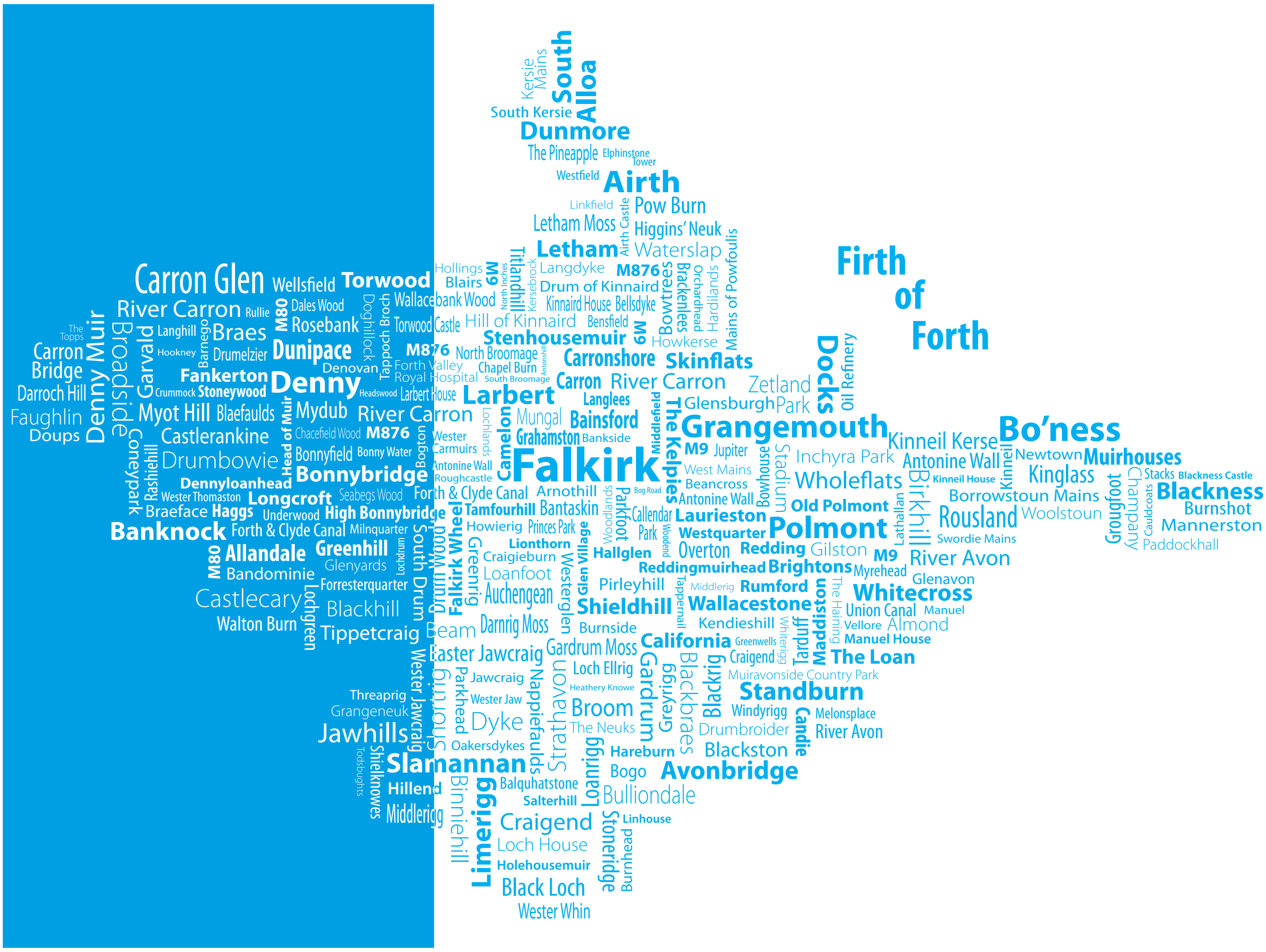
FALKIRK
Local Development Plan 2

Technical Report 7:
Town Centres and Retailing

February 2017



Falkirk Council

Falkirk Local Development Plan 2
Technical Report 7: Town Centres and Retailing

1. Introduction

1.1 This report provides the evidence base for the consideration of retail and town centre issues within the Main Issues Report of Falkirk Local Development Plan 2 (LDP2). It considers the following:

- Current Retail Trends
- Planning Policy Context
- Retail Provision in the Falkirk Area
- Shopping Patterns in the Falkirk Area
- The Network of Centres
- Assessment of Centres
- Conclusions

2. Current Retail Trends

2.1 Retailing is a dynamic and innovative industry which is continually evolving. In general retailing has long been the principal land use in town centres, and in turn the main source of town centre visits and economic viability. However the retail hierarchy has changed in recent decades as more mobile and affluent consumers have sought a wider range of goods and services at larger destinations, typically cities or purpose-built out of town shopping centres. In central Scotland the purpose-built centres at Braehead, Silverburn and the Forts (Glasgow and Edinburgh) now intervene in the hierarchy between the cities and major towns, diverting expenditure by mobile, affluent consumers.

2.2 Purpose built shopping and leisure destinations are able to provide premises which meet exactly occupiers' requirements in terms of space, access, servicing, security and visibility and overall mix of uses. On the other hand, town centres typically offer more traditional units with difficult servicing arrangements within older properties. Falkirk Town Centre is bolstered by the presence of Central Retail Park which offers a purpose built unit format in a location adjacent to the traditional centre.

2.3 As the market is changing, it is clear regeneration strategies must now look beyond retailing. Policy and action plans are increasingly geared towards encouraging people into town centres through employment, residential and community as well as retail uses.

2.4 Online retailing continues to be a significant challenge to town centres. Ryden report that e-retailing has grown to around 12% of expenditure and is expected to increase, with 20% market share for on-line retailing sometimes citied (Falkirk Town Centres Regeneration Update March 2015). The e-retailing challenge depends on the product but entertainment items such as books, dvds and video games have proved extremely popular to buy online. The closure of Blockbuster on the edge of Falkirk town centre illustrates this trend.

2.5 Leisure is reported to be the most active commercial sector at the moment which includes restaurants, bars, cafes and cinemas, and in some case hotels, bingo and health clubs. Leisure uses are a means of dealing with persistent vacancies. This is evident in the Falkirk area, where Calendar Square shopping centre now accommodates a large gym on its first floor, previously occupied by TKMax, which relocated to Central Retail Park. Similarly in Stenhousemuir town centre one of the new large retail units which remained for vacant for some years is now occupied by Stenhousemuir Gym which is run by Falkirk Community Trust.

2.6 Other trends include the continuing growth of supermarkets into the comparision shopping sector. Discount retailers such as Lidl, Aldi, B&M, and Home Bargains continue to be an active part of the retail sector, and are increasing their market share at the expense of the big four supermarket chains. This is evidenced in Camelon's Local Centre which now accommodates the discounters Aldi and Home Bargains.

2.7 There is also a move towards more frequent household shopping trips rather than the traditional big weekly shop. Growth in the local neighbourhood store formats continues, perhaps reflecting the move towards more top up shopping.

3. Planning Policy Context

National Policy

3.1 Maintaining and improving the health of town centres is a major strand of Scottish Government policy. In 2012, the National Review of Town Centres was initiated, culminating in the Town Centre Action Plan (2013) and the incorporation of the 'town centre first' principle within Scottish Planning Policy (SPP).

3.2 National Policy on town centres and retailing is contained within SPP which was published in June 2014. The key points are summarised below:

- Promotion of the town centre first principle when planning for uses which attract significant numbers of people, including retail and commercial leisure, offices, community and cultural facilities.
- Development plans, decision making and monitoring should support successful town centres. A mix uses should be encouraged throughout the day and evening to support their vibrancy, vitality and viability. Opportunities for promoting residential use should be considered.
- Development plans should identify a network of centres and explain how they complement each other. The network is likely to include town centres, local centres and commercial centres and may be organised as a hierarchy.
- Local authorities should prepare a town centre health check which is updated every two years. This will assess a town centres strengths, vitality and viability, weakness and resilience. It will be used to inform development plans and decisions on planning applications.
- Development plans should address any significant changes in the role and function of centres over time, where change is supported by the results of a health check. Plans should assess how centres can accommodate development and identify opportunities.
- If there are concerns about the clustering of some non-retail uses in some town centres and local centres, development plans should include policies to support an appropriate mix of uses and if the character or amenity of

centre is undermined include policies to prevent over-provision and clustering.

- A sequential town centre first approach should be adopted for uses which generate significant footfall, including retail and commercial leisure uses, offices and other public buildings.

3.3 The new SPP, with its town centres first policy, post-dated the drafting of the LDP1 policies and although the Reporter adjusted them to reflect this, LDP2 will seek to align its policies and proposals more fully with the SPP.

Development Plan Policy

3.4 Current retail policy in the Falkirk area is contained within Falkirk Local Development Plan (LDP1) adopted July 2015. The Falkirk area has a long established network of centres which includes Falkirk Town Centre, four District Centres, and a series of Local Centres. The Falkirk Gateway is included in the hierarchy as a commercial centre on the basis of a proposed 25,000 sq.m. household shopping development which was to be complementary to Falkirk Town Centre. The roles of the different types of centre are set out in Figure 1.

Figure 1 Network of Centres

Type	Centres	Role
Principal Centre	**Falkirk**	Serves area-wide catchment in terms of comparison and convenience shopping. Provides an extensive range of shops, services, leisure/cultural activities and community facilities. Major visitor destination.
District Centres	**Bo'ness** **Denny** **Grangemouth** **Stenhousemuir**	Serve the larger towns in terms of main food shopping, limited comparison shopping and services.
Local Centres	**Bainsford/Newcarron** **Banknock** **Bonnybridge** **Brightons** **Camelon** **Charlotte Dundas** **Grahamston** **Kinnaird Village** **Larbert** **Laurieston** **Polmont** **Redding** **Slamannan** **Whitecross**	Serve the smaller towns and suburbs in terms of top-up shopping and limited local services. In larger catchments may be anchored by larger store serving proportion of main food shopping needs.
Commercial Centre	**Falkirk Gateway**	Provides out-of town focus for household shopping and leisure complementary to Falkirk Town Centre.

3.5 Falkirk's network of centres provides the focus for retail, leisure, cultural and major community uses in the area. In accordance with national policy whilst retailing remains a key component in centres, there is increasing emphasis on a diversity of different uses to maintain vitality and viability and maintain a vibrant economy throughout the day and evening.

3.6 LDP1 contains the following specific policies on town centres and retailing:

Policy TC01 'Network of Centres' sets out the Council's retail strategy which directs all new retail development and commercial leisure development to the network of centres. New food shopping will be a priority in Denny, Bonnybridge and Bo'ness Town Centres and in the new Local Centres of Banknock, Kinnaird Village and Whitecross.

Policy TC02 'Development and Changes of Use in Centres' introduces a more flexible approach for new development and changes of use in town centres. In the core area of Falkirk Town Centre proposals for non-retail uses on the ground floor are acceptable provided proposals can demonstrate they will support the Town Centres shopping and tourism function.

Policy TC03 'Retail and Commercial Leisure Development' sets out the criteria for assessment of significant proposals outwith centres. The threshold for significant development is 1,000 sq.m. Proposals will be subject to a variety of policy tests to assess its acceptability including:

- Impact on vitality and viability of identified centres;
- Need for the development;
- Ability to meet sequential test;
- Accessibility of proposal

Retail Impact Assessments are required for developments in excess of 2,500 sq.m.

Policy TC04 'Food and Drink' recognises that such uses can form an important component of the local economy and contribute to the vitality and viability of centres. It also provides safeguards to ensure any adverse impact on residential amenity is avoided.

4. Retail Provision in the Falkirk Area

4.1 An updated retail floorspace survey of the Falkirk Council area was completed in July/August 2014 by the Development Plan Team, to help inform LDP2. The survey is undertaken every five years and was previously carried out in 2004 and 2009. The last full floorspace survey was carried out in 2009, in the early stages of the recession. A fresh survey was required to identify trends and issues in retail provision, and to provide an up-to-date basis for the formulation of retail policy in the next plan.

4.2 The database comprises retail properties within the Council area, and non-retail services are also included, in acknowledgement of the fact that such services form an increasingly important function of town centres. Uses are classified according to GOAD codes, which in turn are aggregated up in the four broad categories of convenience, comparison, services and vacant.

4.3 The survey work was carried out over the summer of 2014. All properties in the database were visited by the survey team and any changes to the occupiers and/or use were recorded.

4.4 Figures 1 and 2 show the amount of floorspace and numbers of units recorded by category in the various centres in 2014 with the 2009 figures alongside for comparison.

Figure 2 Gross Retail Floorspace 2014 in sq.m. shown in bold (2009 figures in grey)

	Conv.	Comp.	Service	Vacant	Total
Principal Centre					
Falkirk T C	**22,930** 27,620	**75,599** 83,999	**37,636** 33,621	**25,894** 15,945	**162,059** 161,185
District Centres					
Bo'ness	**5,098** 4,995	**2,423** 1,649	**4,631** 4,664	**826** 1,134	**12,978** 12,442
Denny	**1,619** 1,752	**856** 1,150	**2,779** 2,469	**397** 651	**5,651** 6,022
Grangemouth	**9,978** 9,350	**4,348** 4,522	**6,108** 4,292	**1,016** 2,017	**21,450** 20,181
Stenhousemuir	**5,096** 4,417	2508 1,332	**2701** 2,247	**773** 2,985	**11078** 10981
Local Centres					
Bainsford	**132** 132	**205** 205	**455** 499	**190** 146	**982** 982
Bonnybridge	**1,428** 1,045	**776** 886	**3,324** 2,177	**451** 344	**5,979** 4,452
Brightons	**298** 498	**480** 893	**802** 389	**460** 341	**2020** 2,121
Camelon	**7,617** 610	**386** 500	**1,994** 2,174	**837** 0	**10,834** 3,284
Charlotte Dundas	827 710	509 439	947 832	880 1,182	3163 3,163
Grahamston	**1,070** 209	**1,662** 1,559	**1,735** 1,747	**418** 1,015	**4,885** 4,530
Laurieston	**628** 628	**350** 505	**1193** 1038	**0** 0	**2,171** 2,171
Larbert	**501** 501	**306** 359	**1,193** 1,038	**0** 57	1954 1,955
Newcarron	**4,258** 5,186	**4,546** 4,546	**288** 364	**1,004** 0	**10,096** 10,096
Polmont	**2,509** 2,509	**0** 0	**1,530** 1,480	**0** 50	**4,039** 4,039
Slamannan	**308** 288	**47** 47	**401** 186	**0** 235	**756** 756
Out of Centre					
Bo'ness	**1,683** 1,997	**60** 103	**965** 648	**114** 75	**2,822** 2,823
B'bridge/Banknock	**1,348** 1,556	**686** 396	**4,206** 1,411	**799** 243	**7,039** 3,606
Denny	**3,738** 3,577	**245** 194	**1,678** 891	**384** 242	**6,045** 4,904
Falkirk	**4,760** 4,646	**12,405** 18,077	**4,404** 4,009	**2,885** 1,692	**24,454** 28,424
Grangemouth	**1,754** 1,708	**668** 1,712	**12,108** 2,155	**96** 61	**14,626** 5,636
Larbert/S'muir	**1,869** 1,359	**146** 267	**2,053** 1,193	**1,152** 103	**5,220** 2,922
Polmont Area	**1,000** 1,129	**198** 97	**1,181** 1,102	**129** 318	**2,508** 2,646
Rural	**1,249** 1,445	**5,754** 5,153	**1,242** 1,242	**179** 235	**8,424** 8,075
Total	**88,618** 77,867	**115,163** 128,590	**95,508** 71,868	**38,884** 29,071	**338,173** 307,396

Figure 3 Number of Unit 2014 shown in bold (2009 figure in grey)

	Conv.	Comp.	Service	Vacant	Total
Principal Centre					
Falkirk T C	**19**	**172**	**203**	**106**	**500**
	25	231	180	55	491
District Centres					
Bo'ness	**13**	**29**	**44**	**9**	**95**
	11	26	43	12	92
Denny	**5**	**11**	**34**	**7**	**57**
	6	15	32	10	63
Grangemouth	**14**	**24**	**49**	**13**	**100**
	10	23	37	24	94
Stenhousemuir	**6**	**11**	**28**	**3**	**48**
	8	10	23	5	46
Local Centres					
Bainsford	**1**	**3**	**9**	**4**	**17**
	1	0	11	5	17
Bonnybridge	**5**	**9**	**29**	**5**	**48**
	5	11	24	4	44
Brightons	**3**	**5**	**8**	**3**	**19**
	4	9	4	3	20
Camelon	**9**	**5**	**22**	**7**	**43**
	6	8	25	0	39
Charlotte Dundas	**5**	**4**	**4**	**6**	**19**
	4	3	4	8	19
Grahamston	**5**	**9**	**31**	**4**	**49**
	3	8	27	9	47
Laurieston	**3**	**3**	**18**	**0**	**24**
	3	5	16	0	24
Larbert	**3**	**5**	**20**	**0**	**28**
	3	6	18	1	28
Newcarron	**3**	**5**	**2**	**3**	**13**
	2	5	3	0	10
Polmont	**4**	**0**	**14**	**0**	**18**
	4	0	13	1	18
Slamannan	**3**	**1**	**9**	**0**	**13**
	3	1	3	6	13
Out of Centre					
Bo'ness	**12**	**1**	**18**	**4**	**35**
	15	2	14	4	35
B'bridge/Banknock	**8**	**4**	**23**	**8**	**43**
	10	7	17	3	37
Denny	**15**	**3**	**17**	**4**	**39**
	15	3	10	4	32
Falkirk	**32**	**29**	**65**	**13**	**139**
	30	43	63	22	158
Grangemouth	**15**	**8**	**42**	**4**	**69**
	16	16	27	1	60
Larbert/S'muir	**16**	**3**	**24**	**6**	**49**
	14	8	18	2	42
Polmont Area	**13**	**3**	**16**	**3**	**35**
	13	3	15	6	36
Rural	**13**	**8**	**9**	**2**	**32**
	14	5	9	3	31
Total	**226**	**355**	**738**	**214**	**1533**
	225	450	635	186	1496

4.5 In terms of trends 2009-2014, the following key points emerge from the survey:

- The overall floorspace recorded in the survey has risen to 338,173 sq.m (an increase of 30,777 sq.m. from 2009). This is partly as a result of further retail development, and partly through the inclusion of more existing commercial properties.
- Overall convenience provision has increased, reflecting new investment in foodstores in Camelon and Redding. However, comparison provision has reduced significantly, reflecting the impact of the recession and online shopping, and consequent structural changes in the retail sector.
- The service sector continues to increase, reflective of the more diverse role and character of centres.
- Vacant floorspace has again increased significantly, reflecting continuing difficult economic conditions since 2009.
- Falkirk Town Centre has seen a dramatic increase in vacant floorspace, with the core area particularly affected.
- The District Centres have been less affected, and have generally held up well, with Bo'ness, Grangemouth and Stenhousemuir recording reductions in vacant units. They appear to have been less affected by strategic retail change since they are focused on local convenience shopping and services. Denny Town Centre is in the middle of significant physical restructuring, with demolitions having taken place but new development yet to commence, but even there, vacancies have fallen.
- The Local Centres also appear to be holding up well. Most remain relatively stable. Camelon has expanded with the addition of Tesco and Aldi, and now rivals the District Centres in terms of scale of floorspace, whilst Bonnybridge has also benefited from new development and a commensurate increase in floorspace. The exception is Newcarron, where vacancies in the mall and a reduction in the size of the Co-op reflect increased competition and pressure from other District and Local Centres which have improved their offer.
- The floorspace figures do not take account of the comparison floorspace within large foodstores, which is of increasing significance. It is estimated that this amounts to around 13,000 sq.m.

5. Shopping Patterns in the Falkirk Area

5.1 In 2009, the Council carried out a Household Survey to investigate shopping patterns in the Council area. Although the findings are somewhat out of date it still provides a useful indication of the behaviour of residents of the Council area in terms of preferred shopping locations.

5.2 In terms of food shopping, the 2009 Household Survey illustrated the historic dominance of Falkirk stores, although under the influence of the Council's policy of decentralising food shopping to District and Local Centres, this had started to change, with the ASDA stores at Stenhousemuir and Grangemouth stemming the outflow of expenditure from Larbert/ Stenhousemuir. Since 2009, the opening of the Tesco at Redding, coupled with the closure of the Callendar Road Tesco is likely to have similarly addressed leakage from the Braes areas to Falkirk. The opening of the Tesco at Camelon is likely to have intercepted expenditure flows from the west of the district. Convenience expenditure leakage is still likely to be high from Bo'ness, Bonnybridge and Denny, but there appears no market interest in foodstores of a sufficient scale to reverse this leakage

5.3 In terms of comparison shopping, the 2009 Household Survey found that Falkirk Town Centre/Central Retail Park was the location last visited by 66% of Falkirk Council households. However the popularity of other major centres was evident then, with Stirling attracting 10% of the market share for clothing/footwear purchases, and Edinburgh/Glasgow 7%. Since 2009, with the loss of national multiples in Falkirk, the increasing attraction of the city and regional centres, and the rise of internet shopping, the level of retention of comparison expenditure is likely to have dropped.

5.4 Ryden undertook property market research in 2015 to support the Council's Town Centre Strategy Review. Their research referenced Experian estimates of 40% expenditure leakage to Falkirk's top four competitors (Glasgow, Stirling, Livingston and Edinburgh). CACI estimates 48% comparison goods expenditure retention in Falkirk's core catchments. It is therefore clear that leakage from Falkirk to other major shopping centres is a trend which is set to continue.

6. Assessment of Centres

6.1 As outlined already the LDP defines a network of centres, categorised under four types: principal centre, district centres, local centres and commercial centres.

6.2 The following assessment of the centres is based on the Town Centre Health Check prepared in 2016 by the Development Plan Team. Town centre Health Checks are a requirement of SPP as a means of properly assessing the state of town centres. The Council's Health Check pulls together a range of data from a wide range of sources and presents this under a list of indicators which have been adopted from Annex A of the SPP. It is anticipated that the Health Check will be updated every two years.

<u>Falkirk</u>

6.3 Falkirk is an historic burgh town centre of sub-regional scale with a traditional high street at its core, off which two modern shopping centres, the Howgate and Callendar Square were developed in the 1980s/90s. It has since expanded to the north through the development of Central Retail Park and a Morrisons superstore.

6.4 The environment of the Town Centre is relatively good, with the conservation area and historic buildings at its core, which are currently being enhanced through the £5.5m THI scheme. There are few vacant sites, but the increased incidence of vacant shop units is having a detrimental effect on the appearance of the centre.

6.5 The Town Centre supports a diverse range of activities and uses, commensurate with its role as the principal centre in the Council area. Historically, its strengths have been as a retail and administrative centre serving the area, and whilst these functions remain important, retail services, leisure and community uses are becoming more significant, in common with national trends. The Town Centre has not traditionally had a strong office sector apart from accommodating the local authority headquarters, although there are some recent signs of increased activity. It also has a relatively small resident population, although there are some signs of new residential development

6.6 Whilst there remains a significant representation of national retailers within the Town Centre, during the recession the High Street has lost some key names such as Woolworth, HMV, WH Smith and BHS. Vacancy levels have increased significantly, particularly in the prime areas, and were significantly higher than the Scottish average in 2014/15. The Howgate and Callendar Square shopping centres are unable having to diversify as they face lower demand, and the size of units do not typically suit the requirements of larger retailers.

6.7 By contrast, Central Retail Park, with its larger, more flexible units has enabled the retention and even attraction of some national retailers. The Retail Park is approaching full and vacant units are usually taken up quickly, recent additions include The Range and Marks and Spencer Simply Food. Whilst the Retail Park is part of the Town Centre, links with the Town Centre could be better, and there is a perception that its success has been to the detriment of the traditional town centre.

6.8 Convenience shopping remains an important component of the Town Centre’s role and vitality, with Tesco, Asda and Morrison’s and Lidl continuing to provide important anchors. Nonetheless, a degree of convenience spending has been clawed back to local areas by the opening of local stores. Comparison expenditure leakage to other competing regional and sub regional centres such as Stirling, Glasgow and Edinburgh is likely to be increasing.

6.9 A key characteristic of the town centre is its independent sector, and the continuing variety of distinctive local retailers is an important asset in the changing retail environment.

6.10 The growth in tourism in the Falkirk area, on the back of the Falkirk Wheel and the Kelpies/Helix, is a particular opportunity for the Town Centre, but not one that has yet been fully exploited; it remains a centre primarily used by Falkirk Council residents. Better linkages with the town’s other tourism assets would be beneficial

6.11 In terms of accessibility, access to the Town Centre by public transport is generally good, although the quality of the key arrival points at Grahamston railway station and the bus station is poor. Access by car is generally good, subject to congestion at peak times, with extensive, relatively cheap parking. Walking is a mixed experience, with the pedestrianised centre contrasting with the barriers presented by the busy peripheral roads. Signage in and around the Town Centre for pedestrians has recently seen some improvement.

6.12 The Town Centre is designated an Air Quality Management Area.

6.13 The Town Centre has had a successful Business Improvement District since 2008. Recently, businesses voted to continue this for a third period. The BID carries out a variety of projects from the hiring of taxi marshals and street ambassadors to supplying hanging baskets and bins for chewing gum.

6.14 In terms of future development opportunities the LDP identifies two potential large scale opportunities at Grahamston and the East End of Falkirk:

- Grahamston Opportunity Area. This site provides an important gateway to the town centre by road and rail. Currently predominantly a surface car parking area it has the potential for redevelopment and enhancement. Potential future uses could include retail/leisure/office and residential. A Brief/Masterplan is required

- Falkirk East End Opportunity Area. This is a prominent site at the east end of the Town Centre which offers redevelopment opportunities. The site includes the bus station. Potential futures uses include retail/leisure/office and residential. A Brief/Masterplan is required.

6.15 There is an expectation that Falkirk town centre will need to continue with its diversification into independent retail, services, leisure and tourism. This is considered necessary or at least will balance the trend that is emerging that many national retailers prefer purpose-built premises, as demonstrated by the migration into the purpose built units in Central Retail Park. It will also help Falkirk remain competitive in the face of ever increasing competition from other centres and leisure attractions.

Bo’ness

6.16 Bo’ness is a small traditional historic district centre adjacent to the River Forth and providing local shopping and services for a population of about 14,700. It is distinguished by its exceptional historic environment, which has been improved through the recent Townscape Heritage Initiative, and its latent tourism potential arising from various attractions in the town.

6.17 Convenience shopping remains an important function with small Tesco and Lidl stores anchoring the centre at its east end. Convenience floorspace has increased over the past 10 years, through the arrival of Lidl and the expansion of Farmfoods. However, the proportion of Bo’ness residents doing their main food shopping in the Town Centre has declined significantly over recent years accelerated by the opening of the large Asda in Grangemouth, reflecting the challenge of getting the substantial resident population of Bo’ness to use the Town Centre. There is a good range of retail services and cafes, but comparison shopping is very limited. Vacancies are at a relatively low level

6.18 In terms of future development opportunities, the Bo’ness foreshore regeneration opportunity allocated in LDP1 is not viable due to high development costs and local housing market conditions. However, the part of the opportunity fronting Links Road may have short to medium term potential. Residential/commercial opportunities at Union Road and Main Street/South Street are identified in the LDP, and part of the latter site has a recent planning consent. The LDP also identifies the potential for improved convenience shopping to assist in retaining more local expenditure.

Denny

6.19 Denny is a small centre combining a traditional shopping street on the east side of Stirling Street with 1960s precinct on the west that is undergoing redevelopment.

6.20 Phase 1 of the town centre redevelopment is providing 10 small to medium sized retail units, a new library building and public square for the town. The Council has delayed remarketing of the Phase 2 site, which is intended for a single retail store, pending the completion and occupation of Phase 1.

6.21 The Town Centre retains a convenience shopping presence in the Co-op store, although this is a small store, and only a minority of residents do their main shopping there. The other store in the town, a small Sainsburys, is off-centre. Most convenience expenditure leaks out to Falkirk, especially following the opening of the new Tesco store in Camelon. Phase 2 of the town centre redevelopment was intended to provide an opportunity to reverse some of this leakage, but market interest to date has been low, and the site is relatively small.

6.22 There is a good range of retail and community services, but a very limited comparison shopping offer.

6.23 Accessibility to the town centre is hampered by the volume of traffic and congestion at Denny Cross. A long-standing proposal to provide a southern bypass for the town, the Denny Eastern Access Route is now under construction and may alleviate some of the heavy traffic especially at peak time congestion around the town centre.

Grangemouth

6.24 Grangemouth Town Centre is the second largest centre in the Council area. It is made up of a 1960s shopping centre (refurbished in the 1990s) comprising La Porte Precinct, York Arcade and Square and traditional buildings on Bo'ness Road. It was extended to the north in 2006 through a new Asda development behind the town hall.

6.25 The modern town centre is pedestrianised to the south of Bo'ness Road with the main car park facing the rear of the buildings at Union Road which is not therefore an attractive entrance for visitors. The Asda car park links to the main part of the centre via a pedestrian route alongside the town hall. There is no green space in the town centre although there is a bowling club on Talbot Street. Bo'ness Road has a number of attractive buildings including the Town Hall and library. The former La Scala Cinema on Bo'ness Road is also listed.

6.25 There is a strong convenience shopping presence through Asda, Farmfoods, and the former Tesco store which is now a B&M store, and a high level of expenditure retention as a consequence. There is also a good representation of retail and community services. Comparison floorspace has reduced but still makes up a sizeable part of the mix.

6.26 The 2014 floorspace survey showed a reduction in vacancy levels compared with 2009, although the town has since lost some key retailers.

6.27 The need for investment and upgrading of the centre has been recognised by the Council. However, efforts to secure development partners to take forward regeneration have so far been unsuccessful due to adverse market conditions post-recession.

Stenhousemuir

6.28 Stenhousemuir Town Centre was a 1960s precinct style centre which has recently undergone a substantial redevelopment which was completed in 2010. The restructuring created a new 40,000 sq ft Asda foodstore, new non-food retail floorspace and a new library, health centre and civic space with public art. The retail floorspace of the centre has doubled in size and vacancy rates are low and remain the same as 1996. Whilst some of the new large retail units remained vacant for some time, more recently the largest unit has been acquired by Stenhousemuir Gym which is run by Falkirk Community Trust.

6.29 The integration of the new retail units with the original 1960s shopping precinct and shops on Main Street has not been as effective as it could have been which in part can be attributed to the new access road which bisects the town centre, creating a barrier between the old and new shopping areas. Drysdale Foundry continues to occupy a central site within the District Centre and although designated in the LDP as ‘Business Area with Potential for Redevelopment’ there are no known relocation plans by the company. The foundry is highly visible and has a significant presence visually and in terms of noise. Improved landscaping around its boundary would help screen the foundry more effectively in the future. Development of the former police station site for 18 flats is nearing completion

6.30 In terms of future development opportunities, sites with the town centre are limited. However at the northern edge of Stenhousemuir on the other side of Main Street the former McCowan factory site is likely to provide development potential for uses compatible with the town centre. It is currently outwith the town centre boundary.

Local Centres

6.31 The Local Centres vary considerably in their size and character. Some are small traditional town, village or suburban centres, characterised by shops on the ground floor of tenemental properties, whilst others are modern centres based around anchor foodstores. Generally they fulfil top-up shopping and service needs.

6.31 Camelon’s Local Centre has increased significantly to a scale comparable to the smaller District Centres. As well as a new Tesco store, recent additions include the discounters Aldi and Home Bargains.

6.32 The future of Newcarron Local Centre is uncertain. The Co-op which is currently the anchor at the Carron Centre has plans for restructuring. It is understood that the Coop no longer want a store of this size, as trade has been impacted on by other developments. It is evident that the Carron Centre needs restructuring to achieve a sustainable balance of uses, and remain as an important centre serving the growing area of North Falkirk.

6.33 A new local centre at Kinnaird village has opened comprising six units, with a Sainsbury Local as its anchor store. Two of the adjacent units are occupied by fast food outlets, but three units still remain vacant.

6.34 At Polmont the Co-op in the Local Centre has been replaced by an Aldi store and Bonnybridge has seen the addition of a new Tesco Express.

Falkirk Gateway

6.35 Falkirk Gateway is part of Falkirk's network of centres. Although not implemented yet, LDP1 envisaged that it would provide a new edge of town commercial centre for household shopping and leisure complementary to the traditional town centres. However, it is clear that there is no longer a market for this scale and type of development, and so the development mix needs to be revisited. In these circumstances it is unlikely that its continuing status as a commercial centre in the network of centres can be justified.

7. Conclusions

7.1 Falkirk Town Centres remains a strong retail location with the core town centre bolstered by a successful retail park. The biggest risks come from the changes in the national retail hierarchy and the pull of the larger destinations, online sales and the withdrawal of some national retailers. Continued retail diversification is required in Falkirk town centre to offset the decrease in national retailers / relocation to Retail Park. This will include continuing to increase the number of independent shops, maximising tourist and leisure opportunities, and attracting new national retail. Continuing to increase the housing stock in the town centre will also help footfall and increase viability and vitality.

7.2 The District Centres of Bo'ness, Denny, Grangemouth and Stenhousemuir have been less affected than Falkirk by strategic retail change as each serves local district markets with largely convenience shopping and local services. Whilst the District Centres also benefit from close proximity to their customers, they are not immune from competition as cities, malls, the internet and superstores can erode their markets gradually over time. Whilst the Stenhousemuir regeneration has not been entirely successful in urban design terms, it is an example of how a centre can remain attractive to local customers for a range of activities and services.

Some of the main issues for LDP2 are highlighted below:

- Need to emphasis town centre first principle, and revise policies and supporting information accordingly.

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- Consider the status of Central Retail Park and whether it should be excluded from the town centre in order to prioritise the town centre first principle.

- The future of Falkirk Gateway as a commercial centre needs to be considered to better reflect the town centre first principle and market conditions.

- Recognise the potential of alternative uses to encourage people into the town centre and district centres, rather than retail only focus. Residential, office, leisure cultural and community uses will have an increasing role to play in the continued vitality and viability of the town centre and district centres.

- Pedestrian connections within Falkirk Town Centre need to be improved, to better integrate the Retail Park with the town centre and the future the opportunity sites at Grahamston and the East End. Improvement of pedestrian signage and movement from the town's two railway stations is particularly important.

- In terms of local centres, the future of the Carron Centre needs to be considered as a potential redevelopment opportunity to create a more viable balance of uses.

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Local Development Plan 2

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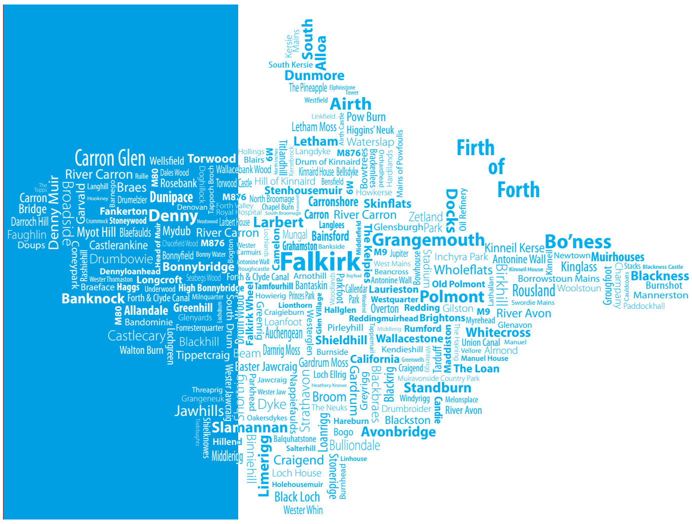

Falkirk Council