

# Background Paper

## Retail



## 1. Introduction

1.1 This monitoring report provides a breakdown of retail floorspace within Renfrewshire's Network of Centres and details the levels of vacant commercial floorspace within the network.

## 2. Renfrewshire's Network of Centres

2.1 The Renfrewshire Local Development Plan identifies a sustainable Network of Centres which comprises of a mix of:

- Strategic Town Centres;
- Core Town Centres;
- Local Service Centres; and,
- Retail Warehouse Parks.

2.2 Each centre within the network provides a complementary role and function which comes together to provide a sustainable distribution of centres as places to live, shop, work, enjoy entertainment, leisure and cultural activities and gain access to important transport routes.

## 3. Strategic Town Centre and Core Town Centre Floorspace

3.1 Figure 1 provides a breakdown of the comparison and convenience retail floorspace in addition to the other ground floor commercial floorspace within Renfrewshire's Strategic and Core Town Centres. Approximately 70% of Renfrewshire's total comparison retail floorspace (excluding bulky goods) is within the two Strategic Town Centres (Paisley town centre and Braehead town centre). The Core Town Centres are targeted more at local need and as such there is a greater proportion of convenience retail floorspace within these centres.

### Strategic and Core Town Centre Commercial Floorspace 2012

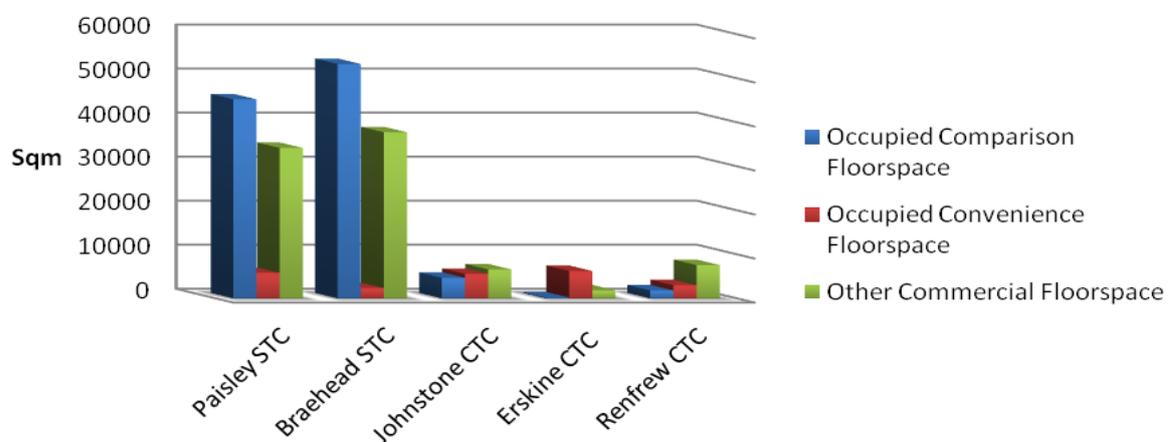


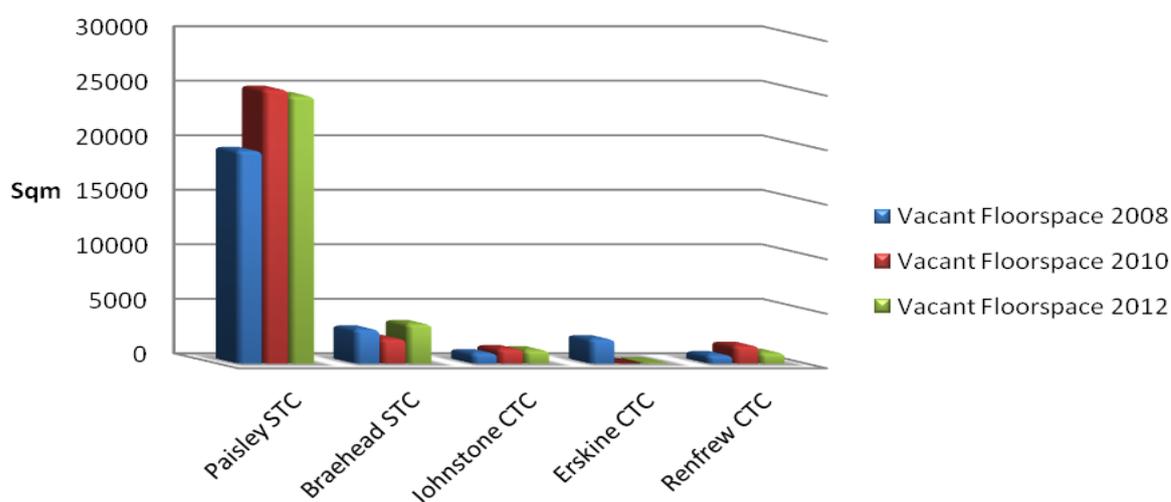
Figure 1: Strategic Town Centre and Core Town Centre Commercial Floorspace 2012

	Occupied Comparison Floorspace (sqm)	Occupied Convenience Floorspace (sqm)	Other Commercial Floorspace (sqm)
<i>Paisley STC</i>	45216	5772	34174
<i>Braehead STC</i>	53246	2343	37725
<i>Johnstone CTC</i>	4663	5558	6576
<i>Erskine CTC</i>	205	6218	1821
<i>Renfrew CTC</i>	1807	2996	7564

Source: 2012 Assessor Floorspace and Renfrewshire Retail Study 2012

Figure 2 details the amount of vacant floorspace within these centres during the period 2008–2012.

### Vacant Strategic and Core Town Centre Commercial Floorspace 2012



	Vacant Commercial Floorspace 2008 (sqm)	Vacant Commercial Floorspace 2010 (sqm)	Vacant Commercial Floorspace 2012 (sqm)
<i>Paisley STC</i>	19541	25157	24571
<i>Braehead STC</i>	3165	2286	3657
<i>Johnstone CTC</i>	990	1361	1245
<i>Erskine CTC</i>	2274	0	103
<i>Renfrew CTC</i>	806	1671	1024

Source: 2012 Assessor Floorspace and Renfrewshire Retail Study 2012

Figure 2: Vacant Commercial Floorspace within Renfrewshire's Town & Strategic Centres 2012

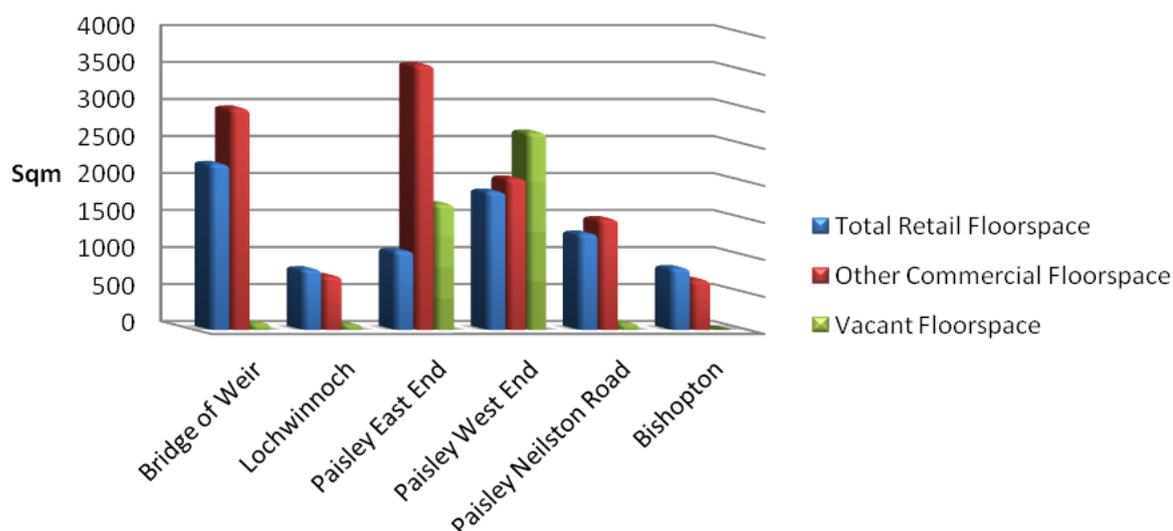
- 3.2 There has been little change in the total amount of vacant commercial floorspace in Renfrewshire's Strategic Town Centres and Core Town Centres during the last 2 years.
- 3.3 Paisley Strategic Town Centre continues to be put under considerable strain by the influence of Glasgow City Centre, shopping centres such as Braehead and Silverburn and also the emergence of new forms of retailing such as the internet. In 2012, 22% of commercial floorspace was vacant within the town centre, which is a reduction of 586 sqm when compared to 2010. However, during the same period the total amount of vacant units increased from 89 to 110. In responding to this decline The Paisley Vision initiative, through a town centre action plan has co-ordinated action to improve the market offering, profile and physical fabric of the town centre.
- 3.4 Braehead's retail function faces substantial challenges which are heightened by the wider economic situation. In recent years the amount of vacant retail floorspace has increased with the national closures of retailers such as Barretts, Jane Norman and Birthdays, however, the overall amount of vacant floorspace is still low with a number of new retailers moving into the centre. Braehead continues to strengthen its position as a strategic retail location within the Glasgow and the Clyde Valley area and Scotland as a whole. Braehead has been successful in attracting shoppers from an extensive catchment area due to the breadth of the retail and leisure offer, its accessibility from the motorway network and the availability of car parking and integrated public transport provision. The centre is part of a wider mixed use development and is the catalyst for transforming and regenerating the riverside area from Braehead to Renfrew town centre which is a key component of the Clyde Waterfront Flagship initiative.
- 3.5 The Core Town Centres have done reasonably well in recent years against the backdrop of a challenging economic climate, with relatively low levels of vacant commercial floorspace. These centres are not in competition with the larger centres highlighted above and they are targeted at local need. This has enabled them to adapt and find their role more easily than Paisley Town Centre.

#### **4. Local Service Centres**

- 4.1 Local Service Centres perform a vital role in supporting many local communities within Renfrewshire. These centres have more localised catchment areas providing a range of day to day goods and local services. Most of the local centres continue to perform well with little vacant floorspace and a good mix of uses.
- 4.2 The local centres in Paisley's west end and east end continue to have high vacancy rates with approximately 40% and 27% of commercial floorspace vacant within these centres respectively. A more flexible approach to development is required to encourage other complementary uses in and around these centres, to ensure they continue to fulfil an important role in supporting the local population, providing retail and commercial uses which add to the range and choice of uses available in the Paisley area.

4.3 Work has started to demolish the existing Linwood Local Service Centre, which was no longer fit for purpose and had been experiencing high vacancy rates for a number of years. It is envisaged that proposals to re-develop Linwood Service Centre will result in dramatic improvements in terms of the vitality and viability of this centre.

## Local Service Centre Floorspace 2012



	Total Retail Floorspace 2012 (sqm)	Other Commercial Floorspace 2012 (sqm)	Vacant Floorspace 2012 (sqm)
<i>Bridge of Weir LSC</i>	2242	2992	89
<i>Lochwinnoch LSC</i>	821	728	69
<i>Paisley East End LSC</i>	1070	3580	1702
<i>Paisley West End LSC</i>	1869	2046	2667
<i>Neilston Road LSC</i>	1302	1497	86
<i>Bishopston LSC</i>	836	675	0

Source: 2012 Assessor Floorspace and Renfrewshire Retail Study 2012

Figure 3: Commercial Floorspace within Renfrewshire's Local Service Centres 2012

### 5. Retail Warehouse Parks

5.1 Almost 30% of retail floorspace in Renfrewshire lies within its 3 Retail Warehouse Park with approximately 96,000 sqm of occupied retail floorspace being within Abbotsinch retail Park; Braehead Retail Park; and Phoenix Retail Park. These Retail Warehouse Parks have been performing very well in recent years with no vacant floorspace in 2012.

5.2 Blythswood Retail Park has continued to perform badly with high vacancy rates and little investment. In 2012, approximately 80% of the 20,901 sqm retail floorspace was vacant in Blythswood Retail Park. This retail park is in a more marginal location and has struggled to attract retailers since the loss of key anchor stores a number of years ago. Blythswood Retail Park is identified as a Mixed Use Transition Area in the LDP. This more flexible

policy approach will allow for a greater mix of uses to help stimulate investment and improve the vibrancy of this area.

## **6. Retail Consents**

- 6.1 In total, proposed retail developments with detailed planning consent amounts to approximately 47,000sqm. The majority of this floorspace is in relation to developments by Tesco at Wallneuk, Paisley and Linwood Town Centre and developments for Class 1 bulky goods at Braehead, Abbotsinch and Phoenix Retail Warehouse Parks.

## **7. Summary**

- 7.1 Most town and local service centres within Renfrewshire continue to do reasonably well against the backdrop of a challenging economic climate for retailing. However, if the current prolonged period of austerity continues there are likely to be significant implications for the future patterns of retailing, particularly in Paisley Town Centre, where the amount of vacant retail units continues to increase. In response, co-ordinated action needs to continue to improve the market offering, profile and physical fabric of the town centre.
- 7.2 If a strategy of re-populating the town centre, through residential development proves successful, then it is anticipated that convenience retail floorspace can be consolidated and could grow to meet a potential increase in future demand. In turn, this may generate other retail services and entertainment uses, which could occupy part of the existing vacant floorspace.
- 7.3 Braehead has continued to strengthen its position as a regional retail and leisure centre, however, in light of proposed major new developments at competing centres, Braehead's retail function also faces considerable challenges which are intensified by the wider economic situation. Nevertheless, Braehead is in a strong position to attract major investment from the retail market and must continue to deliver an improved retail environment.