are required. Its continued effectiveness requires to be assessed. However, it is now the subject of a revised proposal for a 8175 sq.m. foodstore to which the Council has given approval in principle, subject to the conclusion of an appropriate Section 75 Agreement. Likewise, the Grangemouth Docks proposal is a long-standing edge-of-centre foodstore site requiring substantial road infrastructure in the form of a new Town Centre by-pass road. The proposed extension to Central Retail Park will go a long way towards satisfying demand for additional retail warehouse floorspace.

Overview

2.3.23 At the end of a very active decade of retail development, retail provision within the Council area remains remarkably centralised. Under the influence of planning polices which have sought to direct investment to existing centres, the availability of town centre or edge-of-centre sites (notably Central Retail Park) has obviated the need for any significant off-centre development to date. Whether this will continue to be the case in the future is, of course, a key issue for the Structure Plan.

Shopping Patterns in the Falkirk Council Area

2.3.24 In 1998, the Council carried out an extensive Household Survey to investigate shopping patterns in the Council area. The last such survey took place in 1985. The 1998 Survey provides useful information on the shopping behaviour of residents in the Council area, in particular where people shop for different types of goods, how frequently they shop, why they shop in particular locations, mode of transport for shopping trips, and how much is spent.

Food Shopping

2.3.25 The majority of households (75%) undertake a main food shopping trip with top-up shopping trips in between. 21% shop more regularly ('hand shopping'), buying what they need each time, this mode being more prevalent amongst pensioners, households in rented accommodation, single working households and couple households where neither member works. Clearly, mobility and income factors constrain these groups' ability to do a main shop. The vast majority of shopping trips appear to be done from home, with only 19% doing food shopping generally as part of a trip to or from work, or during a lunchbreak.

2.3.26 In terms of frequency, 80% of households doing a main food shop do it weekly or more frequently. 10% do it between once a fortnight and once a week and 10% less frequently. The majority of households who only do hand shopping (60%) tend to shop every day or every other day.

2.3.27 The location most often used for main food shopping is shown in Figure 2.5. This demonstrates the popularity of the Falkirk superstores, which is where 60% of households do their main food shopping most often. The figures also confirm that the area is still comparatively self-contained for food shopping, with just 9% of households shopping outwith the Council boundaries. These are concentrated in the peripheral areas such as Bonnybridge/Banknock, Denny and Bo'ness. Analysis by Council area shows that the District Centres of Grangemouth, Bo'ness and Denny all retain at least a half of main shopping trips. By contrast, Larbert/Stenhousemuir and Bonnybridge/Banknock have extensive leakage, reflecting the relatively poor food shopping facilities available locally.

Figure 2.5 - Location most often used for main food shopping by Falkirk Council households

Store / Home Address	Falkirk	G'mouth	Polmont & Braes	Larbert/ S'muir	B'bridge/ Banknock	Bo'ness	Denny/ Dunipace	All Households
Tesco,Central Retail Park	32%	17%	24%	29%	13%	6%	11%	21%
Tesco,Callendar Road	15%	9%	25%	4%	9%	4%	6%	12%
ASDA,Newmarket Street	31%	10%	20%	23%	18%	2%	5%	18%
Co-op,Newcarron	12%	2%	4%	27%	3%	1%	7%	9%
Other Falkirk Stores	5%	3%	5%	4%	4%	1%	1%	4%
Grangemouth Stores	-	51%	2%	-	-	1%	-	8%
Somerfield,Polmont	-	3%	16%	-	-	1%	-	4%
Bo'ness Stores	-	2%	-	-	-	68%	-	7%
Denny Stores	1%	-	-	1%	19%	-	50%	6%
Stenhousemuir Stores	-	-	-	7%	-	-	-	1%
Other Falkirk Council Stores	-	-	-	-	6%	-	2%	1%
Stores Outwith Council Area	1%	1%	5%	4%	28%	14%	19%	9%
Total	**100**	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Note: Figures may not add up due to rounding.
Source: Falkirk Council Household Survey 1998

2.3.28 The most important reasons given for choosing the most often-used store were:

* *handy/convenient/easy to get to (29%);*
* *prices (22%);*
* *local or nearby (15%);*
* *variety or selection of goods (15%); and*
* *easy parking (14%).*

Proximity to public transport was important for only 4% of households overall, but 12% of pensioner households. Prices were important to over 40% of single parent households and almost 40% of non-working households. Parking was relatively more important for higher social classes and owner occupiers.

2.3.29 27% of main food shopping trips were combined with another activity, of which the most common were shopping for comparison goods, visiting a bank, building society or post office, going to a restaurant or cafe, or simply meeting friends or relatives. The continuing importance of combined trips is of significance in terms of town centre vitality and minimising the overall number of trips.

2.3.30 Overall satisfaction with the main shopping venue was generally high. The following percentages were either very satisfied or quite satisfied with various aspects of the venue:

* *value for money (97%)*
* *store environment (97%)*
* *range of goods (95%)*
* *ease of parking (78%)*
* *public transport links (34%)*

This reflects the qualitative improvements which have occurred in food shopping within the last decade.

2.3.31 In terms of mode of transport for main food shopping, 77% travel by private car, 13% by bus, 5% by taxi and 11% by foot. There was a lower incidence of private car use amongst lower income and single person households, falling to as low as 39% amongst non-working single person households.

Clothing And Footwear

2.3.32 The frequency of clothing and footwear shopping trips was quite variable, 19% purchasing more frequently than once a month, 26% purchasing between once a month and once every four months, 23% less often than every four months and 6% saying they never shopped for these items.

2.3.33 The most frequently visited centre is Falkirk Town Centre, followed by Stirling, Glasgow and Edinburgh. Other town centres in the Falkirk area are seldom used for clothes and footwear shopping, reflecting the limited role which the District Centres have for comparison shopping.

2.3.34 Figure 2.6 shows the location and average amount spent on the last shopping trip for clothing/footwear amongst households interviewed. Essentially, this is a random sample of shopping trips made by Falkirk Council residents and gives an indication of expenditure flows for this type of comparison goods. It can be seen that whilst 60% of trips were to Falkirk Town Centre, the average expenditure in the trip was less for Falkirk than its main competitors. Clearly, although Falkirk has seen substantial improvements over recent years, this has been paralleled by growth of competing centres (notably Stirling, The Gyle and Livingston) and the enduring attractiveness of Edinburgh and Glasgow, with the result that leakage is still appreciable. The mode of transport for the last clothing/footwear purchase shows that 67% travelled by private car, 22% by bus, 4% by train and 8% on foot.

Figure 2.6 - Location and Average Expenditure on Last Shopping Trip for Clothing/Footwear

Location	% of Trips	Average Expenditure (£)
Falkirk Town Centre	60	70
Other Centres within Council area	7	44
Stirling Town Centre	12	97
Glasgow City Centre	6	38
Edinburgh City Centre	3	108
The Gyle Centre, Edinburgh	2	46
Other Centres outwith Council area	6	76
Catalogue/Mail Order	4	69

Source: Falkirk Council Household Survey 1998

Furniture And Electrical Goods

2.3.35 Figure 2.7 shows the location and the average amount spent on the last shopping trip for furniture and electrical goods. This shows that most trips (69%) are made within the Council area, although again the average expenditure on trips outwith the Council area tends to be higher. Falkirk Town Centre still plays a major role in shopping for these types of goods, in spite of the opening of Central Retail Park. The mode of transport for the last furniture/electrical goods purchase shows that 69% travelled by private car, 14% by bus, 1% by train and 6% on foot.

Figure 2.7 - Location and Average Expenditure on Last Shopping Trip for Furniture/Electrical Goods

Location	% of Trips	Average Expenditure (£)
Falkirk Town Centre	41	362
Central Retail Park	18	421
Other Stores within Council area	10	675
Stirling/Springkerse	7	554
Glasgow/Edinburgh Stores	5	756
Other Stores outwith Council area	8	853
Catalogue/Mail Order	5	264
Don't know/Not stated	5	-

Source: Falkirk Council Household Survey 1998

Assessment of Shopping Centres

2.3.36 An understanding of the status, health and capacity for growth/change of the main town centres within the Council area is essential as a basis for determining future retail policy. For Falkirk Town Centre, information is available on a variety of the commonly used indicators of vitality and viability. For the District Centres, information is more sparse.

Falkirk Town Centre

2.3.37 Falkirk Town Centre has consolidated its position as a sub-regional centre over the past decade through substantial investment in new floorspace (see paragraphs 2.3.1 to 2.3.12), traffic management and environmental improvements, complemented by the success of one of the earliest Town Centre Management initiatives in the country. Its strengths include its large catchment population (250,000 within a 20 minute drive), its accessibility and excellent transport links, its good structure and the improved environment of the core retail area and its good mix of national multiples and smaller specialist shops. Its weaknesses include continuing gaps in the retail mix relative to its competitors (especially the lack of a major department store), some residual image problems, a relatively poor environment in some of the secondary areas, limited leisure facilities to complement the retail provision, some peak-time traffic management/parking problems, and accessibility to the two major cities (which means it is as easy to get out of Falkirk to shop as it is to get into).

2.3.38 In terms of indicators of vitality and viability, the Town Centre has shown both improving Zone A rental levels (Figure 2.8) and yields. Its encouraging commercial performance is reflected in its high ranking (24th out of 200) within the Investment Property Databank's 1998 Town Centre League Table. This is based on an index which combines trends in both rental values and yields. However, this general picture masks variations in performance - the success of the Howgate Centre can be contrasted with the slow letting of Callendar Square. Fortunately, the situation at Callendar Square is seeing an upturn with major lettings to BHS and T.K. Maxx.

In terms of retailer representation, Falkirk achieved a ranking of 120 (with a national multiple count of 47) in Hillier Parker's 1995 Survey of Shopping Centres. Vacancy levels have been adversely affected by the substantial number of unlet premises in Callendar Square, although it is notable that vacancy rates in the High Street have remained fairly stable in spite of the opening of the two shopping centres.

Figure 2.8 - Zone A Rental Value Growth 1987-1997 (£/sq.ft)

	Oct. 1987	Oct. 1989	Oct. 1991	Oct. 1993	Oct. 1995	May 1997	% Growth 1987 - 1997
Falkirk	33	50	45	45	73	73	121
Stirling	45	52	58	71	71	85	89
Perth	40	42	55	55	58	58	45
Livingston	27	27	42	46	45	50	85
Cumbernauld	21	30	37.5	38	50	48	129
Edinburgh	105	150	155	155	160	180	71
Glasgow	100	140	125	125	125	155	41

Source: Ryden, Scottish Industrial & Commercial Property Review

2.3.39 Following on from the development of the Howgate Centre, Callendar Square and Central Retail Park, there remain several opportunities for physical growth of the Town Centre, although not all are immediately available for redevelopment. Within the Town Centre, a possible future redevelopment opportunity exists at the eastern end of the High Street, encompassing Tesco's Callendar Road store, and the adjacent bus station, which is in need of upgrading. There are two main edge-of-centre sites - Brockville Park, which will be vacated on relocation of the football club and the Bison works. Each of these sites is somewhat backland in character, with some access difficulties, although the latter is now being developed as an extension to Central Retail Park, accommodating further demand for retail warehouse space, together with major leisure uses.

2.3.40 In overall terms, the Town Centre is currently performing well. However, growth and improvement in competing centres will put continuing pressure on its ability to maintain market share. In terms of its ability to respond to this challenge and take advantage of future growth in local expenditure, some opportunities for expansion or redevelopment exist, but the effectiveness and timing of these opportunities remains uncertain.

Central Retail Park

2.3.41 The opening of Central Retail Park in 1995 met a long-standing need for a retail warehouse park in the Falkirk area. The park is fully let and trades successfully. Whilst pedestrian links into Falkirk Town Centre could be improved, it is likely that there is considerable interaction and joint trips between the two. The Bison concrete works to the east of the retail park offer an opportunity for major expansion. As noted in paragraphs 2.3.22, development of this site is underway incorporating both retail warehousing and leisure uses.

Grangemouth

2.3.42 In terms of scale, Grangemouth is the second largest town centre in the Council area, but is nonetheless dwarfed by Falkirk. It is largely a 1960s precinct, which was refurbished in 1991. In spite of the limited scale of its two foodstores, it remains popular with Grangemouth residents for convenience shopping, some 64% of its residents doing main food and grocery shopping there on a regular basis. Its comparison shopping role is limited, only 13% of Grangemouth respondents in the Household Survey having made their last clothing/footwear purchase in the Town Centre. Its proximity to Falkirk is obviously a severely limiting factor.

2.3.43 The main opportunity for physical growth exists to the north, into the redundant docks area covered by the current Simplified Planning Zone (SPZ). Provision has been made within the SPZ for a large foodstore site, in conjunction with the construction of a new Town Centre Relief Road and the pedestrianisation of Bo'ness Road.

Bo'ness

2.3.44 Bo'ness is a traditional Town Centre with a distinctive historic character, which suffers somewhat from its increasing remoteness from the residential areas south of the town. The past decade has seen investment in two new foodstores, one of which has subsequently closed, but otherwise the centre has lacked investment and is commercially stagnant. There has been little in the way of improvements to the shopping environment. Nonetheless, 79% of the local population regularly use the modern Tesco at the eastern end of the Town Centre. Only 3% of Bo'ness respondents to the Household Survey made their most recent clothing/footwear purchase in the Town Centre, indicating the lack of even the most basic quality of comparison shopping.

2.3.45 The main opportunity for physical expansion of the Town Centre is to the east, encompassing the redundant Kwiksave store and the intervening vacant land. However, in its present state, demand for floorspace is low. Some prospects exist for a more specialised, tourist-oriented role, linked to the development of the Scottish Railway Museum.

Stenhousemuir

2.3.46 Stenhousemuir is a small precinct-style centre providing solely convenience shopping and local services. Its main weaknesses are the lack of a modern foodstore and a dated shopping environment. Only 18% of Stenhousemuir households and 11% of Larbert households regularly use it for main food shopping and its prime use at present would appear to be for top-up shopping. Stenhousemuir residents look to the relatively close Newcarron Village Centre and Tesco (Central Retail Park) for their main food shopping. Its catchment is nonetheless a large and growing one, and the development of a modern food shopping facility, together with environmental enhancement works, are clear aspirations set out in the current Local Plan.

2.3.47 Unfortunately, Stenhousemuir is physically constrained as a centre and the assembly of even a small site for a foodstore has presented difficulties, casting a question mark against its continuing status as a District Centre.

Denny

2.3.48 Denny Town Centre is split between the precinct-style development of Church Walk and the traditional properties of Stirling Street. It has two small supermarkets, supplemented by the more recently developed Kwiksave/Iceland store on Glasgow Road some half a kilometre to the south of the Town Centre proper. As many as 80% of Denny/Dunipace residents use these facilities regularly for main food shopping and for 50% it is the place they use most often. Only 7% of Denny/Dunipace respondents in the Household Survey made their last purchase of clothing/footwear in the Town Centre.

2.3.49 The most significant opportunity for growth is to the north-east of the Town centre adjacent to Carronbank House. This may have scope for a more substantial foodstore than what can currently be provided within the Town.

2.4 Retail Capacity

2.4.1 In order to plan effectively for the future shopping needs of the Council area, it is important to assess the capacity of the retail system to accept new development over the Structure Plan period. This involves estimating current expenditure and turnover within the area, and projecting these forward to an appropriate date. The nature of retailing and the lack of reliable data, mean that this process is fraught with uncertainties. Nonetheless, retail capacity studies have been undertaken for both convenience and comparison sectors, the details of which are contained in separate Technical Reports.

Convenience Shopping Capacity

2.4.2 The starting point for the Convenience Shopping Capacity Study was to estimate available expenditure in the Council area and project this to 2020 (Figure 2.9). Population figures were derived from the Council's own population projections for the Structure Plan. For comparative purposes, expenditure per head estimates were derived using three sources: firstly, Data Consultancy national averages; secondly, the national averages adjusted to reflect local variations established in the 1985 CRC Shopping Study; and thirdly, the Falkirk Council Household Survey 1998. The latter of these was chosen as the best estimate for the purposes of the capacity study. Expenditure growth rates were drawn from Data Consultancy sources. The figures produced a modest increase in convenience expenditure of £14m over the period to 2020, equivalent to the turnover of a small foodstore.

Figure 2.9 - Convenience Expenditure Projections: Falkirk Council Area

		National	Average	CRC	Adjusted	FC	Survey
Year	Pop'n.	Expend. per Head	Total Available Expend.	Expend. per Head	Total Available Expend.	Expend. per Head	Total Available
1997	143210	£1,026	£147m	£989	£142m	£1,054	£151m
2001	143689	£1,039	£149m	£1,001	£144m	£1,067	£153m
2006	144325	£1,056	£152m	£1,017	£147m	£1,085	£157m
2011	144390	£1,072	£155m	£1,033	£150m	£1,102	£160m
2016	145468	£1,089	£158m	£1,049	£153m	£1,119	£163m
2020	145734	£1,103	£161m	£1,062	£155m	£1,133	£165m

N.B. All figures on a 1990 price base
Source: Falkirk Council, Convenience Shopping Capacity Study, 1999

2.4.3 Figure 2.9 gives the amount of money spent by Falkirk Council residents on convenience shopping; it does not take account of leakage out of and into the Council area. Based on the Household Survey, it was estimated that some 7.2% of convenience expenditure leaked out of the area. Information on leakage into the area is not available from the Household Survey, but was estimated at 12% of total convenience spending in the Council area, based on the 1985 Shopping Study.

2.4.4 The second stage of the capacity study was to estimate turnover. Gross floorspace estimates from recent surveys were converted into net figures using Assessor's data, and then converted into turnover by applying turnover/floorspace ratios drawn from Data Consultancy sources and a similar study carried out by CRC in 1995. This gave a total turnover of £212m in 1997 at 1990 prices.

2.4.5 As a check, the turnover figures for various stores and town centres as derived using the above methodology were compared with the equivalent expenditure figures derived from the Household Survey. Most of the results compared fairly well, taking into account the fact that top-up shopping was not accounted for in the Household Survey.

2.4.6 Comparing the expenditure and turnover sides of the analysis shows that, in 1997, there was a £61m excess of turnover over expenditure. Using the assumptions contained in paragraph 2.3.14, leakage would only account for some £14m of this. Whilst the result is somewhat anomalous, and the gap difficult to explain, it is reasonable to conclude that there is no excess convenience capacity in the retail system at present, and that any additional floorspace would be at the expense of existing stores. As noted previously, the scale of expenditure growth available to support growth over the Structure Plan period is also limited. These factors have obvious implications for Structure Plan policies on the desirable scale and distribution of food shopping across the Council area.

Comparison Shopping Capacity

2.4.7 The Comparison Shopping Study followed a similar method to the Convenience Study but had to be modified to take into account the uncertainties evident in the available data.

2.4.8 The expenditure projections were derived from the population figures produced from the Council's own projections for the Structure Plan. Expenditure growth rates for comparison goods were derived from Data Consultancy published estimates. This produced the following comparison goods expenditure projections as set out in Figure 2.10.

Figure 2.10 - Comparison Expenditure Projections: Falkirk Council Area

		High Option		Low Option	
Year	Population	Expenditure per Head	Total Available Expenditure	Expenditure per Head	Total Available Expenditure
1997	143,210	£1,611	£231m	£1,527	£219m
2001	143,689	£1,902	£273m	£1,758	£253m
2006	144,325	£2,341	£338m	£2,097	£303m
2011	144,390	£2,883	£418m	£2,501	£362m
2016	145,468	£3,549	£516m	£2,983	£434m
2020	145,734	£4,191	£611m	£3,435	£501m

N.B. All Figures on a 1990 price base.
Source: Falkirk Council Comparison Shopping Capacity Study 1999.

2.4.9 Not all the expenditure from Falkirk Council residents will be spent in shops in the Falkirk Council area. The 1998 Household Survey compared favourably with the results of the 1985 Central Regional Council survey. Both were used to estimate the leakage of expenditure to other centres and the expenditure that flows into the Falkirk Council area.

2.4.10 The next stage of the study was to estimate the current turnover and floorspace ratios in order to convert the expenditure projections into new floorspace requirements. Current gross floorspace figures were available from Assessor's data but turnover ratios could only be derived using crude average ratios.

2.4.11 The uncertainties and errors in expenditure estimates, floorspace data and turnover, when projected forward to 2020, produced estimates that varied widely. In particular, increasing expenditure need not convert into extra floorspace. A number of approaches were therefore adopted to manage this uncertainty.

2.4.12 Firstly, the time horizon was reduced to 2006. Comparison was also made with the 1971 Census of Distribution, expressed in 1990 prices to give an indication of the kind of changes that have occurred over the last 20 to 30 years or so.

2.4.13 The main conclusion of the study was that comparison goods expenditure is expected to grow. If provision is not provided within the Falkirk Council area this is likely to lead to further leakage of expenditure to other centres. However, massive increases in floorspace did not seem credible when compared to historic changes. Due to the uncertainties involved, a precautionary approach seemed prudent if the role of existing centres were to be maintained. A modest increase in comparison floorspace of between 10,000m2 and 20,000m2 could be justified to strike a balance between retaining expenditure but without harm to existing centres.

2.5 Summary of Main Findings

2.5.1 Falkirk Town Centre's continuing success is central to the wider prosperity and image of the Council area. It is presently healthy and stable, but growth and improvement in other centres presents a continuing challenge to its market share. Consideration needs to be given to the strategic actions and developments needed to ensure that the Town Centre continues to thrive into the 21st century.

2.5.2 The District Centres have generally adapted to a more limited role focused on convenience shopping and local services, with most serving a good proportion of main food shopping needs. They are still very important to their respective communities. Action is necessary to ensure that they are capable of continuing to perform this role adequately. With changes in the distribution of population, consideration must be given to whether there is a need for other District Centres, or to raise any Local Centre to District Centre status.

2.5.3 Existing food shopping floorspace is concentrated heavily in Falkirk. Consideration must be given to the scale and distribution of any major new floorspace bearing in mind:

* *lack of spare capacity and limited future expenditure growth;*
* *changing store formats and operator's plans and policies;*
* *areas currently deficient in quality convenience shopping facilities, or likely to be as a result of future housing allocations;*
* *the importance of food shopping to the vitality and viability of existing centres; and*
* *the sequential approach.*

2.5.4 Most retail expenditure growth is expected to be in the non-food sector. There is continuing demand for retail warehouse space and pressure to allow a wider range of goods to be sold from off-centre retail warehouses. Scope exists for an extension to Central Retail Park to meet some of this demand. Managing and directing this demand requires consideration.

2.5.5 Shopping is a major trip generator. The future distribution of new retail facilities must attempt to minimise the length and number of car trips, and ensure access by modes of transport other than the car.

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