Background Report
Renfrewshire Annual Retail Survey

Renfrewshire Local Development Plan
Main Issues Report December 2011

Renfrewshire Council

This monitoring report provides a breakdown of commercial floorspace within Renfrewshire and details the levels of vacant floorspace within the Strategic Centres and Town Centres. The base date for this analysis is 1st October 2010.

Commercial Floorspace

There is approximately 575,225 square metres (sqm) of commercial floorspace in Renfrewshire which comprises 2,130 units. 416 of these units are vacant which amounts to 81,294 sqm (14% vacancy rate in terms of floorspace). This represents a slight improvement in comparison to the previous year when there was 86,044 sqm of vacant floorspace in Renfrewshire representing a 15% vacancy rate.

Figure 1 – Commercial Floorspace in Renfrewshire 2010

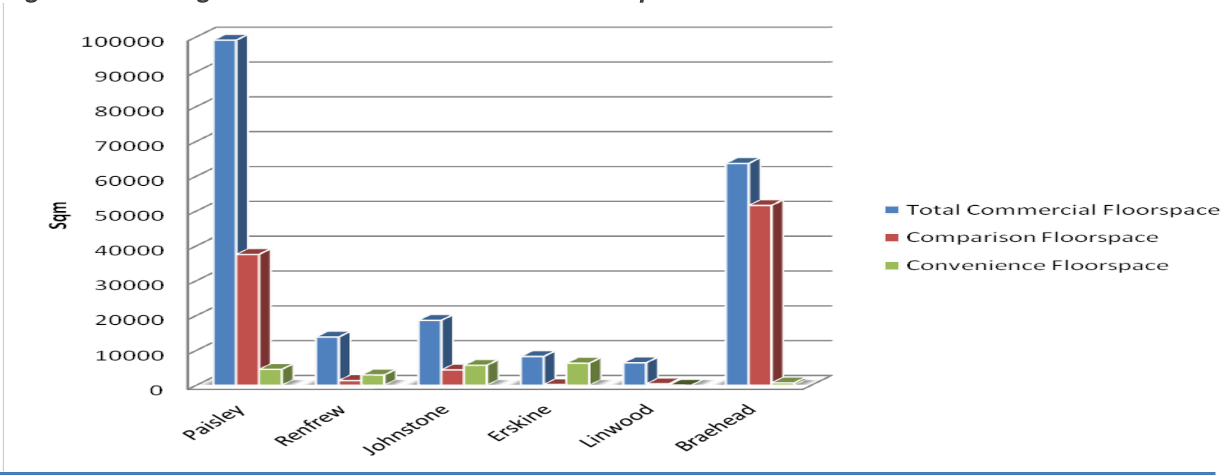
Category	Floorspace m2	% of Total Floorspace
Convenience	96,972	17
Comparison	112,468	20
Retail Warehouses	120,744	21
Hot Food, Restaurant, Pub	59,667	10
Financial and Professional Offices	28,698	5
Other Services (Hairdressers etc)	34,086	6
Car Sales	19,738	3
Medical Services	5,081	1
Bookmaker	5,669	1
Entertainment	2,304	0.5
Garden Centres	8,504	1.5
Vacant	81,294	14
Total	**575,225**	

Source: 2010 Assessor Floorspace and Renfrewshire Retail Study 2010

Strategic Centre and Town Centre Floorspace

Figure 2 provides a breakdown of the comparison and convenience floorspace in addition to the total commercial floorspace within Renfrewshire's Strategic Centres and Town Centres. Approximately 79% of Renfrewshire's total comparison retail floorspace (excluding bulky goods) is within the two Strategic Centres (Paisley town centre and Braehead). The other smaller town centres are targeted more at local need and as such there is a greater proportion of convenience retail floorspace within these centres.

Figure 2: Strategic Centre and Town Centre Floorspace 2010

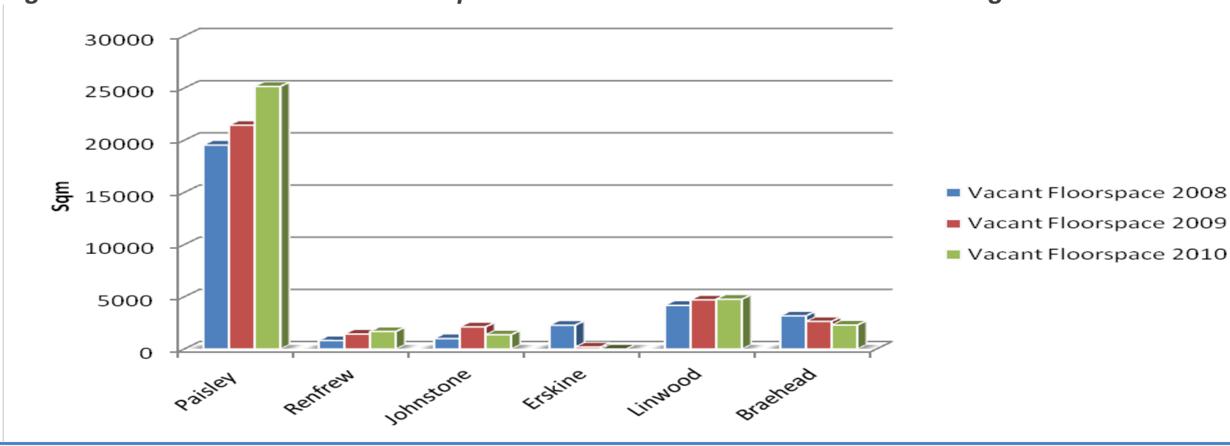


	Total Commercial Floorspace (sqm)	Occupied Comparison Floorspace (sqm)	Occupied Convenience Floorspace (sqm)
Paisley TC	99033	37545	4544
Renfrew TC	13815	1325	2940
Johnstone TC	18600	4377	5708
Erskine TC	8237	205	6321
Linwood TC	6439	394	0
Braehead	63674	51596	672

Source: 2010 Assessor Floorspace and Renfrewshire Retail Study 2010

Figure 3 details the amount of vacant floorspace within these centres during the period 2008–2010.

Figure 3: Vacant Commercial Floorspace within Renfrewshire's Town & Strategic Centres 2010



	Vacant Floorspace 2008 (sqm)	Vacant Floorspace 2009 (sqm)	Vacant Floorspace 2010 (sqm)
Paisley TC	19541	21432	25157
Renfrew TC	806	1422	1671
Johnstone TC	990	2108	1361
Erskine TC	2274	193	0
Linwood TC	4173	4696	4769
Braehead	3165	2638	2286

Source: 2010 Assessor Floorspace and Renfrewshire Retail Study 2010

While the total amount of vacant commercial floorspace in Renfrewshire has declined slightly over the last 3 years the amount of vacant commercial floorspace has increased in some of our town centres. Paisley Town Centre has witnessed a continual increase in the amount of vacant commercial units in recent years.

The High Street and the indoor malls comprise the retail core area within Paisley Town Centre. Over 50% of retail floorspace in Paisley Town Centre is contained within the two indoor shopping malls, the Paisley Centre (16,700m^2) and Piazza Shopping Centre (15,600m^2). Paisley 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 2010, 25% of the total commercial floorspace was vacant within the town centre, with an additional 5,616 sqm of vacant floorspace when compared to 2008. 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.

In recent years Braehead has continued to strengthen its position as a strategic retail centre 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 offer, its accessibility from the motorway network and the availability of car parking and integrated public transport provision. Braehead has continued to diversify its retail offer and a number of new stores, including Apple, have opened in the last year within the centre. 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.

The other town and village centres, with the exception of Linwood, 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. Linwood Town Centre has continued to decline in recent years due to a lack of investment and uncertainties over its regeneration, however, it is envisaged that proposals to re-develop the town centre will result in dramatic improvements in terms of the vitality and viability of this centre.

Retail Parks

More than 25% of retail floorspace in Renfrewshire lies within retail park locations. There are 4 retail parks within Renfrewshire: Abbotsinch Retail Park; Blythswood Retail Park; Braehead Retail Park; and Phoenix Retail Park with a total of 93,853 sqm of occupied retail floorspace. Since 2006 the retail parks, with the exception of Blythswood, have been performing well with little or no vacancies during this period.

Blythswood has performed badly during this period with high vacancy rates and little investment. In 2010, 74% of the 20,911 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 may require to be considered as an area for change in the Renfrewshire Local Development Plan, with a more flexible policy approach to allow a mix of uses in this area.

Retail Consents

In total, proposed retail developments with detailed planning consent amounts to approximately 45,000sqm. 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 Parks.

Summary

Most town and village 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 is likely to be significant implications for the future patterns of retailing, particularly in Paisley Town Centre, where the amount of vacant retail floorspace continues to increase. In response, co-ordinated action needs to continue to improve the market offering, profile and physical fabric of the town centre

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.

Braehead has continued to strengthen its position as a regional retail 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.

Appendix 1

Renfrewshire Council Shopping database classification system:

Class 0: Vacant

Class 1: Convenience (non-specialised stores with food, alcoholic drink, beverages, tobacco or newspapers and magazines predominating).

Class2: Comparison (books, clothing, footwear, furniture, floor coverings and household textiles, radio and electrical and other durable goods, hardware and DIY supplies, chemist's goods, jewellery, recreational and other miscellaneous goods).

Class 3: Hot Food/Restaurant/Pub/Café

Class 4: Office (Post office, Estate Agent, Bank, Solicitor, Job Centre, Citizens Advice, Travel Agent, Financial Services, etc)

Class 5: Other Services (Hairdresser, Drycleaner, Joiner, Glazier, Plumber, Photographer, etc)

Class 6: Car Sales

Class 7: Medical Services

Class 8: Bookmaker

Class 9: Entertainment (Bingo, Amusements, etc

Class 10: Retail warehouses

Class 11: Garden Centres