

Local Development Plan 2 Monitoring Statement

**October
2019**

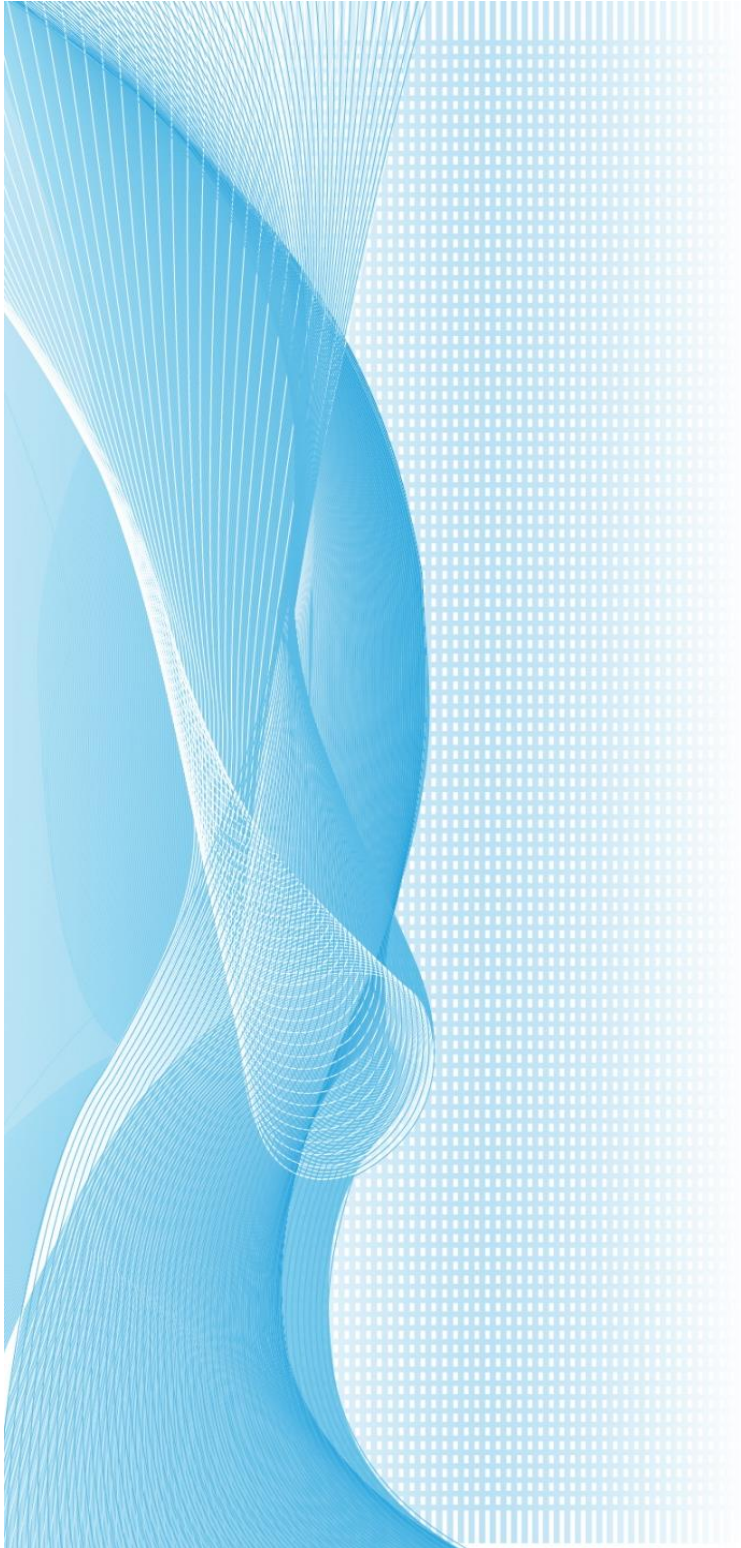
Appendix 6 - Retail Capacity Assessment



sustainable thriving achieving

East Dunbartonshire Council

www.eastdunbarton.gov.uk



Contents

| | | |
|------|--|----|
| 1 | Introduction | 1 |
| 1.1 | The consultants..... | 1 |
| 1.2 | Purpose and requirements | 1 |
| 2 | Retail catchment areas and population | 2 |
| 2.1 | Sub area retail catchments..... | 2 |
| 2.2 | Population projections | 2 |
| 3 | Planning and economic development: policy framework..... | 4 |
| 3.1 | Introduction | 4 |
| 3.2 | Scottish Planning Policy | 4 |
| 3.3 | Reforming the planning system | 4 |
| 3.4 | Clydeplan..... | 4 |
| 3.6 | Local Development Plan 2..... | 6 |
| 4 | National trends in retailing | 7 |
| 4.1 | Introduction | 7 |
| 4.2 | Retail and leisure spending | 7 |
| 4.3 | Economy and retail sales | 7 |
| 4.4 | Trends in retail expenditure | 7 |
| 4.5 | Market trends | 8 |
| 5 | Retail and leisure market in East Dunbartonshire..... | 10 |
| 5.1 | Introduction | 10 |
| 5.2 | Retail market context..... | 10 |
| 5.3 | Town centre floorspace | 10 |
| 5.4 | Vacancy rates | 10 |
| 5.5 | Multiple retailer representation | 14 |
| 5.6 | Bearsden retail market | 14 |
| 5.7 | Milngavie market..... | 15 |
| 5.8 | Bishopbriggs market | 15 |
| 5.9 | Kirkintilloch market..... | 16 |
| 5.10 | Northern Villages market..... | 17 |
| 5.11 | Strathkelvin Retail Park | 17 |
| 5.12 | Cinema development market- E Dunbartonshire..... | 17 |
| 5.13 | Summary | 18 |
| 6 | Town centre health checks | 19 |
| 6.1 | Introduction | 19 |
| 6.2 | Key indicators | 19 |
| 6.3 | Bearsden Town Centre health check..... | 21 |
| 6.4 | Milngavie Town Centre health check | 25 |
| 6.5 | Bishopbriggs Town Centre health check..... | 28 |

| | | |
|------|--|----|
| 6.6 | Kirkintilloch Town Centre health check | 31 |
| 7 | Convenience expenditure and turnover..... | 36 |
| 7.1 | Introduction..... | 36 |
| 7.2 | Convenience goods- definition | 36 |
| 7.3 | Convenience expenditure potential..... | 36 |
| 7.4 | Convenience shopping patterns-market shares | 36 |
| 7.5 | Convenience expenditure and turnover by catchment area | 39 |
| 7.6 | New store developments | 39 |
| 7.7 | Convenience expenditure and turnover in 2019..... | 39 |
| 7.8 | Convenience planning consents & opportunities..... | 42 |
| 8 | Convenience expenditure capacity | 44 |
| 8.1 | Introduction | 44 |
| 8.2 | Definition..... | 44 |
| 8.3 | Spare convenience expenditure capacity..... | 44 |
| 9 | Comparison expenditure and turnover | 46 |
| 9.1 | Introduction..... | 46 |
| 9.2 | Comparison goods- definition..... | 46 |
| 9.3 | Comparison expenditure potential and the internet | 46 |
| 9.4 | Comparison shopping patterns- market shares..... | 47 |
| 9.5 | Comparison expenditure and turnover by catchment area | 48 |
| 9.6 | New store developments and consents | 51 |
| 9.7 | Comparison floorspace and turnover 2019 | 51 |
| 10 | Comparison expenditure capacity | 54 |
| 10.1 | Introduction | 54 |
| 10.2 | Spare comparison expenditure capacity | 54 |
| 10.3 | Interpretation..... | 55 |
| 11 | Conclusions and recommendations | 58 |
| 11.1 | Introduction | 58 |
| 11.2 | Convenience expenditure trends- implications for LDP2 | 58 |
| 11.3 | Comparison expenditure trends- implications for LDP2..... | 58 |
| 11.4 | Bearsden town centre | 58 |
| 11.5 | Milngavie town centre..... | 59 |
| 11.6 | Bishopbriggs town centre | 59 |
| 11.7 | Kirkintilloch town centre..... | 59 |
| 11.8 | Village and Local centres | 59 |
| 11.9 | Strathkelvin Retail Park..... | 59 |

Appendix 1 East Dunbartonshire catchment areas: postcode sectors

Appendix 2 Household survey 2014 -list of questions

Appendix 3 Convenience expenditure inflows and outflows from the 2014 household survey

Appendix 4 Convenience expenditure inflows to East Dunbartonshire from the 2012 NSLSP survey

Appendix 5 Convenience trade diversion to new stores in Milngavie and Kirkintilloch since 2014- effect on shopping patterns

Appendix 6 Comparison expenditure inflows and outflows from the 2014 household survey

Appendix 7 Comparison expenditure inflows to East Dunbartonshire from the 2012 NSLSP survey

Appendix 8 Comparison trade diversion to new stores in Milngavie and Kirkintilloch since 2014- effect on shopping patterns

Appendix 9 Strathkelvin Retail Park- list of retailers

Appendix 10 Comparison capacity forecasts- low estimate

1 Introduction

1.1 The consultants

1.1.1 In December 2018, *Roderick MacLean Associates Ltd*, with *Ryden LLP* as sub consultants, were appointed by East Dunbartonshire Council to prepare a retail capacity assessment for the Council area and health checks for Bearsden, Milngavie, Bishopbriggs and Kirkintilloch town centres.

1.2 Purpose and requirements

1.2.1 In accordance with the consultants' brief, the main purpose of the research is to provide evidence on retail trends and retail capacity, including selected town centre health checks, to inform the forthcoming East Dunbartonshire Local Development Plan 2.

1.2.2 The study requirements are set out in the consultants' brief, under Objectives A, B and C. We interpret the scope of the requirements as follows:

1.2.3 **Objective A:** to provide information on retail trends, including market trends, at different levels. The study must identify trends at national and local levels, including for East Dunbartonshire in its context within the Clydeplan area.

1.2.4 The identification and analysis of retail trends is required to inform emerging policy development in support of the network of centres. Mostly, advice is sought on how retail and commercial trends are affecting the four main town centres.

1.2.5 **Objective B:** to conduct an up-to-date survey of records of retail and non-retail service floorspace in the Council area, including vacancies, to provide information on the diversity of floorspace uses in the four main town centres, the local/village centres and identification of other out of centre shops, plus occupiers in the only commercial centre (Strathkelvin Retail Park).

1.2.6 Standard town centre health checks, based on the list of performance indicators in the SPP, are to be applied to the four main town centres. Commentary is included on any emerging issues among the

local/ village centres from the floorspace surveys and other evidence. Specifically, the Council seeks advice on what are the most likely opportunities for reinforcing the town centres and the network of centres to promote their future development.

1.2.7 **Objective C:** to provide an updated retail expenditure capacity study for East Dunbartonshire for the convenience and comparison sectors, with forecasts of capacity over the next five and ten years. In this study, we provide forecasts of spare retail expenditure capacity for 2019-24 and for 2025-29 and combined for 2019-29. All values are expressed in constant 2018 prices.

1.2.8 The implications for supporting further retail development in the Council area are required by the brief, together with advice on how best to promote strengthening of the town centres, and the rest of the network of centres. The retail capacity study will contribute to consideration of future retail opportunities in the town centres alongside the health check findings.

2 Retail catchment areas and population

2.1 Sub area retail catchments

2.1.1 The study references the same five zones for retail analysis, as in the 2014 Retail Capacity Assessment. They relate to the household interview survey findings underpinning the 2014 Study.

2.1.2 The five zones include Bearsden, Milngavie, Bishopbriggs, Kirkintilloch and the Northern Villages, as illustrated on Map 2.1. The postcode sectors comprising the zones are shown in Appendix 1. Each of the zones represents the primary *convenience catchment area* of the main towns after which they are named. The Northern Villages represents the combined catchment of Lennoxton, Milton of Campsie and Torrance.

2.1.3 There are two *comparison catchment areas* defined in East Dunbartonshire: Bearsden & Milngavie (Zones 1 & 2 combined) and Bishopbriggs, Kirkintilloch & Northern Villages.

2.2 Population projections

2.2.1 The current and projected populations of East Dunbartonshire and the catchment areas in 2019, 2024 and 2029 are shown in Tables 2.1 and 2.2. The projections are based on the 2016 based population projections for the Council area, from National Records Scotland (NRS), with apportionment to the catchment areas.

2.2.2 There is a projected increase in the Council area population of just over 5,100 from 2019-29 (+4.7%).

Table 2.1
East Dunbartonshire convenience retail catchment areas (zones)- population projections

| | 2011 Census | 2019 | 2024 | 2029 |
|-----------------------------------|----------------|----------------|----------------|----------------|
| Zone 1 Bearsden | 27,237 | 28,275 | 28,938 | 29,598 |
| Zone 2 Milngavie | 13,565 | 14,082 | 14,412 | 14,741 |
| Zone 3 Bishopbriggs | 22,953 | 23,828 | 24,387 | 24,943 |
| Zone 4 Kirkintilloch | 29,569 | 30,696 | 31,416 | 32,132 |
| Zone 5 Northern Villages | 11,702 | 12,148 | 12,433 | 12,716 |
| East Dunbartonshire -total | 105,026 | 109,028 | 111,586 | 114,131 |

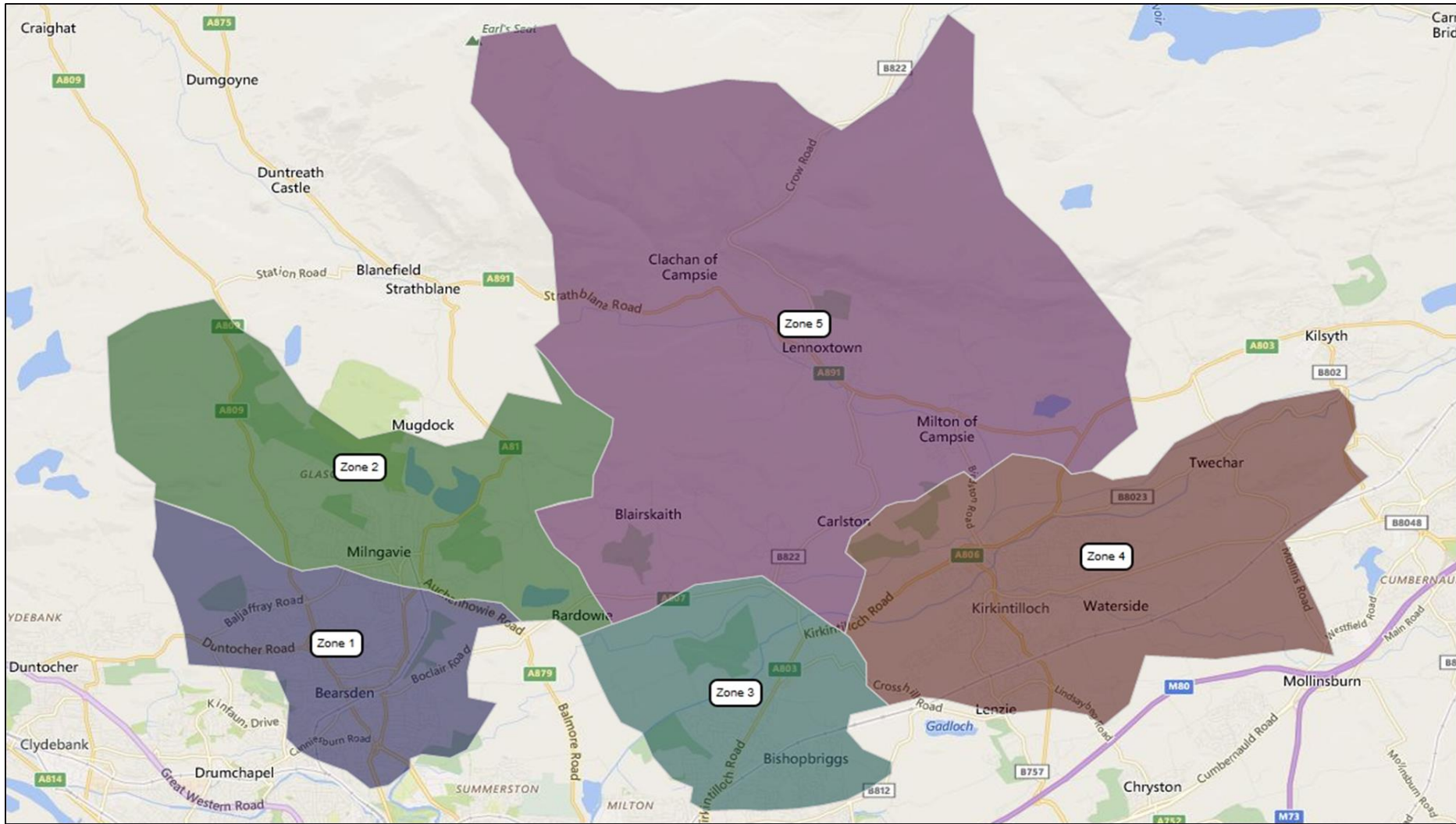
Note

The zones comprise groups of postcode sectors-see Appendix 1. The zones are the same as applied in the 2014 Retail Capacity Study. The forecasts to 2019, 2024 and 2029 derive from the National Records Scotland (NRS) 2016 based population projections for East Dunbartonshire, apportioned to the zones.

Table 2.2
East Dunbartonshire comparison retail catchment areas - population projections

| | 2011 Census | 2019 | 2024 | 2029 |
|--|----------------|----------------|----------------|----------------|
| Bearsden & Milngavie (Zones 1 & 2) | 40,802 | 42,357 | 43,351 | 44,339 |
| Bishopbriggs/ Kirkintilloch/ N Villages (Zones 3,4 & 5) | 64,224 | 66,671 | 68,235 | 69,792 |
| East Dunbartonshire -total | 105,026 | 109,028 | 111,586 | 114,131 |

Map 2.1 The five convenience catchment areas in East Dunbartonshire -see Tables 2.1 & 2.2



3 Planning and economic development: policy framework

3.1 Introduction

3.1.1 This section provides a summary of the current and emerging planning policy framework in East Dunbartonshire, as it relates to town centres and retailing.

3.2 Scottish Planning Policy

3.2.1 The SPP was published in June 2014. It has a strong focus on encouraging the diversity of uses and vitality within town centres generally, alongside support for improvement to the quality of the centres as places to live and work.

3.2.2 Preparation of the 2014 SPP was undertaken in parallel with the External Advisory Group's Report to the Scottish Government entitled *Community and Enterprise in Scotland's Town Centres*, published in June 2013. This document sets out a 'town centres first' principle, where the health of town centres is given central focus. A list of health check indicators is contained in Appendix A of the 2014 SPP. Also, a detailed methodology on application of performance indicators is set out in the USP (*Understanding Scottish Places*) Town Audit 2015.

3.2.3 The 'town centres first' policy is promoted in the 2014 SPP, when planning for uses which attract significant numbers of people, including retail, commercial and leisure uses, offices, community and cultural facilities. Plans should identify a network of centres (city centres, town centres, local centres and commercial centres), explaining how they interrelate. For commercial centres, the function should be specified to protect town centres. Health checks of town centres should be undertaken regularly to assess their vitality and viability and strengths/ weaknesses. These checks should be used to develop town centre strategies.

3.2.4 Development plans should adopt the sequential approach to preferred locations for uses which generate significant footfall, including retailing and other uses, in the following order of preference:

- Town centres
- Edge of town centres
- Other commercial centres
- Out of centre locations that are readily accessible by a choice of transport.

3.2.5 All parties are advised to be realistic and flexible in applying the sequential test. New development in a town centre should contribute to diversity and be of a scale appropriate to that centre. A retail impact analysis is required for retail and leisure developments over 2,500 sq m gross which are contrary to the development plan. For smaller developments which affect vitality and viability, an impact analysis may also be required.

3.2.6 Out of centre locations should only be considered where the town centre/ edge of centre and commercial centre options are unavailable or do not exist, together with meeting other criteria specified in the SPP.

3.3 Reforming the planning system

3.3.1 The Planning Scotland Bill was introduced to Parliament in December 2017. It includes measures intended to strengthen the planning system's contribution to inclusive growth and empowering communities. At the date of publication this Report, it is unclear what the details of the likely final Act will be.

3.4 Clydeplan

3.4.1 The current Clydeplan was approved by the Scottish Ministers in July 2017. In the Clydeplan, there are 23 '*Strategic Centres*', including Glasgow City Centre at the apex within the network of centres. Kirkintilloch is the only strategic centre in East Dunbartonshire. Its role is for retail, cultural, civic and community uses.

3.4.2 Bearsden, Milngavie and Bishopbriggs are identified as ‘Town Centres’ in the Clydeplan. These are shown in Schedule 2 of the Plan. Maps of all four town centres are provided in section 6 under the Health Checks.

3.4.3 Under *Policy 4* in the Clydeplan, Strategic Centres are defined as the hubs of the city region’s communities, supporting a range of economic and social activities. To support the Vision and Spatial Development Strategy, all development proposals should:

- Protect and enhance the network of centres in line with their role and function
- Protect and enhance the long-term health of Glasgow City Centre
- Assess (retail and leisure) development proposals against the sequential test in respect of the network of centres and their impact on it.

3.4.4 Schedule 2 of the Clydeplan, provides a summary of the challenges and future actions for Kirkintilloch. An extract is shown below.

| Kirkintilloch Challenges | Actions |
|--|--|
| <ul style="list-style-type: none"> • reduction in the quantity and quality of retail offer and competition from larger retail locations; • lack of evening activity; • lack of direct access by rail; • priority imbalance between pedestrians and traffic; • better integration between the Cowgate with Townhead areas; • parts of the area subject to flood risk. | <ul style="list-style-type: none"> • continued improvements to public realm through the ongoing masterplan; • improved linkages with the Forth and Clyde Canal and Antonine Wall to better exploit the visitor economy potential of the town; • modernise the core retail area at Cowgate to retain vitality and enhance the town centre. |

3.5 Local Development Plan

3.5.1 The current local development plan (LDP) for East Dunbartonshire was approved in 2017.

3.5.2 *Policy 11 Network of Centres* identifies the network to include the four main town centres, Strathkelvin Retail Park as the only commercial centre and the village and local centres.

3.5.3 Under *the town centres first* principle, the four town centres are to be the focus for new retail, commercial, community, cultural and employment uses. The Council supports developments that contribute to the vitality and viability of the town centres, including evening activities.

3.5.4 In the LDP, the role of Bearsden, Milngavie and Bishopbriggs is to provide a mix of retail, commercial, leisure and community uses to primarily serve their surrounding catchment residents in the network of centres.

Milngavie is also identified as a gateway to Loch Lomond and the Trossachs.

3.5.5 The LDP identifies Kirkintilloch as the only strategic centre in East Dunbartonshire, with an important civic function covering the whole of the Council area. It is the largest of the four town centres in terms of both area and number of units.

3.5.6 All development proposals in the network of centres are expected to contribute towards supporting a strong sense of place under the place-making principles in Policy 2. These should include consideration of developer contributions under Policy 20.

3.5.7 The LDP supports the preparation of town centre strategies and provides supplementary guidance on spatial aspects to improve the town centres.

3.5.8 Strathkelvin Retail Park is safeguarded for comparison retailing, with a presumption against new convenience retailing. Any new retail development proposals in the Retail Park should not adversely impact on the town centres of Bishopbriggs and Kirkintilloch.

3.5.9 Lists of the village and local centres are contained in the LDP under the Community

Strategies section. The LDP seeks to protect their role and local function and recognises that some residents depend on these services.

3.5.10 *Policy 12 Retail and Commercial Development* - the LDP recognises the importance of retail and commercial development as a key contributor to employment and town centre vitality. The LDP re-iterates the provisions of the sequential test in the SPP, and the same selective requirements for retail impact assessments.

3.6 Local Development Plan 2

3.6.1 Work has commenced on preparation of the next LDP to replace the current Plan. Initial public consultation and early engagement was carried out between December 2018 and February 2019. A main issues report is expected to be published in Autumn 2019.

4 National trends in retailing

4.1 Introduction

4.1.1 This section summarises the national trends in retailing which drive the market and form the context for assessment of the local market in East Dunbartonshire in terms of constraints and opportunities.

4.2 Retail and leisure spending

4.2.1 Analysis of the Office of National Statistics (ONS) data for the UK reveals that 46% of ¹household expenditure is on shopping and leisure. The latter category includes restaurants, pubs, cafes, hotels recreation and culture. Of the 46%, some 24% is on shopping and 22% is broadly on leisure. Both these categories are of major importance to town centres, which is reflected in the mix of uses present in any healthy town centre.

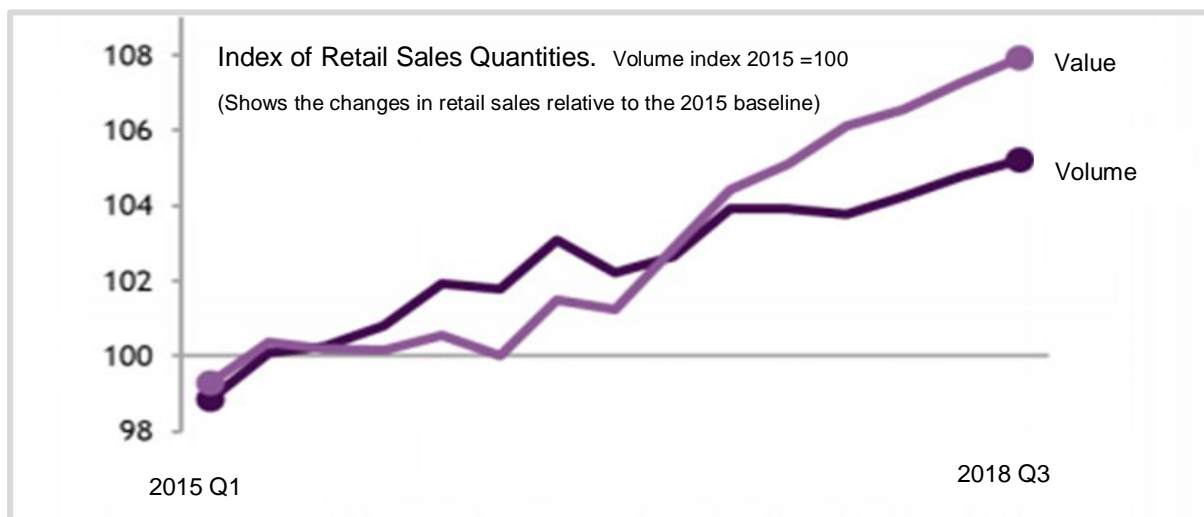
4.3 Economy and retail sales

4.3.1 The Scottish economy grew by 1.7% between 2017 (Q2) and 2018 (Q2), compared to 1.2% for the UK. Anxiety over the outcome of Brexit negotiations is affecting business confidence generally, including investment in retail and commercial property.

4.3.2 Consumer expenditure on retail goods in Scotland has grown modestly since 2015 (Figure 4.1). Sales value grew by 0.6% between Q2 and Q3 2018. The equivalent figure for Great Britain was 1.7%. As shown on the chart, the volume of sales has been growing more slowly than the value, reflecting price inflation. The slow sales volume growth has added to retailer challenges as they face property, staff and supply chain cost pressures.

Figure 4.1 Scottish economy: retail sales growth

Source- Scottish Government



4.4 Trends in retail expenditure

4.4.1 There is a large difference between the forecast growth in convenience retail expenditure and comparison retail expenditure over the next ten years. The forecasts for East

Dunbartonshire in this report are based on UK trends, adapted by Pitney Bowes (Oxford Economics) in their forecasts for the Council area.

¹ ONS: Family Spending in the UK, Financial Year ending March 2018

4.4.2 As mentioned later in the report, the forecast growth in expenditure per capita on *convenience* goods by Pitney Bowes is minimal at only 0.56% per annum to 2029 in East Dunbartonshire. Whereas the forecast growth rate for expenditure per capita on *comparison* goods is 3.11% per annum- nearly six times higher. So, the case for more convenience floorspace is mostly about improved choice.

4.5 Market trends

4.5.1 **Concentration into the largest centres-** the retail property market is increasingly concentrating on large cities, destination shopping malls, and retail parks. Long-run evidence shows that consumers are willing to travel for an increased range of goods and services. Retailers, leisure operators and service providers are investing in those dominant centres and disinvesting from many smaller centres.

4.5.2 Glasgow City Centre and the shopping centres at Silverburn, Braehead and the Fort are the principal attractions (dominant centres) in the Clydeplan area. The four small town centres in East Dunbartonshire are among those which are fully exposed to this trend towards concentration.

4.5.3 The continuing closures of multiple retailers in medium and small towns, generally, is further focusing the market on the high-demand locations. The concentration of demand into fewer locations affects retail property rents, which are static in most locations. In turn, developers and investors are targeting locations which can support national retailers, often in purpose-built premises, on long leases, with the prospect of rising rents.

4.5.4 Many old, purpose-built shopping centres in middle-sized towns are extremely vulnerable to these changes in the market, with increasing levels of vacancies.

4.5.5 The most notable closure programmes are among banks, travel agents, variety stores, department stores and estate agents, where sales and services are migrating online and portfolios (and sometimes store buildings) may simply be too large for the emerging market.

4.5.6 **Growth in on-line retailing-** household surveys indicate that the proportion

of retail spending on comparison goods by internet is currently around 25% and more in different areas of the country. The process is hastening the end of many shops in the high streets. Growth in on-line retailing (and services) has also radically changed the service sector, with the closure of most bank branches in town centres as an example.

4.5.7 The rate of shop closures has been given increased coverage in the Press, combined with a widespread perception that there are now probably too many shops which are not of a quality or offer to maintain customer attraction, compared to the past.

4.5.8 **Diversification away from shopping-** in part this is a response to the above two challenges. It is also a trend in its own right as landlords and developers seek, initially, alternative sources of spending and footfall through introducing leisure (cafes, bars, restaurants, cinemas), then other active uses such as hotels, offices and potentially residential development. Diversification is also evident within superstores as they seek alternative uses within their units for example.

4.5.9 **Expansionary retailers-** in the current market, these are the discount foodstore sector (Lidl and Aldi for example), budget mixed goods retailing (B&M and Home Bargains), pharmacies, fast food and coffee sectors. There is some resurgence in mid-market activity as consumer expenditure on household goods increases, in sectors such as furniture, furnishings and kitchens. The pet sector is also buoyant. This is driving renewed retailer activity which is benefiting mainly modern, purpose-built retail locations, not traditional town centres.

4.5.10 **Retail parks-** market interest is mostly in the form of developers and operators seeking relaxation of restrictions on the ranges of goods that can be sold and reconfiguration of existing space to target more buoyant market sectors; not demand for additional retail parks.

4.5.11 **Grocery sector,** market interest in developing large supermarkets has expired, with the current focus on discount foodstores and small convenience stores continuing. Lifestyles are changing, with more people wanting to shop locally and very frequently, while wanting good quality and value for money.

The discount foodstores have made huge inroads on the business of the large supermarket operators. Nevertheless, the major supermarket operators have still successfully attracted a lot of trade with their small 'local' convenience store formats.

4.5.12 **Leisure uses-** the most active players in the commercial sector have been leisure uses. Restaurants, bars, cafes, cinemas, and hotels are complementary to retailing. In small and medium sized towns, the main interest has been in restaurants and cafes, often replacing former retail occupiers.

4.5.13 Nevertheless, there is now evidence of market saturation within the restaurant/ café/ take-away sector, with closures of mid-market chains and the short life-span of many individual restaurants. Changing life-styles include more people choosing to eat at home rather than going out, compared to the recent past.

4.5.14 The number of traditional pubs has declined substantially in recent years. This may of course change, as the sector will probably re-invent itself to attract a broader range of customers. So, there are positive aspects for the future small towns in this area of the service sector, providing effort is put in. Household surveys in Scotland in areas away from the cities show that the predominant reason for visiting their local town centre in the evenings is to eat out and for pub/ wine bar visits.

4.5.15 Personal services, including beauty and healthcare have proved enduring in town centres in recent years. On the other hand, the closures of banks in the high streets has been extreme over the last two years.

4.5.16 The next section looks at the local retail and service market in the town centres in East Dunbartonshire, including consideration of their proximity to Glasgow.

5 Retail and leisure market in East Dunbartonshire

5.1 Introduction

5.1.1 This section of the report contains a review of the retail market in East Dunbartonshire, including the towns of Bearsden, Milngavie, Bishopbriggs and Kirkintilloch, plus the local/ village centres and Strathkelvin Retail Park.

5.2 Retail market context

5.2.1 East Dunbartonshire is part of the extensive catchment area of Glasgow City Centre, both for shopping and leisure. While most convenience retail expenditure by residents of East Dunbartonshire is retained in the Council area (Table 7.3), there is a high level of outflow of comparison expenditure, mainly to Glasgow (Table 9.3 and graphs in section 9). Strathkelvin Retail Park is the largest retainer of comparison expenditure in the Council area.

5.2.2 The four town centres in East Dunbartonshire are very small compared to the City Centre and other shopping centres in and around Glasgow. Given the proximity of Glasgow, the local retail market in the four town centres is limited and it is likely to remain fairly static at best, for comparison shopping in the future.

5.3 Town centre floorspace

5.3.1 Prior to our market commentary, the level and diversity of floorspace in the main town centres and local centres is shown in Table 5.1 at a broad level, distinguishing retail from other uses. The importance of non-retail service uses in town centres is revealed. In some cases, no floorspace records accompanied some properties although the unit numbers and occupiers/ vacant units were fully recorded.

5.3.2 The changes in retail floorspace only, since the 2014 Retail Capacity Assessment (based on 2012 floorspace data) are also shown in Table 5.2. There has been a slight decline in town centre retail floorspace in Milngavie, but more so in Kirkintilloch. Retail floorspace has increased in Lenzie and contracted in Lennoxton.

5.3.3 The changes shown in Table 5.2 for the local/ village centres should be treated with caution, as it is likely that not all retail units were recorded in 2012. There were insufficient records available in 2012 to reasonably compare the changes for non-retail uses and vacant floorspace in the centres in 2019.

5.3.4 The associated proportions by type of use in 2019 are illustrated by the pie chart graphs following Table 5.2. It is recommended that these graphs are studied, as they provide an instant impression instead of lengthy text. Non-retail services are the largest occupiers of floorspace in the town centres, apart from in Milngavie and the village of Twechar. In fact, there are a few community and miscellaneous services in Twechar, but no floorspace records. This is also the same for leisure uses in Bearsden.

5.3.5 Comparison floorspace is a significant proportion of the totals in Milngavie and Kirkintilloch, and in Twechar and Torrance. The proportion of convenience floorspace is significant in Milngavie and Bishopbriggs town centres, and also in Lenzie and Milton of Campsie.

5.3.6 Table 5.3 shows a further breakdown of the other occupied floorspace by types of use, divided into six categories, including leisure-related uses.

5.3.7 Among the four town centres, Bearsden has the highest proportion of floorspace relating to restaurants, pubs and cafes. Property/offices and professional services is an important category in all four town centres. Milngavie has a significant proportion of floorspace for financial services compared to the other town centres. Otherwise, there is a general spread of service categories.

5.3.8 Further analysis is provided in section 6 (health checks).

5.4 Vacancy rates

5.4.1 The vacant units in the town centres and local centres are shown in Table 5.4. Apart from Kirkintilloch town centre, these

Table 5.1
East Dunbartonshire Town Centres and Local and Village Centres: occupied and vacant floorspace - summary 2019

| | Convenience floorspace | | Comparison floorspace | | Other occupied floorspace | | Vacant floorspace | | Total |
|------------------------------------|------------------------|------------|-----------------------|------------|---------------------------|------------|-------------------|------------|------------|
| | sq m gross | % of total | sq m gross | % of total | sq m gross | % of total | sq m gross | % of total | sq m gross |
| Town Centres | | | | | | | | | |
| Bearsden | 1,074 | 15% | 1,093 | 15% | 4,043 | 57% | 849 | 12% | 7,059 |
| Milngavie | 6,158 | 33% | 6,010 | 33% | 5,678 | 31% | 543 | 3% | 18,390 |
| Bishopbriggs | 3,717 | 32% | 1,770 | 15% | 5,082 | 44% | 917 | 8% | 11,485 |
| Kirkintilloch | 7,143 | 19% | 10,907 | 30% | 15,394 | 42% | 3,315 | 9% | 36,758 |
| Local & Village Centres | | | | | | | | | |
| Lenzie- Local Centre | 1,358 | 41% | 165 | 5% | 1,614 | 49% | 182 | 5% | 3,320 |
| Twechar- Village Centre | 131 | 23% | 438 | 77% | 0 | 0% | 0 | 0% | 569 |
| Lennoxtown- Village Centre | 584 | 22% | 276 | 10% | 1,594 | 59% | 242 | 9% | 2,696 |
| Milton of Campsie- Village Centre | 412 | 41% | 161 | 16% | 423 | 42% | 0 | 0% | 995 |
| Torrance- Village Centre | 669 | 55% | 209 | 17% | 334 | 28% | 0 | 0% | 1,212 |

Note

Based on data from the Assessors' records for 2019, updated from the older records held by the Council to cover the defined town centres, including street surveys. Some records of floorspace were incomplete.

Vacant floorspace includes retail and non-retail units

Table 5.2**East Dunbartonshire Town Centres and Local Centres and Village Centres: retail floorspace only - change 2012-19**

| | Convenience floorspace | | % change | Comparison floorspace | | % change | Total retail floorspace | | % change |
|------------------------------------|------------------------|--------------------|-------------|-----------------------|--------------------|-------------|-------------------------|--------------------|-------------|
| | 2012 sq m gross | 2019 sq m gross | | 2012 sq m gross | 2019 sq m gross | | 2012 sq m gross | 2019 sq m gross | |
| Town Centres | | | | | | | | | |
| Bearsden | 885 | 1,074 | 21% | 1,110 | 1,093 | -2% | 1,995 | 2,167 | 9% |
| Milngavie | 7,112 | 6,158 | -13% | 5,211 | 6,010 | 15% | 12,323 | 12,169 | -1% |
| Bishopbriggs | 3,722 | 3,717 | 0% | 1,423 | 1,770 | 24% | 5,145 | 5,487 | 7% |
| Kirkintilloch | 7,402 | 7,143 | -3% | 12,989 | 10,907 | -16% | 20,391 | 18,050 | -11% |
| | | | | | | | | | |
| Local & Village Centres | | | | | | | | | |
| Lenzie- Local Centre | 1,036 | 1,358 | 31% | 201 | 165 | -18% | 1,237 | 1,523 | 23% |
| Twechar- Village Centre | | 131 | | | 438 | | | 569 | |
| Lennoxtown- Village Centre | 1,165 | 584 | -50% | 203 | 276 | 36% | 1,368 | 860 | -37% |
| Milton of Campsie- Village Centre | | 412 | | | 161 | | | 573 | |
| *Torrance- Village Centre | | 669 | | | 209 | | | 878 | |

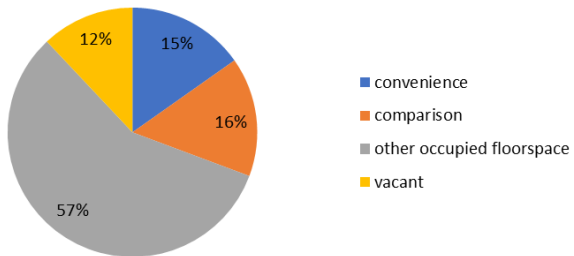
Note

Based on data from the Assessors' records for 2019, updated from the older records held by the Council to cover the defined town centres, compared with retail floorspace in the 2014 Capacity Assessment, which was based on 2012 records from the Assessor. It is likely that some retail units were not recorded in 2012 in the Council-held data (mostly in local centres), so the changes should be interpreted with caution.

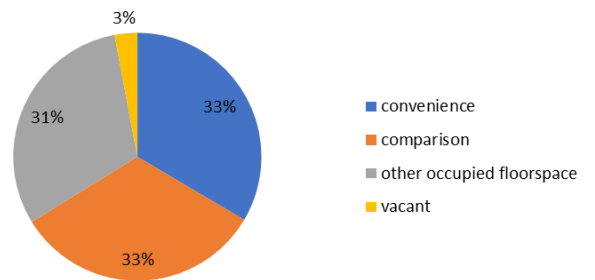
* The floorspace in these centres is so small that recording of change has limited significance, especially if some units were not recorded in 2012.

Limited complete data records were available for other occupied floorspace and vacant units in 2012 in the town centres and local centres, so they cannot readily be compared with the 2019 data.

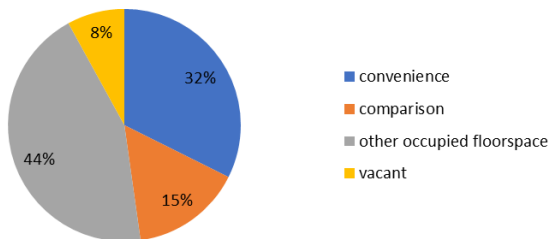
Bearsden Town Centre: distribution of floorspace by type 2019



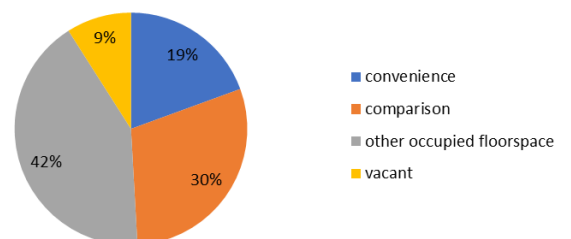
Milngavie Town Centre: distribution of floorspace by type 2019



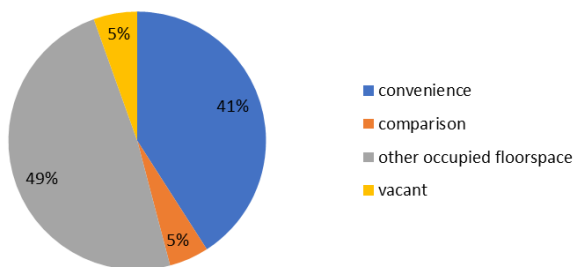
Bishopbriggs Town Centre: distribution of floorspace by type 2019



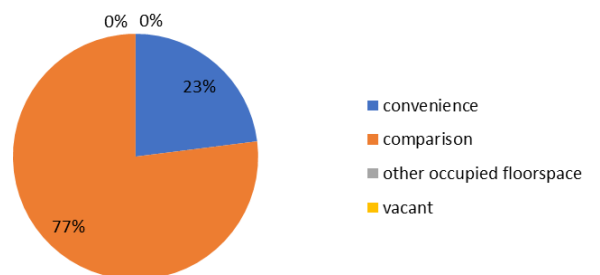
Kirkintilloch Town Centre: distribution of floorspace by type 2019



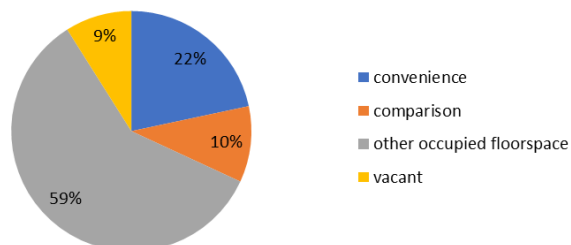
Lenzie Local Centre: distribution of floorspace by type 2019



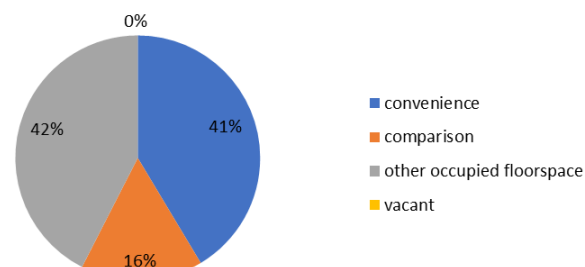
Twechar Village Centre: distribution of floorspace by type 2019



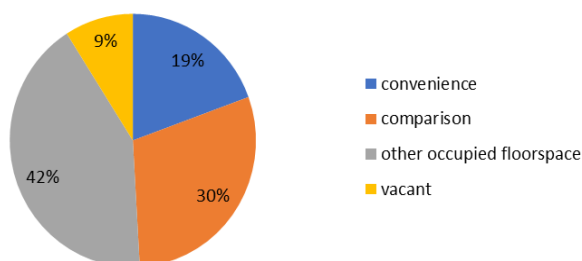
Lennoxtown Village Centre: distribution of floorspace by type 2019



Milton of Campsie Village Centre: distribution of floorspace by type 2019



Torrance Village Centre: distribution of floorspace by type 2019



vacancy rates are mainly low. Looking at the numbers of vacant units, rather than floorspace, presents a more accurate assessment, as some records of vacant floorspace are missing. It is particularly relevant to Kirkintilloch which has 36 vacant units. They are mostly vacant shop units in Cowgate and in the Regent Centre and also vacant office units in Townhead.

5.4.2 The average town centre vacancy rate in Scotland was around 12% in January 2019, compared to the UK average of 9.9% (Scottish Retail Consortium).

5.5 Multiple retailer representation

5.5.1 The proportion of multiple retailer representation in any town centre is a measure of strength in terms of investment and retail offer. Table 5.5 shows the proportions of multiple retailer representation in the four main towns. Multiple representation is good in

Bishopbriggs and Kirkintilloch for towns of their size. It is relatively weak in Bearsden. Definition of multiple retailer representation is provided in the footnote to that table.

5.6 Bearsden retail market

5.6.1 Bearsden town centre has five multiple retailers representing 20% of the total retail units, with the rest being independent retailers- Table 5.5. Thus, multiple retailer representation, is limited. The multiple retailers include *M&S Simply Food*, *RS McCall's*, *Greggs*, *Timpson* and *Optical Express*. The vacancy rate is 10%. It is the smallest of the four town centres in East Dunbartonshire

5.6.2 Supermarket provision outside the town centre includes ASDA on Milngavie Road, Lidl at Baljaffray Shopping Centre, Sainsbury's Local and Co-op Food Store on Station Road, among other stores.

Table 5.3
Distribution of other occupied floorspace (non- retail) in the town centres by type of use 2019

| Other occupied town centre floorspace | | Bearsden TC | | Milngavie TC | |
|---------------------------------------|--|-------------|------|--------------|------|
| Type | | sq m gross | | sq m gross | |
| 3 | Restaurants/ cafes/pubs/take-aways | 1,356 | 34% | 1,203 | 21% |
| 4 | Personal services- beauty, hairdressers etc | 322 | 8% | 931 | 16% |
| 5 | Financial services- banks, building soc, insurance etc | 656 | 16% | 1,131 | 20% |
| 6 | Property/ offices/professional services | 972 | 24% | 1,255 | 22% |
| 7 | Leisure, gaming/halls, libraries etc | 0 | 0% | 479 | 8% |
| 8 | Public services/ miscellaneous | 736 | 18% | 677 | 12% |
| | Total | 4,043 | 100% | 5,678 | 100% |

| Other occupied town centre floorspace | | Bishopbriggs TC | | Kirkintilloch TC | |
|---------------------------------------|--|-----------------|------|------------------|------|
| Type | | sq m gross | | sq m gross | |
| 3 | Restaurants/ cafes/pubs/take-aways | 945 | 19% | 2,666 | 17% |
| 4 | Personal services- beauty, hairdressers etc | 455 | 9% | 2,468 | 16% |
| 5 | Financial services- banks, building soc, insurance etc | 454 | 9% | 2,325 | 15% |
| 6 | Property/ offices/professional services | 2,344 | 46% | 4,328 | 28% |
| 7 | Leisure, gaming/halls, libraries etc | 307 | 6% | 713 | 5% |
| 8 | Public services/ miscellaneous | 577 | 11% | 2,893 | 19% |
| | Total | 5,082 | 100% | 15,394 | 100% |

Note Type Codes 1 and 2 are convenience and comparison retail floorspace respectively. Code 9 is vacant floorspace
Where 0 is shown under the floorspace, it usually means no record of floor area, but often there is a record of the unit numbers

5.6.3 There is currently only one retail unit available to rent in Bearsden town centre totalling 107 sq m (1,152 sq.ft). Current Zone A rents are around £280 per sq m (£26 per sq ft) generally. Yields are 8%-10%.

5.6.4 The only recorded requirement for Bearsden at present is Aldi, but this may have been fulfilled with the new Milngavie store, which will open shortly.

5.7 Milngavie market

5.7.1 Milngavie town centre contains a mix of national retailers alongside a wide range of independent retailers. Multiple retailer representation is 31%- Table 5.5. The vacancy rate is low at 4%.

5.7.2 In the convenience sector, multiple retailers in the town centre include *Tesco*, *M&S*, *Simply Food*, *RS McColl's*, *Vapouriz*, *Greggs* and *Holland & Barrett*. In the comparison retail sector, multiple retailers in the town centre include *Boots*, *Black & Lizards*, *Gordon chemists*, *Original Factory Shop*, *Specsavers*, *Peacocks*, and *Timpson*.

5.7.3 Recent closures in Milngavie town centre include a branch of *Santander Bank* which closed in November 2018, *Johnson*

Cleaners and *Poundstretcher*. There are currently three retail properties available within Milngavie town centre. Current asking rents range £376- £484 per sq m (£35-£45 per sq.ft). Yields are 8%-10%.

5.7.4 Milngavie town centre has an equal split of comparison and convenience retailers, at 33% each. Outside the town centre, Waitrose has a store located on Glasgow Road. Aldi and Home Bargains will open shortly at West Retail Park, beside Waitrose.

5.8 Bishopbriggs market

5.8.1 Bishopbriggs town centre contains six multiple retailers alongside a range of independent shops serving mainly local people. It is the second smallest of the four town centres in East Dunbartonshire. Multiple retailer representation is good at 33%. The multiples include *Morrisons*, *Savers health & beauty*, *Specsavers*, *Timpson*, *Boots* and *Apollo Blinds*.

5.8.2 The vacancy rate is low at 7%. The majority of occupied floorspace within the town centre is for non-retail uses.

Table 5.4
East Dunbartonshire vacant units in the Town Centres and Local Centres - 2019

| | Vacant units | Total units | Vacancy rate % |
|------------------------------------|--------------|-------------|----------------|
| Town Centres | | | |
| Bearsden | 9 | 94 | 10% |
| Milngavie | 6 | 139 | 4% |
| Bishopbriggs | 6 | 87 | 7% |
| Kirkintilloch | 36 | 261 | 14% |
| Local & Village Centres | | | |
| Lenzie- Local Centre | 2 | 53 | 4% |
| Twechar- Village Centre | 0 | 13 | 0% |
| Lennoxtown- Village Centre | 6 | 62 | 10% |
| Milton of Campsie- Village Centre | 0 | 19 | 0% |
| Torrance- Village Centre | 0 | 20 | 0% |

Note: vacancy rate= vacant units/ (retail and non-retail service units & vacant units)
 Sources Assessors' records for 2019 and street surveys in the town centres

Table 5.5
Multiple retailer representation in East Dunbartonshire Town Centres - 2019

| | *Multiple retailers | Convenience and comparison shops | % multiple retailers |
|---------------------|---------------------|----------------------------------|----------------------|
| Town Centres | | | |
| Bearsden | 5 | 25 | 20% |
| Milngavie | 14 | 45 | 31% |
| Bishopbriggs | 6 | 18 | 33% |
| Kirkintilloch | 21 | 64 | 33% |

Note
 * refers to multiple retailers only, excluding multiple non-retail services. Includes national multiples and regional chains. A multiple is defined as a retailer with 9 or more outlets (Experian). Charity shops have not been classified as multiples here.

5.8.3 Closures within Bishopbriggs town centre include *Gregg's*, *TUI* and *Thomas Cook*. *Clydesdale Bank* and the *Royal Bank of Scotland* have both closed branches, the latter having just been sold.

5.8.4 Two retail units are currently available at 219 sq m (2,357 sq ft) which are being formally marketed at the Triangle Shopping Centre. In addition, the first-floor offices previously occupied by East Dunbartonshire Council are available and suitable for Class 3 Food and Drink use. Asking rents are in the range of £269 - 323 per sq.m. (£25 - £30 per sq.ft.). Yields are 8%-10%.

5.8.5 There has been a total of 21 retail units taken-up in Bishopbriggs since 2010, an average of two per year.

5.8.6 A planning application was received in March 2019 for redevelopment of the existing Morrisons superstore and car park to create a replacement store, car park, petrol

filling station, access, landscaping and associated works (TP/ED/19/0186) .

5.8.7 Strathkelvin Retail Park, around 1.6 miles from the town centre, provides large, modern retail units. There are 14 occupied non-food retail units (see Appendix 9), plus *M&S Simply Food*, and coffee/ fast food chains *Costa*, *Burger King* and *Tim Horton's*.

5.8.8 There are no known positive retail requirements for Bishopbriggs at present, although there are indications that Lidl may have a requirement, but no certainty. There is a requirement from *Marstons* for a pub/restaurant.

5.9 Kirkintilloch market

5.9.1 Kirkintilloch town centre is the largest of the four town centres in East Dunbartonshire, with a total retail and non-retail service floorspace of 33,443 sq.m. gross, excluding vacant units- Table 5.1.

5.9.2 Multiple retailer representation in the town centre is 33%- Table 5.5. In the convenience sector, the multiples include *Sainsbury's*, *Farmfoods*, *Tesco* (*Regent Centre*), *Greggs* and *Vapouriz*. Comparison goods multiple retailers include *Boots*, *Boots Opticians*, *Superdrug*, *New Look*, *M & Co*, *Specsavers*, *Pep & Co*, *Optical Express*, *Semi Chem*, *Ramsdens Jewellers*, *Poundland*, *The Card Factory*, *Lloyds Pharmacy*, *Timpson*, *Poundstretcher* and *WH Smith*

5.9.3 Closures include *Brighthouse*, *Burton and Johnson Cleaners*, along with a number of local retailers. *Pep&Co*, the discount clothing retailer owned by *Poundland*, recently expanded into the unit previously occupied by *Brighthouse*.

5.9.4 There are some 790 sq.m. (8,500 sq ft), among five units, of retail floorspace available for lease within *Kirkintilloch*. These are units which are being formally marketed at present. This may not fully reflect supply if there are further units available but not actively marketed.

5.9.5 There are currently limited retail requirements for *Kirkintilloch* at present, with only *Aldi* and *Vets4Pets* understood to be looking for retail property in the town.

5.9.6 Since 2010, there have been a total of 54 leasing deals for retail property in *Kirkintilloch*; an average of six deals per year.

5.9.7 Retail rents are currently around £183 per sq m (£17 per sqft), which is low. Over the past five years, rental values have ranged between £150 and £167 per sq.m (£14 and £15.5 per sq.ft). Yields are 8-10%.

5.9.8 In the local centre at *Lenzie*, the floorspace is mainly non-retail services and convenience floorspace- Table 5.1. *Twechar* is very minor.

5.10 Northern Villages market

5.10.1 The northern villages of *Lennoxton*, *Milton of Campsie* and *Torrance* have a very limited retail market, with a small number of shops present- Table 5.1 and graphs. The majority of floorspace is devoted to non-retail services and convenience stores serving the local market.

5.11 Strathkelvin Retail Park

5.11.1 The retail park represents by far the highest concentration of comparison retail floorspace in East Dunbartonshire, at some 25,000 sq m gross-see Appendix 9. It appears to be trading well and has a wide range of non-food retailers. Interestingly, customers to the retail park are probably mostly from the Council area, with a relatively small proportion drawn from beyond East Dunbartonshire – see Table 9.5 (NSLSP survey). Most of the small expenditure inflow shown on that table relates to *Strathkelvin Retail Park*, but it is small.

5.12 Cinema development market- E Dunbartonshire

5.12.1 Leisure uses, particularly cinemas and restaurants, have been the focus of recent development activity in prime retail high streets, malls and parks. Cinema operators have been successfully attracted to such locations by developers, typically where there is existing and potential restaurant provision. In general, cinema operators pay less rent than retailers and expect a capital contribution from the developer. The benefit to the developer is that a cinema acts as an anchor, attracting more restaurants, which have a higher rental value.

5.12.2 The likelihood of attracting a cinema operator to East Dunbartonshire, with *Strathkelvin Retail Park* as the most likely location, will depend on:

- the operator and its target market;
- the potential for further restaurant provision; and
- the level of potential developer interest.

5.12.3 There are also examples of community-led initiatives to establish or re-establish cinemas in small and medium sized towns. An example appeared in the Press recently. A disused swimming pool building in *Montrose* is to be adapted to provide a three-screen cinema and community hub, following a successful funding application. The *Montrose Playhouse Project* secured £2.26m in funding from the Scottish Government's Regeneration Capital Grant Fund towards the £3.26m capital costs, enabling a start on site to be made in June. Other examples of community-supported

cinemas exist in small/ medium sized towns in Scotland.

5.13 Summary

5.13.1 The following points emerge from the retail and commercial market analysis for East Dunbartonshire in this section:

- Proximity to Glasgow means high expenditure leakage and leisure attractions in the city which limits the market in the four East Dunbartonshire town centres
- Non-retail service occupiers are a very important component of the mix of uses in the town centres
- Comparison floorspace is a significant proportion of the totals in Milngavie and Kirkintilloch
- Apart from Kirkintilloch town centre, the vacancy rates are mainly low
- Multiple retailer representation is good in Bishopbriggs and Kirkintilloch for towns of their size. It is relatively weak in Bearsden
- There are very few known retailer requirements to locate in the four town centres. Annual take-up of premises in each town is small
- Retail rents are mostly at the level which could be expected for small town centres, although rental levels in Kirkintilloch are quite low, given that it is the largest town.

6 Town centre health checks

6.1 Introduction

6.1.1 This section contains health check assessments of the town centres of *Bearsden, Milngavie, Bishopbriggs and Kirkintilloch*. Commentary is included on the Northern Villages. It draws on the survey information provided in previous sections. There is a short explanation of the key performance indicators, followed by the health checks for each town centre as distinct sub sections in a single column format to assist presentation.

6.2 Key indicators

6.2.1 The key performance indicators are based on a selection of those in the USP (*Understanding Scottish Places*) Town Audit 2015 and the current SPP. The level of detail in the USP is well beyond the scope of this report, so the selected key indicators are at varying levels of detail, which in most cases is at a brief summary level.

6.2.2 The applied key performance indicators are set out in the following paragraphs. Note that pedestrian footfall count is a key indicator too, but mostly relevant to large town centres, where there are various retail pitches. They have not been undertaken for this report in accordance with our response to the brief.

6.2.3 **Diversity of uses-** information on the mix of land uses in the town centres is provided in section 5. Simple summary descriptions are provided in the health checks, based on the following range: *wide variety, medium variety and limited variety*.

6.2.4 **Quality of the built environment-** This indicator is applied in the form of a brief written description for each town centre, based on key physical features and perceptions from previous surveys.

6.2.5 **Recent and proposed investment-** contains a brief description of significant development projects and regeneration initiatives.

6.2.6 **Accessibility-** indicates the ease with which the public can visit the town centres and the key issues. It includes evidence on the

levels of accessibility for each town centre to include car parking, bus services and rail services, together with public perceptions where information exists.

6.2.7 **Attitudes and perceptions-** on the town centres is drawn from the Town Centres Strategies in 2017 and from responses to the household survey for the 2014 Retail Capacity Assessment, which contained questions on the use and perception of the town centres. Other survey information is also referred-to. This provides valuable information on what the public see as key issues for the town centres.

6.2.8 **Retailer representation and demand-** is an indicator of the strength of the retail offer and demand in the three town centres. The information is drawn from section 5. Multiple retailer representation is expressed as: *nos. of multiple retailers/ (nos. of convenience + comparison retailers)* in this study. Multiple retailers include those with nine or more outlets (Experian). We have not included charity shops. Also, non-retail service multiples have not been included.

6.2.9 **Retail rents and commercial yields-** are measures of the market demand and the overall value of town centre premises as investments. For the smaller towns, commercial yields are often similar, as shown in section 5.

6.2.10 **Vacancy rates-** are also an indicator of the market demand for town centre properties and a visible indicator of performance. Information is provided in section 5 for each of the town centres. For the health checks, vacancy rates are expressed as: *vacant units/ (retail units+non-retail units and vacant units)*. The unit-based approach allows comparison with national data.

6.2.11 **Cultural and social events-** are indicators which contribute towards the sense of identity associated with town centres, including community involvement. The main events associated with each town centre are listed.

6.2.12 **Leisure and cultural facilities, including the evening economy-** contribute to the range of land uses and vitality of the town

centres. The main facilities are summarised, together with information on use and perceptions from the interview surveys.

6.2.13 **Sense of place-** is a subjectively expressed combination of the results of applying the other indicators, with an emphasis on the quality of environment, diversity of offer and social, historical and cultural associations. It is intended to distil the defining characteristics of any town centre into a few words or images.

6.2.14 **Crime and safety-** where these are recorded as issues in the town centres.

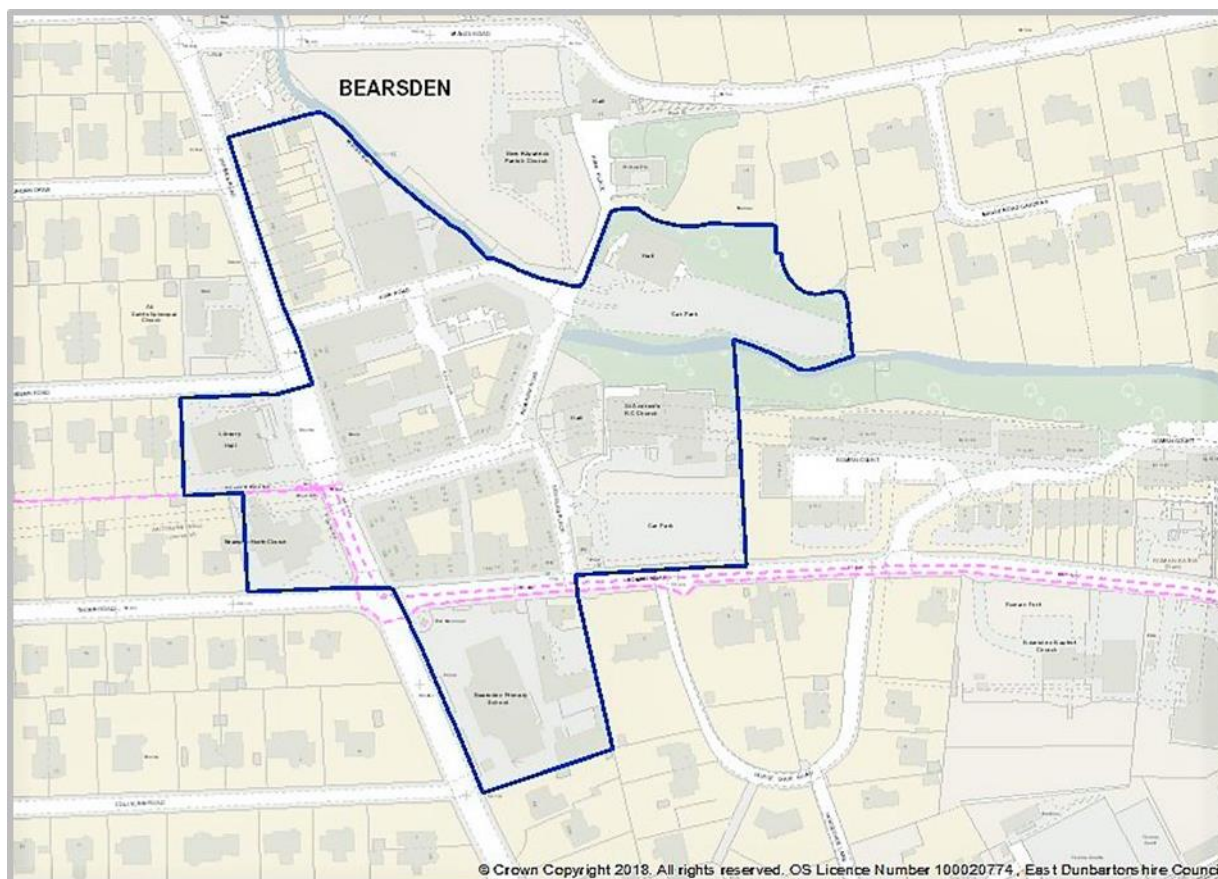
6.2.15 **SWOT analysis-** is provided in a table at the end, for each of the town centres. The aim is to highlight the main strengths, weaknesses, opportunities and threats.

6.3 Bearsden Town Centre health check

Population- 28,120 (National Records Scotland, mid 2016 Locality estimate). Zone 1 catchment population similar in 2019.

6.3.1 Map 6.1 shows the town centre boundary as defined in the Local Development Plan 2017

Map 6.1 Bearsden Town Centre



6.3.2 **Distribution of floorspace-** is shown in detail in section 5 for Bearsden town centre. Table 5.1 and the accompanying graphs show the proportions by type of floorspace. Comparison and convenience retailers account for 31% of the total occupied floorspace within the town centre (16% and 15% respectively). However, more than half of the occupied floorspace, at 57%, is occupied by non-retail uses. Restaurants, cafes, pubs and take-aways comprise one-third of non-retail floorspace. The quality of food and drink offerings in Bearsden town centre is relatively high, but overall, the variety of uses is limited. Vacant units account for 12% of the total floorspace. There is limited obvious space to accommodate new retail development or non-retail services in the town centre. Overall, the mix of uses in the town centre appears to function well in its defined role within the network of centres.

6.3.3 **Quality of the built environment-** Bearsden town centre is concentrated around 'The Cross' where Drymen Road and Roman Road meet, and includes Kirk Road, New Kirk Road and Douglas Place. Much of the built environment in the town centre dates from the late 18th/early 19th centuries and is generally attractive and well-maintained. The buildings are mainly traditional two/three storey sandstone shop units interspersed with community building, including churches. Pleasant

wooded areas and open spaces give the town centre a high-quality feel. It includes historic and listed buildings forming part of the Old Bearsden Conservation area.



6.3.4 Recent and proposed investment- East Dunbartonshire Council opened a new Community Hub in March 2017 following a £3m investment in Bearsden town centre. This brings together several Council services including library, leisure and cultural services. The building also provides meeting rooms and social work facilities, public toilets and public events space.

6.3.5 Accessibility- Bearsden is located on the main A809 road linking Drymen to Glasgow City Centre. The town centre is compact and easy to walk around. Bearsden Railway Station is within a short walk of the town centre, linking to Glasgow City Centre, Edinburgh and Milngavie. The town centre is also served by various bus services, (with bus stops situated on either side of the Bearsden Cross) linking to Milngavie, and locations within Glasgow City Centre.

6.3.6 Car parking is available within two short stay car parks - at Douglas Place/Roman Road (71 spaces) and The Glebe, Kirk Road (84 spaces) and time-restricted on-street parking. Parking charges are in place at the Douglas Place/Roman Road car park. Additional free parking is available at the Community Hub (35 spaces). There are also 100 spaces available at Bearsden Station. There are no pedestrian-only zones within the town centre. Results from the household survey in 2014 (see below) showed that nearly 30% of respondents who regularly go to the town centre visit it *between 3 and 6 times a week*, with 24% *visited weekly* and 21% *visiting 2-3 times a month*.

6.3.7 Attitudes and perceptions- were recorded during consultation by East Dunbartonshire Council on the Bearsden Town Centre Strategy in 2017 and by the household survey undertaken for the 2014 Retail Capacity Study. For the Town Centre Strategy consultation, respondents were asked, via an on-line survey, to rate their chosen town on a scale of 1-7 using *Place Standard* categories. Overall, respondents felt Bearsden to be relatively safe and valued its identity and sense of belonging. It was felt that there was a strong sense of community. The town's historical roots can be traced back to Roman times, with the town centre being located on the line of the Antonine Wall World Heritage Site. Residents take pride in the town's Roman heritage and in the quality of the built environment.

6.3.8 From the 2014 Retail Capacity Study household survey, those respondents who identified Bearsden town centre as their most frequently visited centre in Question 6 were asked what they liked most about it for shopping and as a place to visit generally (Q8). The most common responses were *close to home/convenient/close to work* (36%) and *range/choice of shops generally* (25%). Other responses only recorded small proportions. Respondents were then asked what they disliked most about the town centre (Q9). The most common responses were *nothing in particular* (41%), *limited parking* (33%) and *inconvenient parking* (8%).

6.3.9 (Q10) Rating the town centre- the respondents were asked how they compared the street environment with other towns they know. Some 47% rated the town centre as *good*, 20% as *very good* and 28% as *average*. Just under 18% considered the town centre as *poor/very poor*. In Q11, the respondents were asked what would make them visit more often. Some 28% said *more/cheaper parking* and 19% *more/better shops generally*. However, 25% indicated that nothing would make them visit more often.

6.3.10 **Retailer representation and demand-** multiple retailer representation is limited at 20% in the town centre- see Table 5.5. There is, however, a range of independent shops serving mainly residents. There are no large supermarket operators, or discount food retailers, located within the town centre. The range of shops is shown in section 5.6.

6.3.11 **Retail rents and yields-** current Zone A rents are around £280 per sq m (£26 per sq ft). In a small market like Bearsden, retail transactions are not always formally recorded meaning rental values can be more difficult to establish. Yields are likely to be in the region of 8-10% depending on the quality of unit and strength of covenant- section 5.6.

6.3.12 **Vacancy rates-** there are 9 vacant units, giving a vacancy rate of 10% in the town centre- (Table 5.4)

6.3.13 **Cultural and social events-** There are no large outdoor public spaces within the town centre to host large cultural and social events for the wider community. The Community Hub is the main focal point within the town centre for public space, alongside the local church halls, but these provide limited space. There is an annual event for the switching on the Christmas lights at Bearsden Cross for the community. However, public events tend to be held elsewhere, for example the Bearsden & Milngavie Highland Games which are hosted in Milngavie.

6.3.14 **Leisure and cultural facilities, including the evening economy-** again, the Community Hub is the main place for leisure and cultural facilities within the town centre. Outside the town centre, Allander Sports Centre (on Milngavie Road), operated by East Dunbartonshire Council, on Milngavie Road provides sports facilities. Kilmardinny House, on Kilmardinny Avenue, operated by the Council, provides conference, meetings and events space. It has recently been refurbished at a cost of £2.73million. The evening economy is, generally, centred on the restaurants in the town centre.

6.3.15 Results from the household survey (Q12) on frequency of visits to the town centre in the evening showed that around 64% of respondents *never visit*. Around 15% visited *less than once a month* and 10% visited *once a month*. All other responses were in low proportions. In Q13, respondents were asked what would make them visit more often in the evenings. Around 22% said *more/better restaurants* and 9% *more/better pubs*. However, almost 58% said nothing would make them visit more often.

6.3.16 **Crime and safety-** security issues were not noted as a significant concern by residents.

6.3.17 **Sense of place-** Bearsden's sense of place is strongly linked to its historic environment, and its Roman heritage. However, the main monument related to this heritage, the remains of the Roman Bath House, is situated just outside of the town centre, to the east. The town centre itself is defined by its Victorian/Edwardian character and attractive historical buildings.

SWOT summary

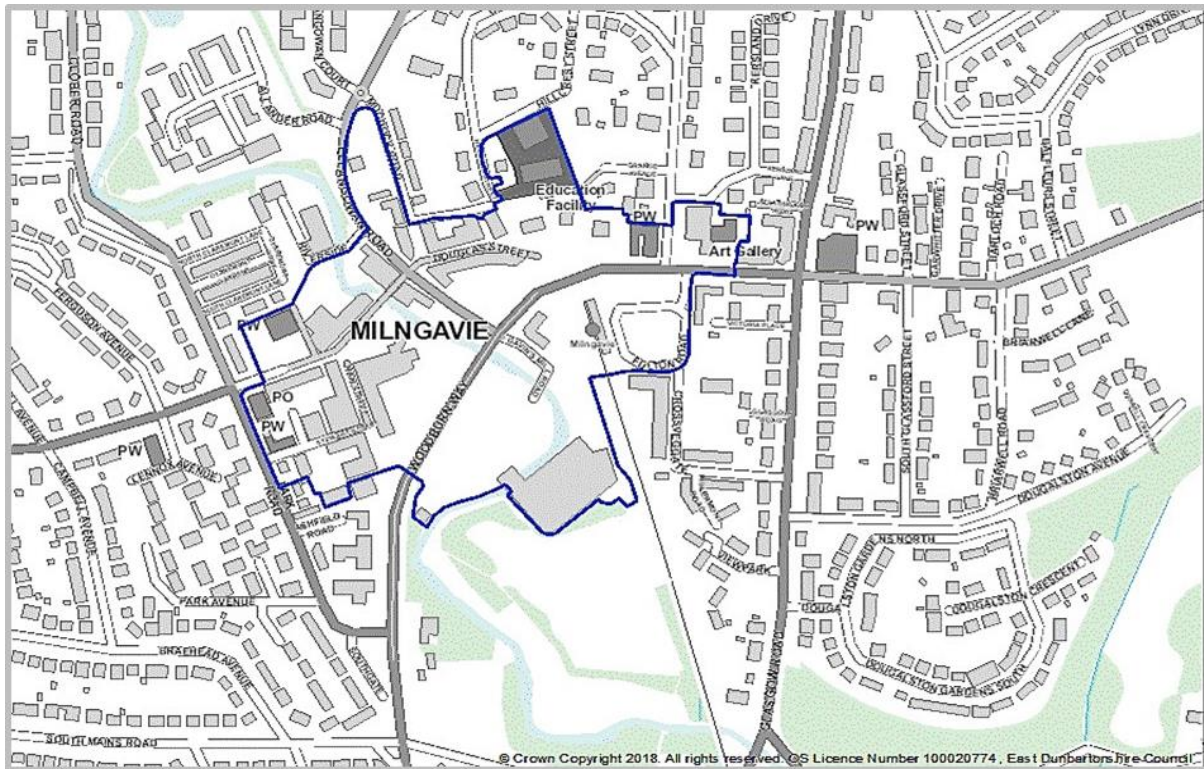
| Strengths | Weaknesses |
|---|--|
| <ul style="list-style-type: none"> • Compact town centre • Historic environment-strong sense of place • Well-maintained built environment • Large resident population, which is relatively affluent • Accessibility • Attractive centre | <ul style="list-style-type: none"> • Lack of pedestrian-only space • Limited convenience retailing • Few special attractions for visitors • Limited obvious space for new retail development or non-retail services • Range of shops could be wider/ more quality |
| Opportunities | Threats |
| <ul style="list-style-type: none"> • Public events space • More to attract visitors • Scope for more quality restaurants | <ul style="list-style-type: none"> • Competition from other centres • Growth in internet shopping • Need to maintain the quality of environment • Uncertainty over future economic climate may affect spending/ town centre investment |

6.4 Milngavie Town Centre health check

Population- 12,940 (National Records Scotland, mid 2016 Locality estimate). Zone 2 catchment population 14,082 in 2019.

6.4.1 Map 6.2 shows the town centre boundary as defined in the Local Development Plan 2017.

Map 6.2 Milngavie Town Centre



6.4.2 Distribution of floorspace- is shown in detail in section 5 for Milngavie town centre, in Table 5.1 and the accompanying graphs which show the proportions by type of floorspace. The split of occupied floorspace is balanced in Milngavie town centre, with convenience and comparison retailers each accounting for one-third. Just under a third, comprises of non-retail service uses. Within the non-retail uses, restaurants/cafes/pubs/take-aways account for 21% of the occupied floorspace. Only 3% of floorspace within the town centre is vacant. There is limited obvious space to accommodate new retail development or non-retail services in the town centre. Overall, the mix of uses within the town centre appears to function well in its defined role within the network of centres.

6.4.3 Quality of the built environment- Most of Milngavie town centre falls within the Milngavie Conservation Area and includes three listed buildings - the railway station, Black Bull hotel building and Gavin's Mill. The existing town centre is situated around the original village centre and was largely pedestrianised during the 1970s. The buildings within the town centre contain a mix of older and modern properties but are generally no more than two-storey in height. Some of the older buildings are notable for their architectural features, particularly those built during the inter-war years. These are characterised by half-timber facades, rosemary roof tiles and astragal oriel windows. Overall, the town centre appears attractive and well-maintained.

6.4.4 Recent and proposed investment- The children's playpark located in the Milngavie Precinct has recently been upgraded with new play equipment installed at the cost of £40,000.

6.4.5 Accessibility- The core of the town centre is centred on the pedestrianised area, known as Milngavie Precinct, comprising Station Road, Douglas Street and part of Main Street. There are two underpasses linking Tesco and Gavin's Mill to the town centre. Car parking is provided in a number of locations including four pay and display car parks at Douglas Street (57 spaces), Mugdock Road (73 spaces) Stewart Way North (21 spaces) and Woodburn Way (65 spaces). There are a further 250 free spaces provided across the town. These include 99 spaces at Milngavie Station which is situated at the eastern end of the town centre. Rail services provide direct links to Glasgow and Edinburgh. There are bus services connecting Milngavie with Glasgow and the surrounding areas.

6.4.6 Attitudes and perceptions of the town centre- were recorded during consultation by East Dunbartonshire Council on the Milngavie Town Centre Strategy in 2017 and by the household survey undertaken for the 2014 Retail Capacity Study. For the Town Centre Strategy consultation, respondents were asked, via an on-line survey, to rate their chosen town on a scale of 1-7 using Place Standard categories. Overall, respondents felt a strong sense of identity and belonging. Access to natural space was considered as a positive attribute, as was pedestrian and cycle accessibility.

6.4.7 From the 2014 Retail Capacity Study household survey, those respondents who identified Milngavie town centre as their most frequently visited centre in Question 6 were asked what they liked most about it for shopping and as a place to visit generally (Q8). The most common responses were *range/choice of shops generally* (31%), *easy/pleasant to walk about/pedestrian areas* (24%) and *close to home/convenient/close to work* (21%). Other responses only recorded small proportions. Respondents were then asked about what they disliked most about the town centre (Q9). The most common responses were *nothing in particular* (35%), *limited parking* (12%) and *range of shops generally* (10%).

6.4.8 (Q10) Rating the town centre- the respondents were asked how they compared the street environment with other towns they know. Some 57% rated the town centre as *good*, 19% as *very good* and 12% as *average*. Around 10% considered the town centre as *poor/very poor*. In Q11, the respondents were asked what would make them visit more often. Some 22% didn't know while 17% indicated *more/better shops generally* and just under 17% said *more/cheaper parking*.

6.4.9 Retailer representation and demand- multiple retailer representation is 31% which is a good level. Milngavie also offers a range of independent shops and serves both residents and visitors, particularly those walking the West Highland Way.

6.4.10 **Retail rents and yields-** current Zone A retail rents are around £376-£484 per sq m (£35-45 per sq ft), based on asking rents for existing available units. Yields are in the region of 8%-10%, depending on the building quality and strength of tenant covenant.

6.4.11 **Vacancy rate-** in the town centre is low at 4%, well below the current Scottish average of 12%.

6.4.12 **Cultural and social events-** include the Milngavie Makers market, held in Milngavie town hall, which is a monthly indoor artisan market. The Town Hall also regularly hosts music events, other markets and public events. The Milngavie BID, established in May 2014, has organised events in the town centre including a beer festival and a classic car show. The Bearsden and Milngavie Highland Games are held annually, outside the town centre at the West of Scotland Football Club.

6.4.13 **Leisure and cultural facilities, including the evening economy-** within Milngavie town centre is the Fraser Centre, run by the community, providing a range of social and community events. Milngavie Town Hall is located on the eastern edge of the town centre and contains space for events and meetings available for hire. Next to the town hall is Lillie Art Gallery, under the management of East Dunbartonshire Leisure & Culture Trust. This purpose-built art gallery holds a collection of around 450 works of art.

6.4.14 Results from the household survey (Q12) on frequency of visits to the town centre in the evening showed that around 60% *never visit*. Just under 13% *visit less than once a month*, with around 10% *visiting once a month*. About 8% *visit 2-3 times a month*. In Q13, respondents were asked what would make them visit more often in the evenings. Around 26% said *more/better restaurants* and 25% said *more/better pubs*. However, almost 28% said nothing would make them visit more.

6.4.15 **Crime and safety-** safety and security is not considered a major issue within the town centre, especially during the day. However, consultation on the town centre strategy highlights the underpasses as an area of concern along with lack of activity in the evening.

6.4.16 **Sense of place-** Milngavie town centre has a strong identity with its pedestrian friendly precinct and attractive built environment. It also attracts a number of visitors as it is the starting point of the West Highland Way, though more could be done to encourage visitors to spend time in the town centre.

SWOT summary

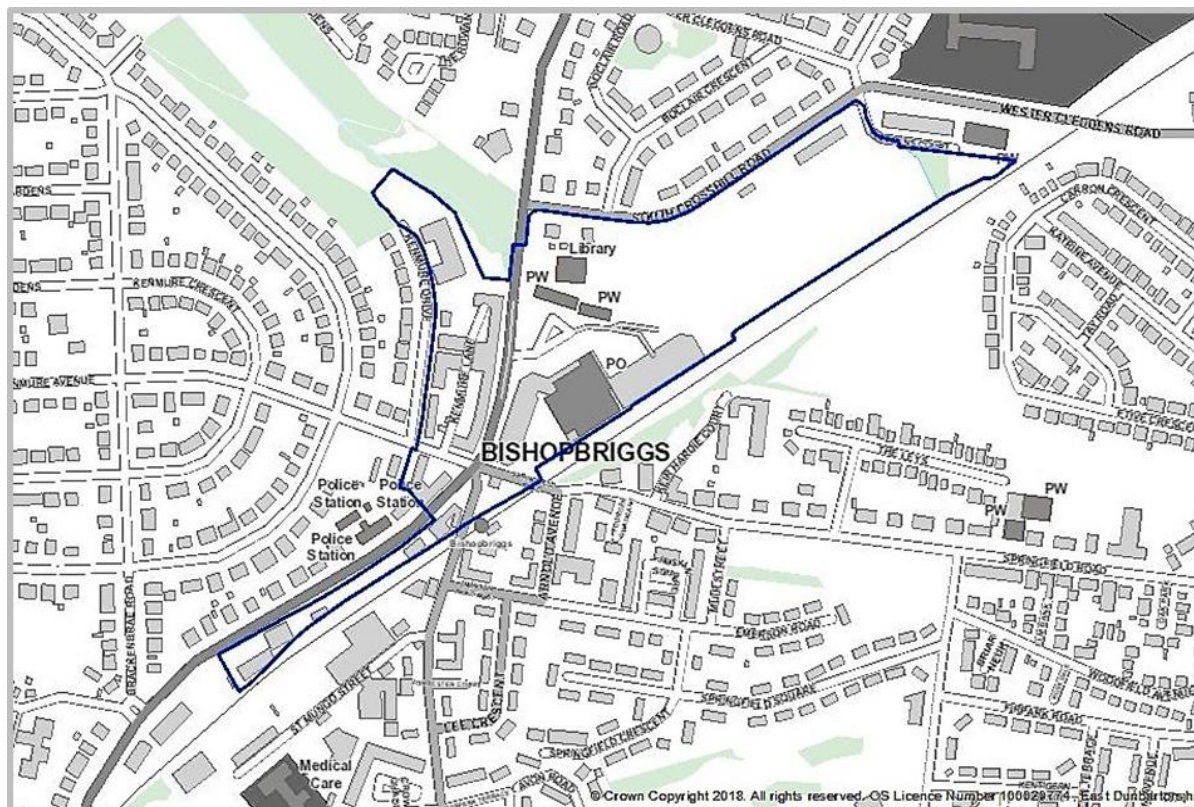
| Strengths | Weaknesses |
|--|--|
| <ul style="list-style-type: none"> • Compact town centre • Mostly safe and accessible for pedestrians • Attractive setting with easy access to the countryside • Mix of multiple retailers and local independent shops • Children's play area • Low vacancy rates • Strong sense of place | <ul style="list-style-type: none"> • Lack of evening economy • Security concerns around the underpasses in the evenings • Limited obvious space for new retail development or non-retail services |
| Opportunities | Threats |
| <ul style="list-style-type: none"> • Potential to capture more visitor expenditure • Potential to boost the evening economy by attracting more people into the centre • More/ better restaurants and pubs | <ul style="list-style-type: none"> • On-line retailing • Competition from other centres • Need to maintain the quality of environment • Uncertainty over future economic climate may affect spending/ town centre investment |

6.5 Bishopbriggs Town Centre health check

Population- 23,540 (National Records Scotland, mid 2016 Locality estimate). Zone 3 catchment population similar in 2019.

6.5.1 Map 6.3 shows the town centre boundary as defined in the Local Development Plan 2017.

Map 6.3 Bishopbriggs Town Centre



6.5.2 **Distribution of floorspace-** is shown in detail in section 5 for Bishopbriggs town centre, in Table 5.1 and the accompanying graphs which show the proportions by type of floorspace. Convenience retailing accounts for almost a third of the occupied floorspace and includes the Morrison's supermarket located at the Triangle Shopping Centre. Comparison retailing accounts for a low proportion of the occupied floorspace, at just 15%. Non-retail uses account for 44%. Of this, Property/offices/professional services comprise 46% of the non-retail floorspace and restaurants/cafes/pubs/take-aways 19%. Around 8% of the town centre floorspace is vacant. Overall, the mix of uses within the town centre appears to function well in its defined role within the network of centres.

6.5.3 A vacant site of some 3.3 ha also lies within the town centre boundary, by South Crosshill Road. The site is under the ownership of WM Morrison Supermarkets plc ('Morrison's'). In March 2019, a planning application was submitted for part of this site, consisting of the redevelopment of their existing store and car park together with a new petrol filling station. This application forms part of a wider proposal to deliver two new residential areas and create a new civic space, as part of a masterplan approach-see details under *Recent and proposed investment* below.



6.5.4 Quality of the built environment- Bishopbriggs town centre, known as 'The Bishopbriggs Cross', is set out in a linear form, with the shops and services concentrated on both sides of Kirkintilloch Road. This is a busy traffic route along the A803 to Glasgow, and as such traffic dominates the town centre. There is no obvious focal point within the town centre such as a public square or any other significant civic space. The buildings comprise a mix of traditional tenements, with ground floor retail units and flats above, and more modern buildings such as the Triangle Shopping Centre. There are three listed buildings within the town centre – the library, Crow Tavern and St Matthew's Church.

6.5.5 Recent and proposed investment- Morrison's has submitted a planning application (TP/ED/19/0186) for redevelopment of their existing superstore and car park to create a replacement store, car park, petrol filling station, access, landscaping and associated works. East Dunbartonshire Council recently invested £2m in refurbishing Bishopbriggs Library to create a new community hub. The Community Hub incorporates the library alongside council and cultural services.

6.5.6 Accessibility- Bishopbriggs town centre is accessible by car with parking available at Morrisons/The Triangle Shopping Centre. Bishopbriggs train station is located within the town centre with services to Glasgow and Edinburgh. There are also a number of bus services connecting the town centre to Glasgow, Kilsyth, Kirkintilloch and other East Dunbartonshire towns. There are no pedestrian areas within the town centre. Due to the volume of traffic passing through the town centre, signalised crossing points are in place to cross Kirkintilloch Road.

6.5.7 Attitudes and perceptions of the town centre- were recorded during consultation by East Dunbartonshire Council on the Bishopbriggs Town Centre Strategy in 2017 and also by the household survey undertaken for the 2014 Retail Capacity Study. For the Town Centre Strategy consultation, respondents were asked, via an on-line survey, to rate their chosen town on a scale of 1-7 using Place Standard categories. Based on the responses to this survey, traffic and parking was identified as a key issue, alongside the quality of streets and public spaces. Good public transport links were highlighted as a positive attribute.

6.5.8 From the 2014 Retail Capacity Study household survey, those respondents who identified Bishopbriggs town centre as their most frequently visited centre in Question 6 were asked what they liked most about it for shopping and as a place to visit generally (Q8). The most common responses were close to home/convenient/close to work (45%), range/choice of shops generally (14%) and nothing in particular (13%). Respondents were then asked about what they disliked most about the town centre (Q9). The most common responses were range of shops generally (32%) and nothing in particular (31%).

6.5.9 (Q10)Rating the town centre- the respondents were asked how they compared the street environment with other towns they know. Some 38% rated it good and 29% rated it average whilst

around 28% rated it poor/very poor. In Q11, the respondents were asked what would make them visit more often. Some 40% indicated more/better shops generally and 17% said nothing/no change.

6.5.10 Retailer representation and demand- multiple retailer representation is 33% in the town centre, which is a good level for the size of the town. There is, however, not a wide range or variety of independent shops serving the local market.

6.5.11 Retail rents and yields- current Zone A retail rents are around £269 - 323 per sq.m (£25-£30 per sq.ft), based on asking rents for existing available units. Yields are 8%-10%.

6.5.12 Vacancy rate- in the town centre is 7%, lower than the Scottish average of 12%.

6.5.13 Cultural and social events- There are limited events held within Bishopbriggs Town Centre. There is an annual Gala day held at the Fort Theatre, located to the north east of the town centre. The Fort Theatre also hosts regular entertainment shows and events throughout the year.

6.5.14 Leisure and cultural facilities, including the evening economy- Bishopbriggs Community Hub houses the Thomas Muir Museum within the library. It also provides space for arts and events, and meeting rooms. St Mathew's Church is currently being refurbished with work anticipated to be completed by April 2020.

6.5.15 Results from the household survey (Q12) on frequency of visits to the town centre in the evening showed that around 48% never visit. Just under 18% visit less than once a month, with around 11% visiting once a month. Some 9% visit weekly and another 9% between 3-6 times per week. In Q13, respondents were asked what would make them visit more often in the evenings. Around 16% said more/better pubs and 13% said more/better restaurants. However, 59% said nothing would make them visit more.

6.5.16 Crime and safety- security issues did not feature as a concern in the survey findings.

6.5.17 Sense of place- Bishopbriggs town has a less strong sense of place than Bearsden and Milngavie. This is due, in part, to the linear layout along a busy trunk road and the presence of Strathkelvin Retail Park on the outskirts. It also has limited public space and historic buildings.

SWOT summary

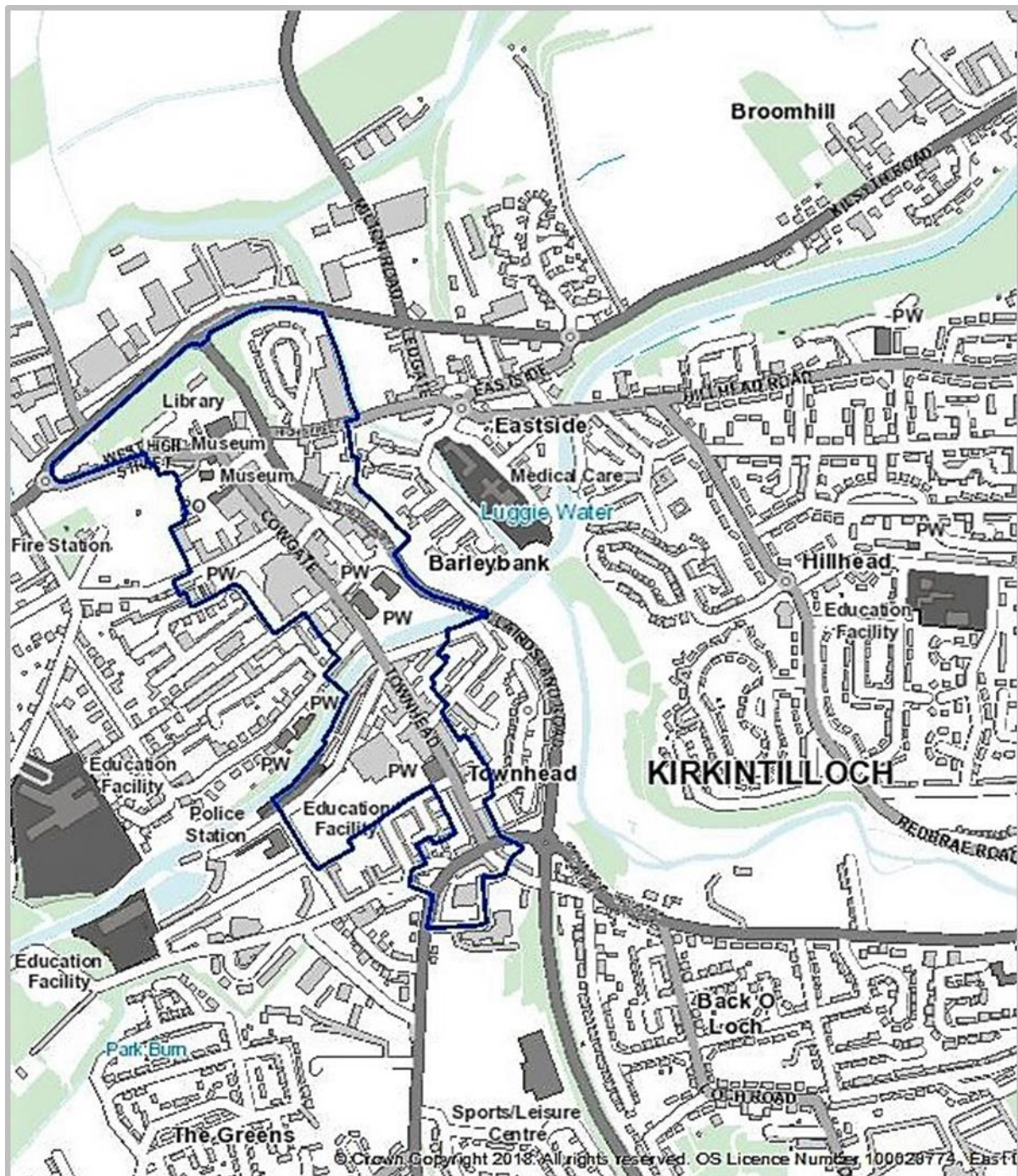
| Strengths | Weaknesses |
|--|---|
| <ul style="list-style-type: none"> • Good multiple retailer representation • Pleasant & well- kept buildings • Well- located to serve its local catchment population • Low vacancy levels • Fair range of non-retail services • Good retention of convenience expenditure- section 7 | <ul style="list-style-type: none"> • Heavy through traffic on wide multi-lane road • Limited range of independent shops • Limited numbers and range of shops • Difficulties with parking/difficult to stop • Limited spare convenience capacity- section 8 • Town centre not rated highly as a place to visit, overall, by the household survey |
| Opportunities | Threats |
| <ul style="list-style-type: none"> • Improved range and quality associated with proposed new Morrisons • Current Morrisons application for a replacement supermarket, plus opportunities for residential development and civic space • Scope for improved parking provision and management • Some limited forecast spare comparison expenditure capacity -see section 10 | <ul style="list-style-type: none"> • Uncertainty over future economic climate may affect spending/ town centre investment • Growing level of internet spending • Need to maintain/ improve the quality of environment • Competition from other centres |

6.6 Kirkintilloch Town Centre health check

Population- 21,380 (National Records Scotland, mid 2016 Locality estimate). Zone 4 catchment population 30,696 in 2019.

6.6.1 Map 6.4 shows the town centre boundary as defined in the Local Development Plan 2017. An extract from the Clydeplan in section 3 of our study outlines the main problems and required actions needed improve Kirkintilloch town centre.

Map 6.4 Kirkintilloch Town Centre





6.6.2 **Distribution of floorspace-** is shown in detail for Kirkintilloch town centre in Table 5.1 and the accompanying graphs which show the proportions by type of floorspace. Retail use accounts for 49% of the floorspace (19% convenience and 30% comparison), with 42% as non-retail services. Some decline in retail floorspace since 2012 is indicated in Table 5.2 - mostly comparison retail floorspace. Among the non-retail service floorspace in Table 5.3, there is quite a substantial proportion devoted to property, offices and professional services and to public services/ miscellaneous, which is consistent with Kirkintilloch's role in the network of centres for administration and other services relating to the wider area. The proportion of floorspace relating to restaurants/cafes and pubs (hospitality sector) is quite limited for town of this size, which will have some negative bearing on the evening economy. Overall, the mix of uses within the town centre has some weaknesses under its role as a strategic centre, namely, risk that the comparison retail uses may decline and the limited evening economy sector.

6.6.3 A significant problem with the town centre is that it is too long and linear to function well for shoppers- see following paragraphs. It is like a corridor. There may be benefit in redefining the town centre boundary to create a more compact area to encourage a greater focus for retailing and encourage retention of retailers and investors. For example, it could include Cowgate from the junction with Catherine Street, north to the junction with David Donnelly Place. Also, the benefit of including Townhead in the defined town centre is questionable. The big draw is Sainsbury's and the rather poor offering on Townhead main street does not look as if many customers at Sainsbury's use the main street shops, except perhaps immediate residents.

6.6.4 **Quality of the built environment-** the town centre is in the form a of a long north-south strip with Cowgate to the north of the Forth & Clyde Canal and Townhead to the south. The southern end of Cowgate has a church and further up, parades of two storey shop units, among which the Regent Shopping Centre has a frontage. The buildings are a mix of 19th century (some with peeling paint) and probably 1970s developments of rather bleak appearance. Further north along Cowgate, the parades of shops intensify. There are unattractive 1960s style, two storey units with shops on the ground floor and storage/ offices on the first floor, on one side. Facing them on the other side of the street are mainly three storey units with residential use on the upper floors and shops on the ground floor with a continuous canopy a 1960s/70s style. Many of the units are vacant. Cowgate appears generally clean and well-kept. Some of the shop fronts are poor quality and design. The relatively up-to date William Patrick Library forms north end to Cowgate. The relatively new road surfacing, modern paving work and lighting and street fixtures at the north end of Cowgate are good quality.

6.6.5 Townhead is a mix of building styles, with 1960s style units, tenement blocks, including shops units, and flats. There are small office units above the shops at 74 Townhead (Kirkintilloch Business Centre) on the southern edge of the town centre. The streetscape is somewhat bleak, and the

environment is of a lower quality than Cowgate. Many of the units are occupied by non-retail services, although there is a Farmfoods. The principal store in Townhead is Sainsbury's.

6.6.6 Recent and proposed investment- public realm works in Cowgate, including a major street design project – see *Accessibility* paragraph below. It was undertaken in 2016/17, at a cost of £3.2 million, funded by the Council and Sustrans Scotland, with support from Strathclyde Passenger Transport.

6.6.7 Accessibility- Kirkintilloch is on the A806 which runs south to link with the M80, which gives access to Glasgow City Centre via the M8. The M80/M8 junction also connects to reach The Fort Shopping Centre. The A803 links with Bishopbriggs to the southwest. Minor roads extending east from Kirkintilloch towards Cumbernauld are twisty and slow for travelling. There is no direct rail access to Kirkintilloch, as the nearest station is at Lenzie, where the station has parking for 149 cars. The town is served by various buses though, including links to Lenzie Station. The Forth & Clyde Canal passes through the town centre, providing pleasant amenity and linkages for leisure users.

6.6.8 Within the town centre, recent street works in the Cowgate have greatly improved the pedestrian/ traffic interrelationship, with wider space being given to pedestrians. As mentioned in the previous paragraphs, the length of the town centre presents an accessibility issue. On other matters, the Clydeplan also refers to opportunity to improve links with the Antonine Wall and the Forth & Clyde Canal to boost the attraction of visitors to Kirkintilloch.

6.6.9 Serving the town centre, there are pay and display car parks at Barleybank (84 spaces) and at the William Patrick Library (89 spaces). There is also free car parks at High Street (34 spaces), Rochdale Place (29 spaces), David Donnelly Place (10 spaces), Shamrock Street (24 spaces), Freeland Place (13 spaces), Catherine Street (23 spaces), Regent Centre (190 spaces), Southbank House (98 spaces) and Sainsbury's (274 spaces). The free parking totals 695 spaces. Results from the household survey in 2014 (see below) showed that 37% of respondents who regularly go to the town centre visit it between 3 and 6 times a week, with 31% visited weekly and 13% visiting daily.

6.6.10 Attitudes and perceptions of the town centre- were recorded by the household survey for the 2014 Retail Capacity Study. Those who identified Kirkintilloch town centre as their most frequently visited centre in Question 6 were asked what they liked most about it for shopping and as a place to visit generally (Q8). The most common responses were *close to home/ convenient* (38%), followed by *nothing in particular* (25%), and *range/ choice of shops generally* (9%). Other replies were in very small proportions each. Not much of an accolade. The respondents were then asked what they most disliked about the town centre (Q9). The most frequent responses were *range of shops generally* (36%), *nothing in particular* (24%), *quality of shops generally* (11%), *too many charity shops* (10%) and *limited parking* (9%).

6.6.11 (Q10) Rating the town centre – the respondents were asked how they compared the street environment with other towns they know. Some 26% rated the town centre as *good/ very good*, and 38% as *average* and 33% as *poor/ very poor*. The results indicate quality issues. In Q11, the respondents were asked what would make them visit more often. Some 49% said *more/better shops generally*, 13% said *nothing/ no change*, 9% said *more/ cheaper parking* and 8% *more specialist shops*. Other response proportions were very low.

6.6.12 Retailer representation and demand- multiple retailer representation is good at 33%, with 21 multiples. These are listed in section 5.9. Retailer requirements for Kirkintilloch are low, and so is the take-up of units, as indicated in section 5.9.

6.6.13 Retail rents and yields- current Zone A retail rents currently around £183 per sq m (£17 per sqft, which is low. Yields are 8%-10%.

6.6.14 Vacancy rate- in the town centre is 14%, with 36 vacant units (see section 5.4 and Table 5.4. The vacancy rate is the highest among the four towns in East Dunbartonshire. Vacant units in Cowgate and the Regent Centre should be of some concern, as it is the prime shopping areas.

6.6.15 **Cultural and social events-** include the Canal Festival, a visit by Zippo's Circus, and Kirkintilloch Gala Day. There are a few events in Kirkintilloch, as most advertised shows, concerts and other entertainment are in Glasgow, whose catchment includes Kirkintilloch for this type of activity.

6.6.16 **Leisure and cultural facilities, including the evening economy-** there are a few bars in the Kirkintilloch town centre and several cafes, restaurants of a mainly fast food nature, plus take-aways which comprise the limited 'hospitality' floorspace shown in Table 5.3. In total there are 21 units in these categories. In addition, there are 17 betting shops, snooker club, bowling club premises, the Auld Kirk Museum, William Patrick Library, a nightclub and various other clubs and associations, plus various halls. The evening economy is pretty limited, as indicated by the survey findings below.

6.6.17 Results from the household survey (Q12) on frequency of visit to the town centre showed that just over 11% visited the town centre in the evenings *once a month* and 11% *visited less frequently*. All other responses were in very low proportions. Fully 56% never visited the town centre in the evenings. In Q13, the respondents were asked what would make them visit more often in the evenings. Nearly 29% said *more/better restaurants*, 11% said *more leisure facilities* and 5% said 'a cinema'. However, 48% said nothing would make them visit more often.

6.6.18 The Kirkintilloch Leisure Centre at Woodhead Park is close to the town centre, which offers swimming, a gym, outdoor pitches, fitness classes and more.

6.6.19 **Crime and safety-** security issues did not feature as a concern in the household survey findings.

6.6.20 **Sense of place-** the town centre is within the Central Kirkintilloch Conservation Area and contains listed buildings and ancient monuments. It has a pleasant setting, with views to the Kelvin Valley and the Campsie Hills. The town centre has strong historic associations going back to Roman times and the advantage of being a location on the Forth & Clyde Canal for leisure and amenity. However, the current mixed architectural character of the commercial centre of the town, with numerous bland 1960s/70s units, detracts from its potential. Nevertheless, realisation of greater amenity and attraction of the town centre is entirely possible with effort. Overall, it has a definite sense of place which could be strengthened by further public realm works and projects.

SWOT summary

| Strengths | Weaknesses |
|---|--|
| <ul style="list-style-type: none"> • Good multiple retailer representation • Recent good public realm works in Cowgate • Sizeable catchment population • Covered shopping centre • Sense of place • Historic associations, including Antonine Wall • Forth & Clyde Canal | <ul style="list-style-type: none"> • Choice and quality of shops needs to be improved • Scope for more/ improved restaurants • Lack of evening activity • 14% vacancy rate • Town centre is too long to function well • Low retailer demand • Town centre environment needs further improvements, including shop-front signages • Indication of loss of retailers since 2012 • Under-trading in convenience sector • Lack of direct access by rail |
| Opportunities | Threats |
| <ul style="list-style-type: none"> • Review potential for making the town centre more compact- e.g. exclude Townhead • Some limited forecast spare comparison expenditure capacity -see section 10 • Scope for more quality restaurants and pubs to develop the evening economy- hospitality leisure uses • Further improvements to the town centre (e.g. shop frontages, masonry paintwork) to increase attraction to the town centre • Potential to capture more visitor expenditure | <ul style="list-style-type: none"> • Uncertainty over future economic climate may affect spending/ town centre investment • Growing level of internet spending • Increasing competition from the cities and superstores elsewhere • Need to resolve the issue of the length of the existing defined town centre which hampers functionality • Need vigorous efforts to upgrade the quality of the streetscape and environment |

7 Convenience expenditure and turnover

7.1 Introduction

7.1.1 This section of the report assesses the convenience expenditure and turnover relationships for each the five retail catchment areas shown in Map 2.1 and for the Council area in total. Account is taken the convenience shopping patterns identified in 2014 Retail Capacity Assessment, with amendments to reflect recent store developments.

7.1.2 The total turnover in each catchment area derives from the residents' expenditure potential, plus inflows, less outflows. The distribution of the turnover among the various centres and supermarkets is then controlled to the total deduced turnover for each catchment area from the shopping patterns.

7.2 Convenience goods-definition

7.2.1 Convenience goods include:

- *Food and non- alcoholic drinks*
- *Alcoholic drinks*
- *Tobacco*
- *Non- durable household goods; and*
- *Newspapers and magazines.*

7.2.2 This definition is provided in Pitney Bowes' *Retail Expenditure Guide 2018-19*, based on ONS classifications.

7.3 Convenience expenditure potential

7.3.1 Table 7.1 shows the forecast convenience expenditure per capita data for East Dunbartonshire, based on data commissioned from Pitney Bowes for this study. The forecast growth rate from 2019-29 is only 0.56% per annum (before deduction of SFT).

7.3.2 Special forms of trading (SFT), include internet shopping, mail order and other forms of retailing which are not wholly dependent on retail floorspace. In fact, internet shopping comprises almost all SFT. For retail planning purposes, it is removed from the expenditure per capita data, so that the

expenditure relates to conventional store floorspace, as shown in Table 7.1.

7.3.3 The proportion of SFT, or non-store sales, is forecast to increase up to 2029. It should be noted that the proportions of SFT shown in this table are mostly non-store sales and the proportions are low (3.5% currently). Not included are internet-related SFT sales with home delivery or click and collect for example, because the goods mainly come off existing supermarket shelves and that proportion is much larger but excluded here. The national proportions are applied in Table 7.1, based on data from Pitney Bowes.

7.3.4 Forecasts of the total convenience expenditure potential of the residents of each catchment area are shown in Table 7.2, excluding SFT.

7.4 Convenience shopping patterns-market shares

7.4.1 The 2014 Retail Capacity Assessment was underpinned by a household telephone interview survey by *RMG: Clarity* covering the Council area. The list of questions is shown in Appendix 2. For convenience shopping, the respondents were asked about their main food shopping and top-up shopping destinations. The findings were combined to provide estimates of all convenience shopping patterns relating to each of the five catchments, as shown in Table 7.3.

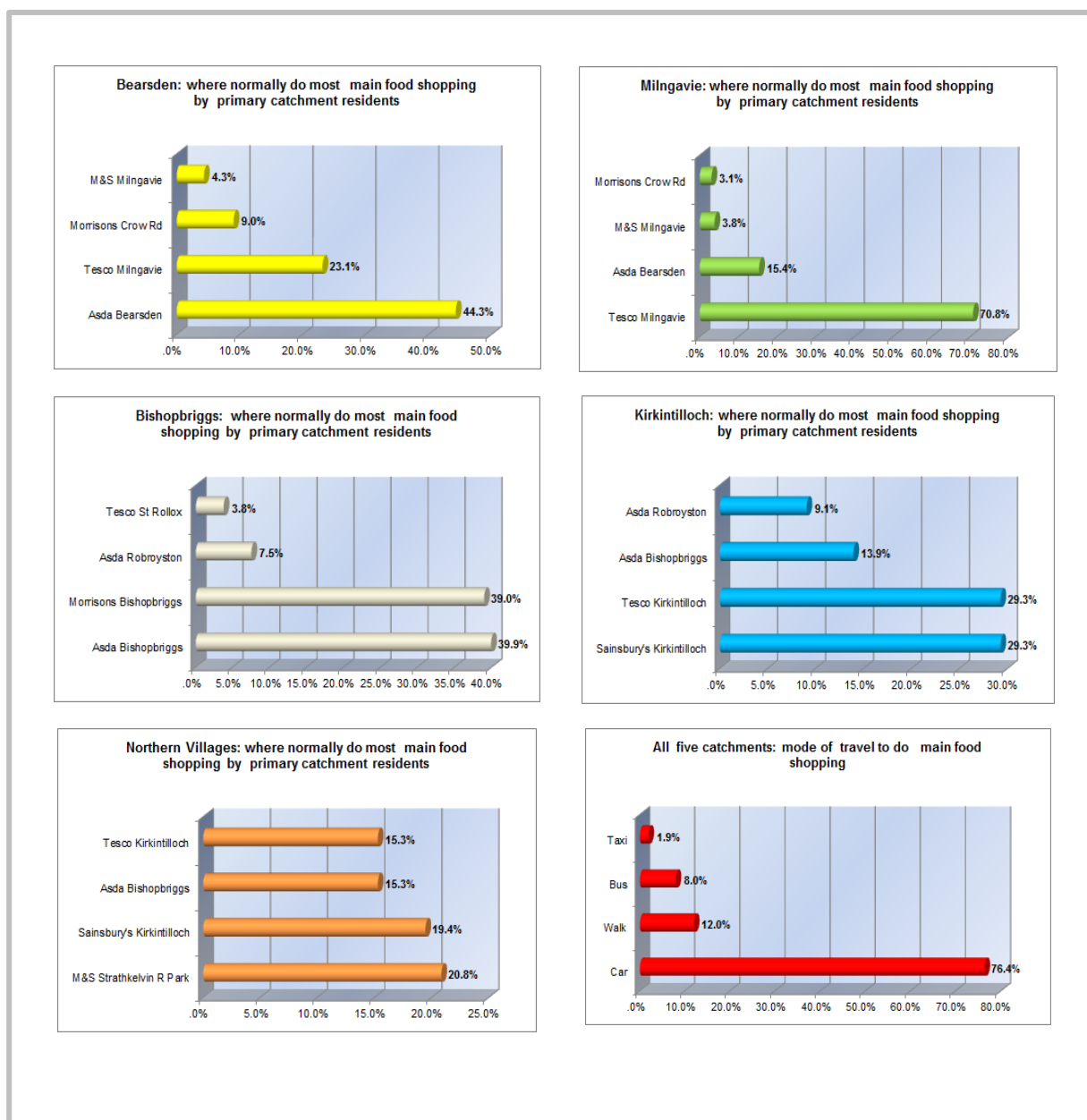
7.4.2 Market shares refer to the proportions of expenditure from residents of a defined area which are spent in that area and in other areas. Table 7.3 shows the convenience market shares for each catchment area. For example, in 2014, 55% of convenience shopping by residents of the Bearsden catchment was retained in that catchment area. Correspondingly, 76% of convenience shopping was retained in the Milngavie catchment, 83% retained the Bishopbriggs catchment and 56% retained in the Kirkintilloch catchment. Only 9% was retained in the Northern Villages catchment.

7.4.3 For East Dunbartonshire, 84% of convenience expenditure was retained in the Council area, leaving 16% leakage. Graphs showing the most visited stores for main food shopping by respondents to the survey are shown in Figure 7.1, reproduced from the 2014 Retail Capacity Assessment for ease of reference. As explained below, they should be regarded with caution for 2019. Use of the car

for main food shopping was the predominant mode of transport.

7.4.4 Since 2014, the development of Waitrose in Milngavie and Lidl in Kirkintilloch, plus the recent arrival of Aldi and Home Bargains in Milngavie will have altered these patterns- see Table 7.10.

Figure 7.1 Main food shopping and mode of travel in 2014



7.5 Convenience expenditure and turnover by catchment area

7.5.1 The relationship between total expenditure and turnover in each retail catchment area is defined at the beginning of this section.

7.5.2 Appendix 3 shows the inflows and outflows of convenience expenditure between the catchment areas and to destinations outside East Dunbartonshire, based on the household survey.

7.5.3 Appendix 4 shows the estimates of convenience expenditure inflows to East Dunbartonshire for each catchment area in 2019, based on the ²National Survey of Local Shopping Patterns 2012 data (NSLSP). The inflows from outside East Dunbartonshire are markedly higher than under the older NSLSP data used in the 2014 Retail Capacity Assessment. Although this information is aging, it does not appear unreasonable in terms of the distribution of inflows, prior to the arrival of Waitrose.

7.5.4 Tables 7.4 to 7.9 show the survey-based convenience expenditure and turnover relationships for each catchment area and for the Council area in total in 2019, with forecasts for 2024 and 2029. The tables include allowance for patterns relating to the new stores in Table 7.10, as explained in Appendix 5.

7.5.5 In the Bearsden catchment, the combined patterns of expenditure in 2019 show an increase in percentage net leakage since the 2014 Study, owing to the attraction to Waitrose/ Aldi/ Home Bargains in Milngavie. The deduced turnover is similar to that in 2013.

7.5.6 In the Milngavie catchment, the net percentage inflow is much higher compared to 2013, for the reasons explained previously. In the Bishopriggs catchment, there is no change in the combined patterns, because higher inflows are offset by greater leakage through trade diversion to Lidl and Waitrose. The deduced turnover is similar to that in 2013.

7.5.7 In the Kirkintilloch catchment, the combined patterns of expenditure in 2019 show a reduction in the percentage net leakage since the 2014 Study, mainly because of Lidl and greater inflows from outside East Dunbartonshire from the NSLSP data. There is no material change in the patterns for the Northern Villages catchment.

7.5.8 For East Dunbartonshire as a whole, the combined patterns of expenditure in 2019 show a net inflow of 12%, compared to a net outflow of -1% in 2013.

7.6 New store developments

7.6.1 New foodstore developments since 2014 Study are shown in Table 7.10, together with their floorspace and estimated convenience turnover. At the time of writing, the Aldi and Home Bargains stores are not open yet but are anticipated to start trading shortly. Therefore, they have been included as operational in 2019 for this study.

7.7 Convenience expenditure and turnover in 2019

7.7.1 The current distribution of convenience floorspace in East Dunbartonshire and in its five catchment areas is shown in Table 7.11. The convenience floorspace data for 2019 has been updated since the 2014 Capacity Assessment. Floorspace for the supermarkets is based on the Council's information. For all other floorspace, the information derives from the Assessors' records in 2019, including street survey checks of occupiers in the town centres for this study.

7.7.2 Average company turnover/ floorspace ratios from the Retail Rankings 2018 are applied to the main supermarkets and discount foodstores, with adjustments to include VAT and remove petrol/ non-retail sales, expressed in 2018 prices. These ratios also embrace recent research published by Mintel on the split of convenience and comparison floorspace among the various operators and the associated division of turnover. Estimated average ratios applied to other shops.

² Only the 2008 NSLSP data was available from the Clydeplan Authority for the 2014 Retail Capacity Study

Table 7.4
Zone 1 Bearsden catchment area- convenience expenditure and turnover (in 2018 prices)

| | % | 2019 £million | 2024 £million | 2029 £million |
|--|------|------------------|------------------|------------------|
| Residents' expenditure potential | | 60.9 | 62.9 | 66.9 |
| Add: inflows from rest of E Dunbartonshire (% in 2014) | 11% | 6.9 | 7.1 | 7.6 |
| inflows from outside E Dunbartonshire | 35% | 21.4 | 22.1 | 23.5 |
| Less: outflows from Zone 1 (% in 2014) | -45% | -27.6 | -28.5 | -30.3 |
| outflows to Milngavie Waitrose/Aldi/ Home Bargains | -12% | -7.3 | -7.5 | -8.0 |
| Retained expenditure (turnover) | | 54.3 | 56.2 | 59.7 |

Note

Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices

Table 7.5
Zone 2 Milngavie catchment area- convenience expenditure and turnover (in 2018 prices)

| | % | 2019 £million | 2024 £million | 2029 £million |
|--|------|------------------|------------------|------------------|
| Residents' expenditure potential | | 30.3 | 31.3 | 33.3 |
| Add: inflows from rest of E Dunbartonshire (% in 2014) | 57% | 17.2 | 17.7 | 18.8 |
| inflows to Waitrose/ Aldi/ H Bargains from rest of E Dunb. | 35% | 10.7 | 11.0 | 11.7 |
| inflows from outside E Dunbartonshire | 64% | 19.5 | 20.1 | 21.4 |
| inflows to Waitrose/ Aldi/ H Bargains from outside E Dunb. | 25% | 7.5 | 7.8 | 8.3 |
| Less: outflows from Zone 2 (% in 2014) | -24% | -7.4 | -7.6 | -8.1 |
| Retained expenditure (turnover) | | 77.8 | 80.4 | 85.4 |

Note

Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices

Table 7.6
Zone 3 Bishopbriggs catchment area- convenience expenditure and turnover (in 2018 prices)

| | % | 2019 £million | 2024 £million | 2029 £million |
|---|------|------------------|------------------|------------------|
| Residents' expenditure potential | | 51.3 | 53.0 | 56.4 |
| Add: inflows from rest of E Dunbartonshire % in 2014) | 52% | 26.7 | 27.6 | 29.3 |
| inflows from outside E Dunbartonshire | 26% | 13.2 | 13.6 | 14.5 |
| Less: outflows from Zone 3 (% in 2014) | -17% | -8.6 | -8.9 | -9.4 |
| outflows to Milngavie Waitrose/Aldi/ Home Bargains | -5% | -2.7 | -2.8 | -3.0 |
| outflows to Lidl, Kirkintilloch | -4% | -2.1 | -2.2 | -2.3 |
| Retained expenditure (turnover) | | 77.8 | 80.4 | 85.5 |

Note

Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices

Table 7.7
Zone 4 Kirkintilloch catchment area- convenience expenditure and turnover (in 2018 prices)

| | % | 2019 £million | 2024 £million | 2029 £million |
|--|------|------------------|------------------|------------------|
| Residents' expenditure potential | | 66.1 | 68.3 | 72.6 |
| Add: inflows from rest of E Dunbartonshire (% in 2014) | 12% | 7.9 | 8.2 | 8.7 |
| inflows to Lidl, Kirkintilloch | 3% | 2.1 | 2.2 | 2.3 |
| inflows from outside E Dunbartonshire | 5% | 3.5 | 3.6 | 3.8 |
| Less: outflows from Zone 4 (% in 2014) | -44% | -29.0 | -29.9 | -31.8 |
| outflows to Milngavie Waitrose/Aldi/ Home Bargains | -1% | -0.7 | -0.7 | -0.7 |
| Retained expenditure (turnover) | | 50.0 | 51.7 | 54.9 |

Note

Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices

Table 7.8
Zone 5 Northern Villages catchment area- convenience expenditure and turnover (in 2018 prices)

| | % | 2019 £million | 2024 £million | 2029 £million |
|--|------|------------------|------------------|------------------|
| Residents' expenditure potential | | 26.2 | 27.0 | 28.7 |
| Add: inflows from rest of E Dunbartonshire (% in 2014) | 0.5% | 0.1 | 0.1 | 0.1 |
| inflows from outside E Dunbartonshire | 0% | | | |
| Less: outflows from Zone 5 (% in 2014) | -91% | -23.8 | -24.6 | -26.2 |
| Retained expenditure (turnover) | | 2.4 | 2.5 | 2.7 |

Note

Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices

Table 7.9
East Dunbartonshire- convenience expenditure and turnover (in 2018 prices)

| | % | 2019 £million | 2024 £million | 2029 £million |
|--|------|------------------|------------------|------------------|
| Residents' expenditure potential | | 234.8 | 242.7 | 258.0 |
| inflows from outside E Dunbartonshire | 25% | 57.5 | 59.5 | 63.2 |
| inflows from outside E Dunb to Waitrose/Aldi/ H Bargains | 3% | 7.5 | 7.8 | 8.3 |
| Less: outflows from E Dunbartonshire (% in 2014) | -16% | -37.6 | -38.8 | -41.3 |
| Retained expenditure (turnover) | | 262.3 | 271.0 | 288.1 |

Note

Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices

Table 7.10
East Dunbartonshire convenience retail developments since 2014 and consents (in 2018 prices)

| | Floorspace sq m | | Av. turnover ratio £/sq m | Turnover £million |
|---|-----------------|-------|---------------------------|-------------------|
| | gross | net | | |
| Stores developed and operational after 2014 Study | | | | |
| Lidl, Kirkintilloch (total 1,644 sq m gross, 1,286 net- 85% conv) | 1,397 | 1,093 | 9,734 | 10.6 |
| Waitrose, Milngavie (total 3,375 sq m gross-85% conv) | 2,869 | 1,975 | 11,432 | 22.6 |
| Current planning consents- development near completion- January 2019 | | | | |
| Main St, Milngavie (West Retail Park) TP/ED/18/0268 | | | | |
| Aldi (Unit 1) | | | | |
| Total 1,751 sq m gross, 1,227 sq m net -80% conv | | 982 | 12,333 | 12.1 |
| Home Bargains (Unit 2) | | | | |
| Total 1,702 sq m gross, 1,228 sq m net -60% conv | | 737 | 8,673 | 6.4 |
| Total | | | | 51.7 |

Note:

Source of gross floorspace totals- Council. Lidl opened in late Nov 2013. Waitrose opened in June 2015

Turnover ratios derive from the Retail Rankings 2018

Consent was granted to extend the Morrisons store in Bishopbriggs, as recorded in Retail Capacity Study 2014. It has not been implemented so it has not been included in this table as the passage of time suggests the situation probably will not change. The company has an interest in an alternative site - Proposal of Application TP/ED/18/0406

7.7.3 Comparison with the survey-based totals (actual turnover) is included for each catchment area in Table 7.11, to indicate where there is any over or under-trading. From the table, the total under-trading in the Council area is at -10%, which is a moderate level.

7.7.4 *Under-trading* does not generally present a good case for additional new floorspace, because the current expenditure does not fully support trading at average levels. On the other hand, *over-trading* at above average levels begins to present a case for consideration of additional retail floorspace.

7.7.5 In the Bearsden catchment, the level of estimated under-trading is significant at -21%. The position has changed since 2014, when there was slight over-trading. Most of the change is caused by the estimated trade diversion to Waitrose, Aldi and Home Bargains in Milngavie and to the much higher average turnover relating to Lidl in 2019, based on the Retail Rankings. The turnover/floorspace ratios for Aldi and Lidl have increased greatly in line with their growing market share in the UK.

7.7.6 In the Milngavie catchment, the expenditure and turnover relationship is almost in balance, with slight under-trading of -4%. The development of Waitrose, Aldi and Home Bargains has added to the inflows and absorbed the over-trading estimated in 2014. In the Bishopbriggs catchment, the expenditure and turnover relationship is pretty well in balance at 1% over-trading, so nothing much has changed since 2014.

7.7.7 In the Kirkintilloch catchment, there is more significant under-trading at -18%, mostly as a consequence of the inclusion of the Lidl store. Estimated under-trading in the Northern Villages catchment is significant at -21%. The convenience floorspace is very small and it is possible that the household survey findings may have under-stated the level of retained expenditure.

7.7.8 On a technical point, there is no widely agreed benchmark for determining any over/ under-trading. Some consultants ignore the subject and rely on the survey-based ratios only. There are material issues related to accuracy at the individual store level and also consistency in the treatment of turnover of new development proposals.

7.8 Convenience planning consents & opportunities

7.8.1 It is a convention that planning consents require to be deducted from forecasts of spare expenditure capacity in retail capacity assessments generally.

7.8.2 Morrisons was granted consent for an extension to their Bishopbriggs store, which was recorded in the 2014 Retail Capacity Assessment. It has never been implemented. There is a recent planning application to redevelop the existing Morrisons store to provide a new superstore and car park TP/ED/19/0186. For this reason, we have not included the original consent in this study as a potential claim against spare capacity, as events make development of the extension appear unlikely. That does not lessen its planning status though.

7.8.3 Otherwise, there are no extant planning consents for convenience floorspace in the Council area, over and above the recent/ new store developments in Table 7.10.

| Table 7.11 East Dunbartonshire convenience floorspace and turnover, 2019 (in 2018 prices) | | | | |
|--|-----------------|---------------|---------------------------|-------------------|
| | Floorspace sq m | | Av. turnover ratio £/sq m | Turnover £million |
| | gross | net | | |
| Zone 1 | | | | |
| Bearsden Town Centre | 1,074 | 708 | | 5.7 |
| M&S Simply Food (total 636 sq m gross) | 636 | 445 | 10,484 | 4.7 |
| Other town centre shops | 438 | 263 | 3,900 | 1.0 |
| (1) ASDA, Milngavie Rd (total 9,535 sq m gross- 60% conv) | 5,721 | 3,433 | 14,168 | 48.6 |
| Lidl, Baljafay (total 894 sq m gross-90% conv) | 805 | 603 | 9,734 | 5.9 |
| Sainsburys' Local | 350 | 263 | 15,906 | 4.2 |
| Other Bearsden out of centre shops | 2,315 | 1,389 | 3,100 | 4.3 |
| Total turnover at average levels | 10,265 | 6,396 | | 68.7 |
| <i>Under-trading</i> | | | -21% | -14.3 |
| Total Zone 1 (actual levels) | | | | 54.3 |
| Zone 2 | | | | |
| Milngavie Town Centre | 6,158 | 3,838 | | 39.1 |
| Tesco- Gavin's Mill Rd (total 5,539 sq m gross 73% conv) | 4,043 | 2,426 | 11,125 | 27.0 |
| M&S Simply Food (total 1,590 sq m gross 90% conv) | 1,431 | 1,002 | 10,484 | 10.5 |
| Other town centre shops | 684 | 410 | 3,900 | 1.6 |
| Waitrose, Milngavie (total 3,375 sq m gross-85% conv) | 2,869 | 1,975 | 11,432 | 22.6 |
| Aldi, W Retail Park | | | | |
| Total 1,751 sq m gross, 1,227 sq m net -80% conv | 1,401 | 982 | 12,333 | 12.1 |
| Home Bargains, West Retail Park | | | | |
| Total 1,702 sq m gross, 1,228 sq m net -60% conv | 1,021 | 737 | 8,673 | 6.4 |
| Other Milngavie out of centre shops | 596 | 358 | 3,100 | 1.1 |
| Total turnover at average levels | 12,045 | 7,890 | | 81.3 |
| <i>Under-trading</i> | | | -4% | -3.5 |
| Total Zone 2 (actual levels) | | | | 77.8 |
| Zone 3 | | | | |
| Bishopriggs Town Centre | 3,717 | 1,887 | | 20.3 |
| Morrisons, The Triangle (3,815 sq m gross-90% conv) | 3,434 | 1,717 | 11,411 | 19.6 |
| Other town centre shops | 283 | 170 | 3,900 | 0.7 |
| ASDA Kirkintilloch Road (total 6,104 sq m gross-70% conv) | 4,273 | 2,564 | 14,168 | 36.3 |
| M&S Simply Food, Strathk R Park (1,880 sq m gross-90% conv) | 1,692 | 1,184 | 10,484 | 12.4 |
| Tesco Express, Kirkintilloch Rd | 329 | 247 | 16,671 | 4.1 |
| Other Bishopriggs out of centre shops | 2,279 | 1,367 | 3,100 | 4.2 |
| Total turnover at average levels | 12,289 | 7,249 | | 77.3 |
| <i>Over-trading</i> | | | 1% | 0.5 |
| Total Zone 3 (actual levels) | | | | 77.8 |
| Zone 4 | | | | |
| Kirkintilloch Town Centre | 7,143 | 4,286 | | 44.0 |
| Tesco- Regent Centre (total 3,012 sq m gross-95% conv) | 2,861 | 1,717 | 11,125 | 19.1 |
| Sainsbury's, Shamrock St (total 3,668 sq m gross 85% conv) | 3,118 | 1,871 | 11,853 | 22.2 |
| Other town centre shops | 1,164 | 698 | 3,900 | 2.7 |
| Lidl, Milton Rd, Kirkintilloch (total 1,644 sq m gross- 85% conv) | 1,397 | 1,093 | 9,734 | 10.6 |
| Other Kirkintilloch out of centre shops | 1,933 | 1,160 | 3,100 | 3.6 |
| Lenzie | 1,358 | 815 | 3,100 | 2.5 |
| Twechar | 131 | 79 | 3,100 | 0.2 |
| Total turnover at average levels | 11,963 | 7,432 | | 61.0 |
| <i>Under-trading</i> | | | -18% | -11.0 |
| Total Zone 4 (actual levels) | | | | 50.0 |
| Zone 5 | | | | |
| Lennoxtown | 584 | 350 | 3,100 | 1.1 |
| Milton of Campsie | 412 | 247 | 3,100 | 0.8 |
| Torrance | 669 | 401 | 3,100 | 1.2 |
| Total turnover at average levels | 1,665 | 999 | | 3.1 |
| <i>Under-trading</i> | | | -21% | -0.6 |
| Total Zone 5 (actual levels) | | | | 2.4 |
| Total East Dunbartonshire | 48,227 | 29,965 | | 291.4 |
| <i>Under-trading</i> | | | -10% | -29.1 |
| Total (actual levels) | | | | 262.3 |
| Note Gross floorspace for supermarkets provided by the Council, plus all other floorspace based on the Assessors records, updated to 2019, plus street surveys of the town centres for this study. (1) The total gross floorspace of ASDA is 11,246 sq m (Assessor). In this table, the loading bay area (1,711 sq m) has been excluded. Net floorspace- estimates by R MacLean. | | | | |

8 Convenience expenditure capacity

8.1 Introduction

8.1.1 This section provides estimates of the spare convenience retail expenditure capacity that could service new retail floorspace in East Dunbartonshire, including each of the five convenience catchment areas. The forecasts of spare capacity are for the periods 2019-24, 2025-29 and for the total ten-year period 2019-29.

8.2 Definition

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

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

8.2.2 A range of spare capacity can be prepared from these components, showing a low and a high estimate. Planning commitments are normally deducted, but there are none in this case.

8.2.3 The **low estimate** includes any over-trading and the forecast growth in expenditure in the catchment areas over the target periods. The **high estimate** also includes the potential to claw back leakage and attract new trade into the sub areas. Provision of a range of spare capacity normally reduces the need for sensitivity tests. However, the high estimate cannot reasonably be applied in East Dunbartonshire, as explained in the following paragraphs.

8.2.4 'Acceptable' levels of retail impact refer to the situation where new developments would not threaten the vitality and viability of established centres. By convention, this aspect is not usually embraced into capacity studies, because it is normally addressed by retail impact assessments in support of specific retail planning applications. The Council would then assess whether the retail impacts are

'acceptable' in terms of their effects on the vitality and viability of town centres.

8.3 Spare convenience expenditure capacity

8.3.1 Tables 8.1 to 8.6 show the forecast spare convenience expenditure for each of the five catchment areas and for the Council area in total. The tables only include capacity defined at the low end of the range. For estimates at the high end of the range to apply, there would have to be potential to accommodate a large supermarket or superstore which would be capable of reducing leakage and attracting significant trade from beyond the catchment areas. The market for development of additional large supermarkets has extinguished.

8.3.2 There is no forecast spare convenience capacity over the next ten years in the catchment areas of Bearsden, Kirkintilloch and the Northern Villages.

8.3.3 Low levels of spare capacity are forecast for the catchment areas of Milngavie and Bishopbriggs. It could potentially service small shop developments or extensions in these catchment areas. Since the levels of forecast expenditure capacity are low and the average turnover/floorspace ratios of supermarkets are high, we have not shown estimates of equivalent retail floorspace.

8.3.4 In Bishopbriggs, the spare capacity could potentially service modestly expanded supermarket floorspace, or a discount foodstore, for example, allowing for some trade diversion on other stores in that catchment.

8.3.5 Where relevant, new convenience retail developments will require to be justified against planning policies on town centres and the network of centres through the sequential test, including retail impact assessments.

| Table 8.1 Bearsden catchment: forecast spare convenience expenditure capacity (in 2018 prices) | | | |
|---|---------------------|---------------------|---------------------|
| | 2019-24 £million | 2024-29 £million | 2019-29 £million |
| (a) Current under-trading (Table 7.11) | -14.3 | | -14.3 |
| (b) Growth in retained expenditure (turnover)- Table 7.4 | 1.8 | 3.5 | 5.4 |
| (c) Less planning commitments: | 0 | | 0 |
| Spare capacity (a+b-c) | -12.5 | 3.5 | -9.0 |
| Note: figures are rounded | | | |

| Table 8.2 Milngavie catchment: forecast spare convenience expenditure capacity (in 2018 prices) | | | |
|--|---------------------|---------------------|---------------------|
| | 2019-24 £million | 2024-29 £million | 2019-29 £million |
| (a) Current under-trading (Table 7.11) | -3.5 | | -3.5 |
| (b) Growth in retained expenditure (turnover)- Table 7.5 | 2.6 | 5.1 | 7.7 |
| (c) Less planning commitments: | 0 | | 0 |
| Spare capacity (a+b-c) | -0.9 | 5.1 | 4.2 |
| Note: figures are rounded | | | |

| Table 8.3 Bishopbriggs catchment: forecast spare convenience expenditure capacity (in 2018 prices) | | | |
|---|---------------------|---------------------|---------------------|
| | 2019-24 £million | 2024-29 £million | 2019-29 £million |
| (a) Current over-trading (Table 7.11) | 0.5 | | 0.5 |
| (b) Growth in retained expenditure (turnover)- Table 7.6 | 2.6 | 5.1 | 7.7 |
| (c) Less planning commitments: | 0 | | 0 |
| Spare capacity (a+b-c) | 3.1 | 5.1 | 8.1 |
| Note: figures are rounded | | | |

| Table 8.4 Kirkintilloch catchment: forecast spare convenience expenditure capacity (in 2018 prices) | | | |
|--|---------------------|---------------------|---------------------|
| | 2019-24 £million | 2024-29 £million | 2019-29 £million |
| (a) Current under-trading (Table 7.11) | -11.0 | | -11.0 |
| (b) Growth in retained expenditure (turnover)- Table 7.7 | 1.7 | 3.3 | 4.9 |
| (c) Less planning commitments: | 0 | | 0 |
| Spare capacity (a+b-c) | -9.4 | 3.3 | -6.1 |
| Note: figures are rounded | | | |

| Table 8.5 Northern Villages catchment: forecast spare convenience expenditure capacity (in 2018 prices) | | | |
|--|---------------------|---------------------|---------------------|
| | 2019-24 £million | 2024-29 £million | 2019-29 £million |
| (a) Current under-trading (Table 7.11) | -0.6 | | -0.6 |
| (b) Growth in retained expenditure (turnover)- Table 7.8 | 0.1 | 0.2 | 0.2 |
| (c) Less planning commitments: | 0 | | 0 |
| Spare capacity (a+b-c) | -0.6 | 0.2 | -0.4 |
| Note: figures are rounded | | | |

| Table 8.6 East Dunbartonshire: forecast spare convenience expenditure capacity (in 2018 prices) | | | |
|--|---------------------|---------------------|---------------------|
| | 2019-24 £million | 2024-29 £million | 2019-29 £million |
| (a) Current under-trading (Table 7.11) | -29.1 | | -29.1 |
| (b) Growth in retained expenditure (turnover)- Table 7.8 | 8.8 | 17.1 | 25.9 |
| (c) Less planning commitments: | 0 | | 0 |
| Spare capacity (a+b-c) | -20.4 | 17.1 | -3.3 |
| Note: figures are rounded | | | |

9 Comparison expenditure and turnover

9.1 Introduction

9.1.1 This section sets out the comparison expenditure and turnover relationships for East Dunbartonshire and provides forecasts of spare capacity from 2019-24, 2025-29 and the ten-year period 2019 - 2029. The analysis covers the two comparison catchment areas defined in section 2, which are: Bearsden & Milngavie and Bishopbriggs/ Kirkintilloch and the Northern Villages.

9.1.2 As for convenience expenditure, distribution of the turnover among the various towns and Strathkelvin Retail Park is controlled to the total deduced turnover of the two catchment areas from the shopping patterns from the household survey underpinning the 2014 Retail Capacity Assessment.

9.2 Comparison goods-definition

9.2.1 Comparison goods include:

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

9.2.2 This definition is provided in Pitney Bowes' *Retail Expenditure Guide 2018-19*, based on ONS classifications.

9.2.3 '*Bulky goods*' is a collective sub category of comparison goods. These include at least furniture/ floorcoverings large domestic appliances and DIY/hardware (Pitney Bowes). Definitions by retail research agencies vary. There is no precise way of comprehensively identifying all bulky goods retail floorspace in any study area. While bulky goods are normally found in retail parks, they are also important to many town centres.

9.3 Comparison expenditure potential and the internet

9.3.1 Table 9.1 shows the forecast expenditure per capita data for East Dunbartonshire, based on data commissioned from Pitney Bowes for this study. The average annual forecast compound growth rate is 3.11% for the ten year period 2019-29 from that data, which also relates to the socio economic structure in the Council area.

9.3.2 As explained in section 7, special forms of trading (SFT), which is mostly internet shopping, but includes mail order, is removed from the expenditure per capita data, so that it relates to conventional shop floorspace. The proportion of SFT, or non-store sales, is projected to increase up to 2029.

9.3.3 For comparison expenditure, the proportions of SFT are based on the forecasts by Pitney Bowes, as explained in Table 9.1. The current proportion of SFT is estimated at 23.5%, increasing to 30.2%, based on UK projections, adjusted to allow for some store-based internet sales. These forecasts reveal the high proportion of comparison goods sold online.

9.3.4 Forecasts of the total comparison expenditure potential of the residents of each catchment area are shown in Table 9.2. The growth rate to 2029 is the result of combining projected population growth with the forecast growth in expenditure per capita.

Table 9.1
East Dunbartonshire comparison expenditure per capita (in 2018 prices)

| 2019 | 2024 | 2029 |
|--|-------|-------|
| £ | £ | £ |
| 3,731 | 4,272 | 5,069 |
| <i>*excluding special forms of trading</i> | | |
| 2,854 | 3,092 | 3,540 |

Note

Original comparison expenditure per capita data provided by Pitney Bowes in their Geolnsight report 2019 for this study was in 2017 prices, including the projections, as shown below.

| | | |
|--------|--------|--------|
| £3,666 | £4,198 | £4,981 |
|--------|--------|--------|

These have been converted to 2018 prices from Pitney Bowes Retail Expenditure Guide 2018/19, Table 3.1- factor of 1.0176

Comparison expenditure per capita growth rates *per annum* for East Dunbartonshire are:

| | |
|-----------|-----------|
| 2019-2024 | 2024-2029 |
| 2.7% | 3.5% |

*The proportion of spending relating to Special Forms of Trading (SFT) requires to be deducted from data, so that it relates to retail floorspace. Most SFT comprises internet spending. Pitney Bowes publishes estimates of the proportions of SFT for the UK.

Proportions in Pitney Bowes Retail Expenditure Guide 2018/19, Table 3.4:

| | | |
|--------|--------|--------|
| -26.1% | -30.7% | -33.5% |
|--------|--------|--------|

Pitney Bowes also advise that not all the forecast allowance for SFT should be deducted from expenditure, as there is some overlap between non-store based sales and store-related internet sales. They say that the extent of the overlap is unknown. For this study, we estimate a 10% reduction in the Pitney Bowes to acknowledge the issue.

Proportions applied in this study (10% less than the above figures)

| | | |
|--------|--------|--------|
| -23.5% | -27.6% | -30.2% |
|--------|--------|--------|

Table 9.2
East Dunbartonshire residents' comparison expenditure potential (in 2018 prices)

| Excluding SFT (special forms of trading) | 2019 £ million | growth 2019-24 £ million | 2024 £ million | growth 2024-29 £ million | 2029 £ million |
|--|-------------------|--------------------------------|-------------------|--------------------------------|-------------------|
| Comparison catchment areas | | | | | |
| Bearsden & Milngavie (Zones 1 & 2) | 120.9 | 13.1 | 134.0 | 23.0 | 157.0 |
| Bishopbriggs/ Kirkintilloch/ N Villages (Zones 3,4 & 5) | 190.3 | 20.7 | 211.0 | 36.1 | 247.1 |
| East Dunbartonshire -total | 311.2 | 33.8 | 345.0 | 59.1 | 404.1 |
| <p>Note</p> <p>From Tables 2.2 and 9.1. Figures are rounded.</p> | | | | | |

9.4 Comparison shopping patterns- market shares

9.4.1 Information on comparison shopping patterns by catchment area was collected by the household survey by *RMG: Clarity* which underpinned the 2014 Retail Capacity Assessment. The method is the same as for convenience shopping.

9.4.2 The list of questions is provided in Appendix 2. For each of the five categories of comparison goods in the questionnaire, the respondents were asked to *identify where they*

visited most often to buy these goods (Q5-a,b,c,d,e.). The results were weighted and combined to reveal the shopping patterns for all comparison goods shown in Table 9.3- modified for 2019.

9.4.3 Note that the proportions in Table 9.3 exclude SFT (internet/ mail order), in order to show physical destinations only and to achieve compatibility with the expenditure per capita data, which excludes SFT. Thus, the table highlights the shopping patterns between the catchment areas and with centres outside East Dunbartonshire.

Table 9.3
Shopping patterns for comparison goods by residents of East Dunbartonshire- based on
the household survey for the 2014 Retail Capacity Assessment- *modified*

| | Origin of shoppers | | Total East Dunbartonshire |
|--|-----------------------------------|---|------------------------------|
| | Bearsden & Milngavie catchment | Bishopbriggs, Kirkintilloch & N Villages catchment | |
| Destination | | | |
| Bearsden & Milngavie | 31% | 0% | 12% |
| Bishopbriggs & Kirkintilloch | 4% | 64% | 41% |
| Outside E Dunbartonshire | 65% | 36% | 47% |
| Total | 100% | 100% | 100% |
| <p>Note</p> <p>Based on the household survey results: shopping for-clothing & footwear, furniture/ furnishings, domestic appliances, DIY and personal goods weighted to show all comparison goods. The results were filtered to remove don't knows, varies, internet and mail order.</p> <p>The survey patterns for all comparison shopping have been adjusted since the 2014 Retail Capacity Assessment, to reduce estimated outflows from the Bishopbriggs, Kirkintilloch & Northern Villages catchment in 2019. Explanation is provided in the text.</p> <p>It pre-dates the development of Waitrose, Aldi/Home Bargains in Milngavie and Lidl in Kirkintilloch</p> | | | |

9.4.4 Compared to the 2014 Retail Capacity Assessment, the proportion of retained expenditure in the Bishopbriggs/ Kirkintilloch and N Villages catchment in Table 9.3 is estimated to be higher in 2019, because of the larger turnover associated with Strathkelvin Retail Park, where the updated turnover/ floorspace ratios are much higher in some cases. There is no reason to suppose that the companies are trading at any lower than average level now.

9.4.5 Table 9.3 shows that 31% of the residents from the Bearsden/ Milngavie catchment do their comparison shopping locally, with only 4% visiting Bishopbriggs and Kirkintilloch. The balance of 65% do their main comparison goods shopping outside East Dunbartonshire, mainly in Glasgow. In the Bishopbriggs/ Kirkintilloch/ Northern Villages catchment, 64% shop locally, and the rest (36%) go to centres outside East Dunbartonshire, mainly to Glasgow. The proportion visiting Bearsden and Milngavie is insignificant.

9.4.6 More detail on the most frequently visited centres, retail parks and stores from the 2014 household survey is illustrated by the graphs in Figure 9.1, reproduced from the 2014 Capacity Assessment for ease of reference.

9.4.7 Since 2014, the development of Waitrose in Milngavie and Lidl in Kirkintilloch, plus the recent arrival of Aldi and Home Bargains in Milngavie will have caused minor alterations to these patterns, associated with their comparison floorspace components- see Table 9.7.

9.5 Comparison expenditure and turnover by catchment area

9.5.1 Like the analysis in section 7, the relationship between total expenditure and turnover in each catchment area is defined simply as: residents' expenditure potential plus inflows, less outflows equals total turnover.

9.5.2 Appendix 6 shows the inflows and outflows of comparison expenditure between the catchment areas and to destinations outside East Dunbartonshire, based on the household survey (modified).

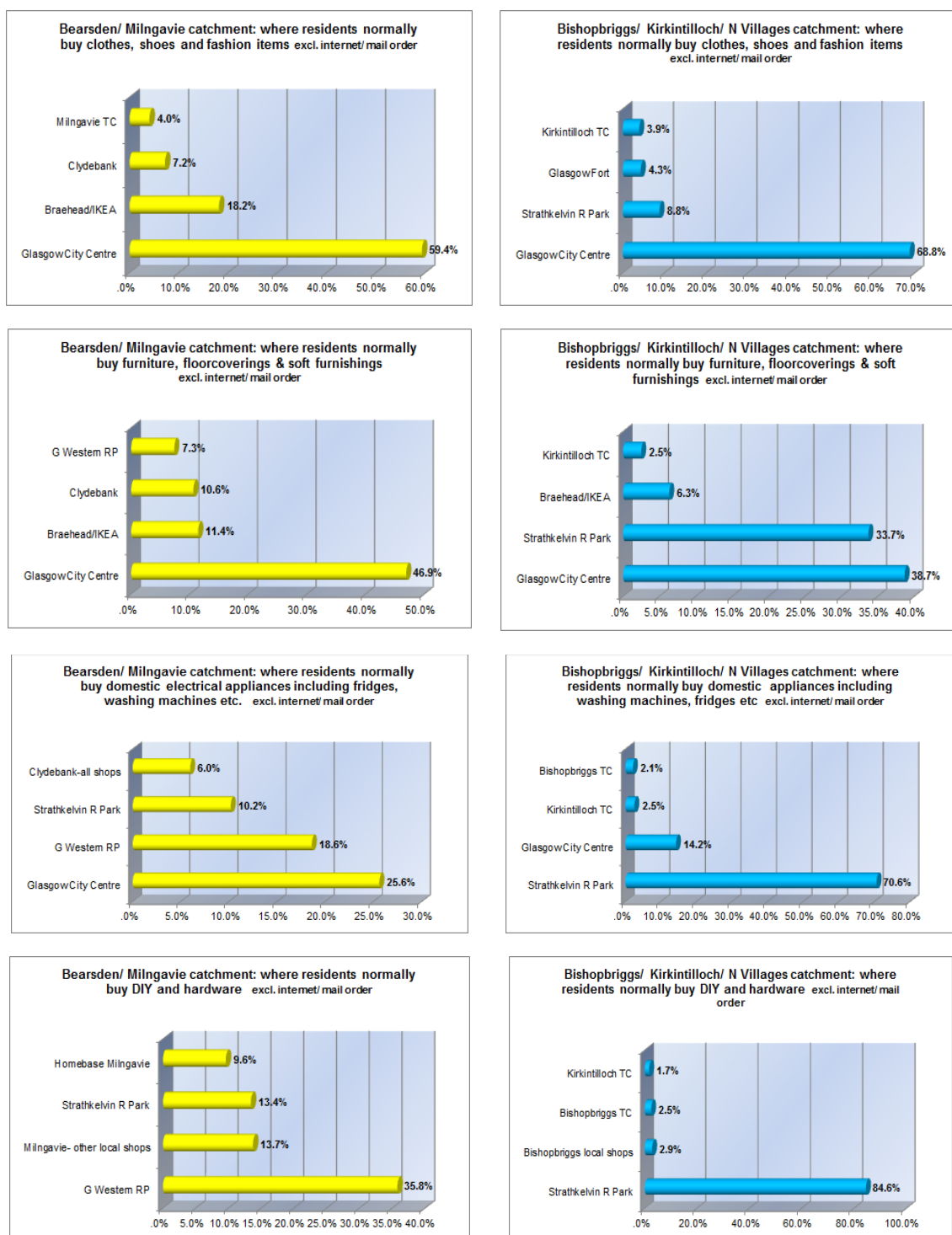
9.5.3 Appendix 7 shows the estimates of comparison expenditure inflows to East Dunbartonshire for each catchment area in 2019, based on the ³National Survey of Local Shopping Patterns 2012 data (NSLSP). The levels of inflow are low.

³ Only the 2008 NSLSP data was available from the Clydeplan Authority for the 2014 Retail Capacity Study

9.5.4 Tables 9.4 to 9.6 show the survey-based comparison expenditure and turnover relationships for each catchment area and for the Council area in total in 2019, with forecasts for 2024 and 2029. The tables include

allowance for patterns relating to the new stores in Table 9.7, as explained in Appendix 8.

Main destinations for comparison goods shopping



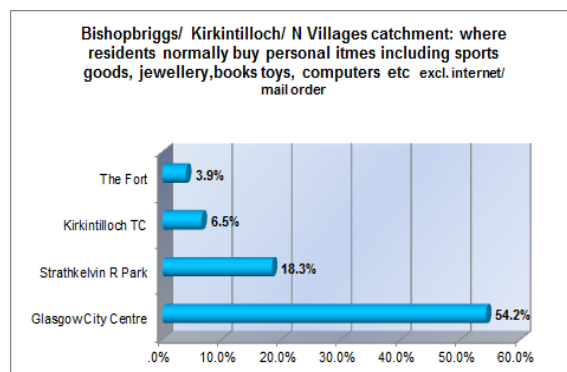
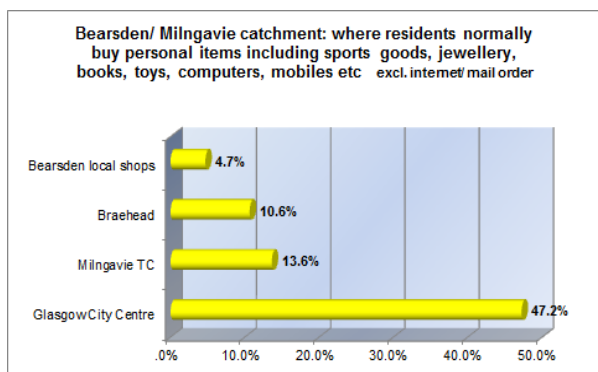


Table 9.4
Bearsden & Milngavie catchment area- comparison expenditure and turnover (in 2018 prices)

| | % | 2019 £million | 2024 £million | 2029 £million |
|--|------|------------------|------------------|------------------|
| Residents' expenditure potential | | 120.9 | 134.0 | 157.0 |
| Add: inflows from rest of E Dunbartonshire (% in 2014) | 0% | | | |
| inflows to Waitrose/ Aldi/ H Bargains from rest of E Dunb. | 0.3% | 0.4 | 0.4 | 0.5 |
| inflows from outside E Dunbartonshire | 3% | 4.0 | 4.4 | 5.2 |
| inflows to Waitrose/ Aldi/ H Bargains from outside E Dunb. | 4% | 4.3 | 4.8 | 5.6 |
| Less: outflows from Bearsden & Milngavie (% in 2014) | -69% | -83.4 | -92.5 | -108.3 |
| Retained expenditure (turnover) | | 46.1 | 51.1 | 59.9 |

Note

Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices

Table 9.5
Bishopbriggs, Kirkintilloch & Northern Villages catchment area- comparison expenditure and turnover (in 2018 prices)

| | % | 2019 £million | 2024 £million | 2029 £million |
|--|------|------------------|------------------|------------------|
| Residents' expenditure potential | | 190.3 | 211.0 | 247.1 |
| Add: inflows from rest of E Dunbartonshire % in 2014) | 4% | 7.6 | 8.4 | 9.9 |
| inflows to Lidl from rest of E Dunbartonshire | 0% | | | |
| inflows from outside E Dunbartonshire | 2% | 3.1 | 3.4 | 4.0 |
| inflows to Lidl from outside E Dunbartonshire | 0.3% | 0.5 | 0.6 | 0.7 |
| *Less: outflows from Bishopbriggs, Kirkintilloch & Northern Villages (% adjusted since 2014) | -36% | -68.5 | -75.9 | -89.0 |
| outflows to Milngavie Waitrose/Aldi/ Home Bargains | -2% | -4.3 | -4.8 | -5.6 |
| Retained expenditure (turnover) | | 128.7 | 142.7 | 167.1 |

Note

Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices

* Estimated outflows reduced for 2019, compared to the 2014 Retail Capacity Assessment

Table 9.6
East Dunbartonshire- comparison expenditure and turnover (in 2018 prices)

| | % | 2019 £million | 2024 £million | 2029 £million |
|---|--------|------------------|------------------|------------------|
| Residents' expenditure potential | | 311.2 | 345.0 | 404.1 |
| inflows from outside E Dunbartonshire | 2.3% | 7.1 | 7.8 | 9.2 |
| inflows from outside E Dunb to Waitrose/Aldi/ H Bargains and Lidl | 1.5% | 4.8 | 5.3 | 6.2 |
| Less: outflows from E Dunbartonshire (% adjusted since 2014) | -47.6% | -148.2 | -164.3 | -192.5 |
| Retained expenditure (turnover) | | 174.8 | 193.8 | 227.0 |

Note

Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices

Table 9.7
East Dunbartonshire comparison retail developments since 2014 and consents (in 2018 prices)

| | Floorspace sq m | | Av. turnover ratio £/sq m | Turnover £million |
|--|-----------------|-------|---------------------------|-------------------|
| | gross | net | | |
| Stores developed and operational after 2014 Study | | | | |
| Lidl, Kirkintilloch (total 1,644 sq m gross, 1,286 net- 85% conv) | 247 | 193 | 5,806 | 1.1 |
| Waitrose, Milngavie (total 3,375 sq m gross-15% comp) | 506 | 348 | 4,599 | 1.6 |
| Current planning consents- development near completion- February 2019 | | | | |
| Main St, Milngavie (West Retail Park) TP/ED/18/0268 | | | | |
| Aldi (Unit 1) | | | | |
| Total 1,751 sq m gross, 1,227 sq m net -20% comp | | 245 | 6,634 | 1.6 |
| Home Bargains (Unit 2) | | | | |
| Total 1,702 sq m gross, 1,228 sq m net -40% comp | | 491 | 8,673 | 4.3 |
| Sub total | | | | 8.6 |
| Current planning consents- no development yet February 2019 | | | | |
| B&Q Strathkelvin Retail Park TP/ED/15/0310- mezzanine | 2,787 | 2,230 | 2,362 | 5.3 |
| Grand Total | | | | 13.9 |

Note:

Source of gross floorspace totals- Council. Lidl opened in late Nov 2013. Waitrose opened in June 2015

Turnover ratios derive from the Retail Rankings 2018

9.5.5 For the Bearsden & Milngavie catchment, inflows have increased slightly since 2014 because of the new store developments. For the Bishopbriggs/ Kirkintilloch & Northern Villages catchment, inflows are lower. For East Dunbartonshire as a whole, outflows have reduced since 2014 and inflows increased very slightly.

9.6 New store developments and consents

9.6.1 The comparison floorspace associated with the new supermarket/ mixed store developments is shown in Table 9.7. There is planning consent for a mezzanine floor in B&Q at Strathkelvin Retail Park (2015), but it has not been developed to date.

9.7 Comparison floorspace and turnover 2019

9.7.1 The distribution of comparison floorspace in East Dunbartonshire and in its two comparison catchment areas is shown in Table 9.8 . As for convenience floorspace, the comparison floorspace data for 2019 has been updated since the 2014 Retail Capacity Assessment. Floorspace for the supermarkets is based on the Council's information. For all other floorspace, the information derives from the Assessors' records in 2019, including street survey checks of occupiers in the town centres for this study.

Table 9.8
East Dunbartonshire comparison floorspace and turnover, 2019 (in 2018 prices)

| Bearsden/Milngavie catchment | Floorspace sq m | | Av. turnover ratio £/sq m | Turnover £million |
|---|-----------------|--------|---------------------------|-------------------|
| | gross | net | | |
| Bearsden Town Centre | 1,093 | 656 | 4,734 | 3.1 |
| ASDA, Milngavie Rd (total 9,535 sq m gross- 40% comp) | 3,814 | 2,288 | 5,526 | 12.6 |
| Lidl, Baljafray (total 894 sq m gross-10% comp) | 89 | 67 | 5,806 | 0.4 |
| Other Bearsden out of centre shops | 1,306 | 784 | 3,314 | 2.6 |
| | | | | |
| Milngavie Town Centre | 6,010 | 3,622 | | 18.7 |
| Tesco- Gavin's Mill Rd (total 5,539 sq m gross 27% comp) | 1,496 | 897 | 6,500 | 5.8 |
| M&S Simply Food (total 1,590 sq m gross 10% comp) | 159 | 111 | 4,853 | 0.5 |
| Other town centre shops | 4,356 | 2,614 | 4,734 | 12.4 |
| Waitrose, Milngavie (total 3,375 sq m gross-15% comp) | 506 | 348 | 4,599 | 1.6 |
| Aldi, W Retail Park | | | | |
| Total 1,751 sq m gross, 1,227 sq m net -20%comp | 350 | 245 | 6,634 | 1.6 |
| Home Bargains, West Retail Park | | | | |
| Total 1,702 sq m gross, 1,228 sq m net -40% comp | 681 | 491 | 8,673 | 4.3 |
| Other Milngavie out of centre shops | 583 | 350 | 3,314 | 1.2 |
| Total comparison catchment | 14,433 | 8,851 | | 46.1 |
| | | | | |
| Bishopriggs, Kirkintilloch, N Villages catchment | | | | |
| | | | | |
| Bishopriggs Town Centre | 1,770 | 1,024 | | 3.9 |
| Morrisons, The Triangle (3,815 sq m gross-10% comp) | 382 | 191 | 3,747 | 0.7 |
| Other town centre shops | 1,389 | 833 | 3,768 | 3.1 |
| ASDA Kirkintilloch Road (total 6,104 sq m gross-30% comp) | 1,831 | 1,099 | 5,526 | 6.1 |
| M&S Simply Food, Strathk R Park (1,880 sq m gross-10% comp) | 188 | 132 | 4,853 | 0.6 |
| Strathkelvin Retail Park- excl M&S | 25,077 | 19,221 | | 82.2 |
| Other Bishopriggs out of centre shops | 2,387 | 1,432 | 2,512 | 3.6 |
| | | | | |
| Kirkintilloch Town Centre | 10,907 | 6,544 | | 27.1 |
| Tesco- Regent Centre (total 3,012 sq m gross-5% comp) | 151 | 90 | 6,500 | 0.6 |
| Sainsbury's, Shamrock St (total 3,668 sq m gross 15% comp) | 550 | 330 | 2,671 | 0.9 |
| Other town centre shops | 10,206 | 6,123 | 4,187 | 25.6 |
| Lidl, Milton Rd, Kirkintilloch (total 1,644 sq m gross- 15% comp) | 247 | 193 | 5,806 | 1.1 |
| Other Kirkintilloch out of centre shops | 1,471 | 883 | 2,512 | 2.2 |
| Lenzie | 165 | 99 | 2,512 | 0.2 |
| Twechar | 438 | 263 | 2,512 | 0.7 |
| | | | | |
| Northern Villages | | | | |
| Lennoxtown | 276 | 166 | 2,512 | 0.4 |
| Milton of Campsie | 161 | 96 | 2,512 | 0.2 |
| Torrance | 209 | 125 | 2,512 | 0.3 |
| Total comparison catchment | 45,127 | 31,276 | | 128.7 |
| | | | | |
| Total East Dunbartonshire | 59,560 | 40,127 | | 174.8 |

Note

Gross floorspace for supermarkets provided by the Council, plus all other floorspace based on the Assessors records, updated to 2019, plus street surveys of the town centres for this study.

(1) The total gross floorspace of ASDA is 11,246 sq m (Assessor). In this table, the loading bay area (1,711 sq m) has been excluded. Net floorspace- estimates by R MacLean.

9.7.2 Average company turnover/ floorspace ratios from the Retail Rankings 2018 are applied to the main supermarkets and discount foodstores, with adjustments to include VAT and remove petrol/ non-retail sales, expressed in 2018 prices. These ratios also embrace recent research published by Mintel on the split of convenience and comparison floorspace among the various operators and the associated division of turnover. Estimated average ratios are applied to other shops.

9.7.3 Unlike convenience retailing, comparison retailing is not dominated by a few participants, so the concept of over/ under-trading has limited application for comparison retailing and is not included here.

9.7.4 A list of the comparison goods retailers in Strathkelvin Retail Park is provided in Appendix 9

10 Comparison expenditure capacity

10.1 Introduction

10.1.1 As explained at the beginning of section 8, the planning context for defining spare capacity is the level of new retail development that can be accommodated without threatening the vitality and viability of established town centres. Spare retail capacity can exist in the following forms, as previously explained:

- Over-trading (not usually relevant for comparison retail capacity- see text below)
- Growth in retained expenditure (turnover)
- Potential to claw back expenditure leakage
- Potential to attract new trade into the area
- 'Acceptable' levels of impact- see section 7

10.1.2 A forecast range of estimated spare capacity is provided for comparison expenditure in this section, with a high and a low estimate for both the catchment areas. Notional equivalent net retail floorspace figures have been provided for guidance.

10.2 Spare comparison expenditure capacity

10.2.1 Over-trading above average levels is generally less of an issue in comparison retailing, because the sector is not dominated by a few major players, such as in the convenience sector.

10.2.2 Forecast growth in retained expenditure (turnover) in the retail catchment areas is substantial to 2029 (Tables 9.4 and 9.5), but most of this in the period 2024-29. It offers the principal source of spare capacity to support additional comparison retail floorspace. However, it is also probable that a significant amount of the forecast expenditure growth will materialise as internet-based retail spending.

10.2.3 There are high levels of comparison expenditure outflows from East Dunbartonshire to Glasgow City Centre and to other shopping centres and retail parks (as indicated in the graphs). At the same time, the trend is for increasing concentration of multiple retailer market interest in the largest centres, including Glasgow City Centre.

10.2.4 Given the proximity of Glasgow to East Dunbartonshire, the prospects of clawing back significant comparison expenditure leakage appear limited.

10.2.5 So, the approach adopted to calculate spare convenience capacity in section 8 is better modified to bring the comparison expenditure capacity forecasts for East Dunbartonshire closer to the direction of the retail development market.

10.2.6 For the *high estimate*, the forecast expenditure growth alone is assumed, as there is little relevance in adding potential to claw back leakage when the prospects of achieving it at any significant level appear limited.

10.2.7 For the *low estimate*, a higher rate of growth in the proportion of SFT (mainly internet spending) has been assumed. There is great uncertainty over the future rate of growth in internet retail spending, so it is reasonable to include a variant in this key factor to provide a range of forecasts. All the evidence is that the proportion of internet retail spending increasing, and there is no reason to suppose why that direction will change over the next few years.

10.2.8 It should be noted that, simply having a low estimate, whether by increased internet spending or by increased expenditure leakage from the Council area, is entirely appropriate, given our comments on retail market trends for comparison goods sales.

10.2.9 More weight should be given to the expenditure capacity figures than the equivalent retail floorspace, because retailer performance and formats varies widely. In this report, town centre turnover/ floorspace ratios have been applied to estimate the equivalent floorspace. Where lower turnover/ floorspace ratios are applied, there would be more equivalent floorspace.

10.2.10 Forecasts beyond 2024 should be viewed with caution, because of the greater uncertainties.

10.2.11 **High estimates-** Tables 10.1 to 10.3 show the forecast spare comparison expenditure for each of the two comparison retail catchment areas and for the Council area

in total, up to 2024 and 2029, after deducting turnover relating to existing planning consents. The broadly-estimated net floorspace equivalents relate to those in the main town centres in each retail catchment area.

10.2.12 In the *Bearsden & Milngavie catchment*, the forecast spare capacity up to 2029 at the high end of the range is £13.8 million, with equivalent retail floorspace of 2,400 sq m net. However, there is little spare capacity up to 2024.

10.2.13 In the *Bishopbriggs, Kirkintilloch & Northern Villages catchment*, the forecast capacity is up to £33.1 million, with equivalent retail floorspace of 6,400 sq m net.

10.2.14 For the Council area as a whole, the combined capacity is up to £46.9 million, with equivalent retail floorspace of 8,800 sq m net.

10.2.15 **Low estimates-** the forecast spare comparison capacity at the low end of the range is based on Tables A, B and C in Appendix 10.

10.2.16 In Table A, the higher level of SFT (mainly internet expenditure) has been raised to 36% in 2029, instead of 30.2% in the high estimate.

10.2.17 Under the low estimates, the forecast spare capacity in the *Bearsden & Milngavie catchment* would be £8.8 million by 2019. In the *Bishopbriggs, Kirkintilloch & Northern Villages catchment*, the forecast spare capacity would be £19.2 million by 2029. For the Council area in total, it would be £27.9 million.

10.3 Interpretation

10.3.1 As stated earlier in this report, forecast retail capacity is a broad-brush exercise. New retail developments will also be partly serviced by trade diversion from existing stores and centres, which is a factor not included in retail capacity studies generally.

10.3.2 In the *Bearsden & Milngavie catchment*, the forecast spare comparison expenditure capacity is very modest over the next ten years, under both the high and the low forecasts. It could support small amounts of additional comparison floorspace in the town centres, including extensions, for example.

10.3.3 In the *Bishopbriggs, Kirkintilloch & Northern Villages catchment*, the forecast spare capacity to 2029 under the high estimate is quite substantial relative to the existing town centre floorspace. Taking account of market conditions, where small towns are struggling to retain shops, it suggests that the low estimate may be more realistic in terms of support for minor amounts of additional floorspace in the town centres over the next ten years.

10.3.4 However, the high estimate indicates support for some additional new comparison floorspace at Strathkelvin Retail Park, for example.

10.3.5 In the event of no significant comparison retail development taking place in East Dunbartonshire over the next few years, the outflow to Glasgow City Centre and other major shopping centres would probably increase.

| Table 10.1 Bearsden & Milngavie catchment: forecast spare comparison expenditure capacity (in 2018 prices) | | | |
|--|---------------------|---------------------|---------------------|
| | 2019-24 £million | 2024-29 £million | 2019-29 £million |
| High estimate | | | |
| (a) Growth in retained expenditure (turnover)- Table 9.4 | 5.0 | 8.8 | 13.8 |
| (b) Less planning consents - none | | | |
| High estimate (a-b) | 5.0 | 8.8 | 13.8 |
| Low estimate | | | |
| (a) Growth in retained expenditure (turnover)- Appendix 10 | 1.9 | 6.8 | 8.8 |
| (b) Less planning consents - none | | | |
| Low estimate (a-b) | 1.9 | 6.8 | 8.8 |
| Equivalent comparison floorspace | £ per sq m | £ per sq m | |
| Turnover/ floorspace ratio- high | 5,248 | 6,147 | |
| Turnover/ floorspace ratio- low | 4,931 | 5,632 | |
| | sq m net | sq m net | sq m net |
| High | 1,000 | 1,400 | 2,400 |
| Low | 400 | 1,200 | 1,600 |
| Note Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i> * The turnover ratio derives from the current turnover ratio in Milngavie TC £ 4,734 The ratio is increased to relate to 2024 and 2029, based on % turnover growth in E Dunbartonshire -Table 9.6 (high) and Appendix 10 (low) | | | |

| Table 10.2 Bishopbriggs, Kirkintilloch & Northern Villages catchment: forecast spare comparison expenditure capacity (in 2018 prices) | | | |
|--|---------------------|---------------------|---------------------|
| | 2019-24 £million | 2024-29 £million | 2019-29 £million |
| High estimate | | | |
| (a) Growth in retained expenditure (turnover)- Table 9.5 | 14.0 | 24.4 | 38.4 |
| (b) Less planning consents (B&Q mezzanine): - Table 9.7 | -5.3 | | -5.3 |
| High estimate (a-b) | 8.7 | 24.4 | 33.1 |
| Low estimate | | | |
| (a) Growth in retained expenditure (turnover)- Appendix 10 | 5.4 | 19.1 | 24.4 |
| (b) Less planning consents: - Table 9.7 | -5.3 | | -5.3 |
| Low estimate (a-b) | 0.1 | 19.1 | 19.2 |
| Equivalent comparison floorspace | £ per sq m | £ per sq m | |
| Turnover/ floorspace ratio- high | 4,642 | 5,437 | |
| Turnover/ floorspace ratio- low | 4,362 | 4,981 | |
| | sq m net | sq m net | sq m net |
| High | 1,900 | 4,500 | 6,400 |
| Low | 0 | 3,800 | 3,800 |
| Note Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i> * The turnover ratio derives from the current turnover ratio in Kirkintilloch TC £ 4,187 The ratio is increased to relate to 2024 and 2029, based on % turnover growth in E Dunbartonshire -Table 9.6 (high) and Appendix 10 (low) | | | |

| Table 10.3 East Dunbartonshire: forecast spare comparison expenditure capacity (in 2018 prices) | | | |
|--|---------------------|---------------------|---------------------|
| | 2019-24 £million | 2024-29 £million | 2019-29 £million |
| High estimate | | | |
| (a) Growth in retained expenditure (turnover)- Table 9.6 | 19.0 | 33.2 | 52.2 |
| (b) Less planning consents (B&Q mezzanine): - Table 9.7 | -5.3 | | -5.3 |
| High estimate (a-b) | 13.7 | 33.2 | 46.9 |
| Low estimate | | | |
| (a) Growth in retained expenditure (turnover)- Appendix 10 | 7.3 | 25.9 | 33.2 |
| (b) Less planning consents: - Table 9.7 | -5.3 | | -5.3 |
| Low estimate (a-b) | 2.0 | 25.9 | 27.9 |
| Equivalent comparison floorspace | | | |
| | sq m net | sq m net | sq m net |
| High | 2,900 | 5,900 | 8,800 |
| Low | 400 | 5,000 | 5,400 |
| Note Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i> Equivalent net floorspace based on sum of figures in Tables 10.1 and 10.2 | | | |

11 Conclusions and recommendations

11.1 Introduction

11.1.1 This final section summarises the outcomes of the forecasts of spare retail capacity and findings of the health checks on the town centres in East Dunbartonshire, to show the implications for shaping planning policies in the next LDP.

11.2 Convenience expenditure trends- implications for LDP2

11.2.1 Overall, the Council area is well-endowed with convenience shop floorspace, with some under-trading below average company turnover levels overall (-10%) for the Council area in Table 7.11. It represents a current shortfall of expenditure.

11.2.2 Forecast convenience expenditure growth rates are very low. There is no forecast spare convenience capacity in the Council area in total to 2029. It does not mean no new convenience store development, just not very much. New floorspace in the future will be mainly serviced by trade diversion from existing stores in the Council area. Competition is likely to focus on improvements to the range, quality and pricing, rather than significant additions to the floorspace.

11.2.3 **Policy implication-** no real changes needed, other than to perhaps add text that the town centres will be more exposed to further out of centre convenience store development proposals compared to the past based on the current capacity assessment. Also, emphasis should be given for supporting new convenience retail proposals which offer improvements to the *range, quality and pricing* within the town centres as the priority.

11.3 Comparison expenditure trends- implications for LDP2

11.3.1 Forecast growth rates of comparison retail expenditure are much higher than those for convenience expenditure. However, the proportion of internet retail spending is now very substantial and forecast to

increase, which reduces the associated requirement for new floorspace compared to the past. At the same time, the market trends described in sections 4 and 5 are having a huge influence on where most comparison expenditure will be going in the future, with increasing concentration in the major centres. For East Dunbartonshire, this means Glasgow City Centre and the major shopping centres in and around Glasgow.

11.3.2 Under these circumstances the range of forecast spare comparison expenditure capacity is very modest in the Bearsden & Milngavie comparison catchment area (Table 10.1). Although there is more forecast capacity in the Bishopbriggs, Kirkintilloch & Northern Village catchment, our view is that it is more likely to be at the low end of the range shown in Table 10.2, which is indeed low.

11.3.3 **Policy implication-** initially like that for convenience retailing about the primacy of town centres under the sequential test and support for encouraging improved *range, quality and pricing* within the town centres as the priority.

11.3.4 However, the position is more complex for comparison retailing. To retain and improve the comparison retail offer, it is fundamental that the town centres are enhanced and promoted as attractive destinations. It includes consideration of an appropriate mix of retail and non-retail services within an attractive town centre environment under the town centre strategies. Some new policy text may be required, together with new development plan proposals to enhance the four town centres.

11.3.5 Focus is given to our recommendations for each of the four town centres in the following paragraphs based on the health check analysis and SWOT summaries in section 6.

11.4 Bearsden town centre

11.4.1 No major changes or actions needed by the Council. Some address of the weaknesses in the SWAT summary in section 6 would benefit the town centre, notably continue

to improve the environment, especially for pedestrians, plus more signage for visitors for example. Negative spare convenience capacity in the Bearsden catchment (Table 8.1) heightens the risk from any future out of centre store proposals

11.5 Milngavie town centre

11.5.1 Like Bearsden, no major changes or actions needed by the Council. Some address of the weaknesses and opportunities in the SWAT summary in section 6 would support the town centre, including more signage for visitors. There is a low level of spare convenience expenditure (Table 8.2) which should be focussed on opportunities in the town centre, i.e. a very strong presumption against out of further centre store proposals, given the presence of Waitrose, Aldi and Home Bargains.

11.6 Bishopbriggs town centre

11.6.1 Address the weaknesses and opportunities in the SWAT summary in section 6, on matters where the Council has an influence, to assist the town centre.

11.6.2 The main opportunity is exploring and securing the best mix of uses on the land in Morrison's ownership, including the proposed new store and opportunities for civic space and residential development. There is some spare convenience expenditure (Table 8.3), but not a lot.

11.6.3 Other key matters where the Council could promote the town centre include improved parking/stopping places and making the environment more pleasant for pedestrians, given the heavy through-traffic.

11.7 Kirkintilloch town centre

11.7.1 The SWOT summary in section 6 indicates that Kirkintilloch town centre has several weaknesses. Some of these may become long term threats if no action is taken. A review of the extent of the existing town centre boundary is needed, with a view to achieving a more compact and better functioning town centre. Our study includes suggestions.

11.7.2 In our opinion, a more compact town centre would strengthen the focus on retailing and non-retail services, hopefully encouraging more investment and lessen the

risk of more vacant units (in a reduced town centre). The level of comparison retail floorspace is important in Kirkintilloch, but it will remain exposed to the retail market trends towards increasing multiple retailer concentration in the largest centres (Glasgow). Some contraction of the town centre boundary would be compatible with this trend.

11.7.3 There is negative forecast spare convenience expenditure in the Kirkintilloch catchment (Table 8.4), which heightens the risk from any future out of centre store proposals

11.7.4 Other important areas for action include promotion of significantly more public realm works to improve the attraction to the centre, plus encouragement of more restaurants/cafes and bars to develop the evening economy.

11.8 Village and Local centres

11.8.1 Mostly, these small-scale centres have proved self-regulating, as there is little evidence of high vacancy rates and most offer a range of retailing and services. Their function in the network of centres has preserved their offer to date. Looking to the future, it is possible that they may shrink, with more vacant units appearing. Also, operator representation is likely to change, with proportionally more services and less comparison shops.

11.8.2 There is no need to change the existing planning policies in relation to the village and local centres in context of the sequential test, but additional text supporting a flexible application of Use Classes may be beneficial, where appropriate.

11.9 Strathkelvin Retail Park

11.9.1 No policy change required, as the Park appears to thrive. An opportunity to explore the introduction of more leisure-related development in/by the Park, such as a cinema.

Appendix 1

East Dunbartonshire catchment areas: postcode sectors

| East Dunbartonshire catchment areas: postcode sectors - NRS 2016 based population projections | | | | |
|--|----------------|----------------|----------------|----------------|
| | 2011 Census | 2019 | 2024 | 2029 |
| Zone 1 Bearsden | | | | |
| G61 1 | 6,640 | | | |
| G61 2 | 6,230 | | | |
| G61 3 | 6,149 | | | |
| G61 4 | 8,218 | | | |
| Total | 27,237 | 28,275 | 28,938 | 29,598 |
| Zone 2 Milngavie | | | | |
| G62 6 (part) East Dunbartonshire | 3,764 | | | |
| G62 7 | 7,313 | | | |
| G62 8 (part) East Dunbartonshire | 2,488 | | | |
| Total | 13,565 | 14,082 | 14,412 | 14,741 |
| Zone 3 Bishopriggs | | | | |
| G64 1 (part) East Dunbartonshire | 11,711 | | | |
| G64 2 (part) East Dunbartonshire | 5,663 | | | |
| G64 3 | 5,579 | | | |
| Total | 22,953 | 23,828 | 24,387 | 24,943 |
| Zone 4 Kirkintilloch | | | | |
| G65 9 (part) East Dunbartonshire | 1,233 | | | |
| G66 1 | 3,825 | | | |
| G66 2 | 7,814 | | | |
| G66 3 | 7,236 | | | |
| G66 4 | 5,878 | | | |
| G66 5 (part) East Dunbartonshire | 3,583 | | | |
| Total | 29,569 | 30,696 | 31,416 | 32,132 |
| Zone 5 Northern Villages | | | | |
| G64 4 | 2,917 | | | |
| G66 7 | 4,730 | | | |
| G66 8 (part) East Dunbartonshire | 4,055 | | | |
| Total | 11,702 | 12,148 | 12,433 | 12,716 |
| East Dunbartonshire Council Area | 105,026 | 109,028 | 111,586 | 114,131 |
| Note: The catchment area (zones) populations are apportionments of the projected Council area total population | | | | |

Appendix 2

Household survey 2014- list of questions

- Q1a. Where do you normally go to do most of your family's main food shopping?
- Q1b. Which other centre or store do you visit for main food shopping, but much less often?
- Q1c. Where do you normally do your small, day-to-day top-up food shopping?
- Q2a. On average, how often do you do your main food shopping at Q1a?
- Q2b. On average, how often do you do your main food shopping at your second most visited store or centre - Q1b?
- Q2c. On average, how often do you do your top-up food shopping?
- Q3. How do you normally travel to Q1a for main food shopping?
- Q4. Could you tell me what other things you usually combine with doing your main food shopping?
- Q5a. Where do you visit most often to buy clothes, shoes and other fashion items?
- Q5b. Where do you visit most often to buy furniture, floor coverings and soft furnishings?
- Q5c. Where do you visit most often to buy large domestic electrical appliances such as fridges, washing machines, vacuum cleaners etc?
- Q5d. Where do you visit most often to buy DIY and hardware?
- Q5e. Where do you visit most often to buy other items of a mainly personal nature, such as sports goods, jewellery, books, toys, CDs, computers, mobiles, cameras, electronic games etc?
- Q6. Which of the following town centres do you visit most often?
- Q7. On average, how often do you visit Q6 town centre?
- Q8. What do you like most about Q6 town centre for shopping and as a place to visit generally?
- Q9. What do you dislike most about Q6 town centre for shopping and as a place to visit generally?
- Q10. How do you compare the general street environment of Q6 town centre with other town centres that you know?
- Q11. What improvements to Q6 town centre would make you visit there more often?
- Q13. What would make you visit Q6 town centre more often in the evenings?
- Q14. SEG of chief wage earner
- Q15. Age group of respondent
- Q16. Gender of respondent
- Q17. Would you be willing to be re-contacted for future quality control purposes?

Appendix 3

Convenience expenditure inflows and outflows from the 2014 household survey

These tables derive from Table 7.3

| Convenience expenditure inflows 2019- based on the household survey in the 2014 Retail Capacity Study (in 2018 prices) | | | | | | |
|--|------------------------------|---------------|---------------|---------------|---------------|----------------------------------|
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | |
| Residents' expenditure potential by zone 2019 | £ million | £ million | £ million | £ million | £ million | |
| | 60.9 | 30.3 | 51.3 | 66.1 | 26.2 | |
| Destination | Origin- inflows from: | | | | | Inflow |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | From rest of E Dunb £ million |
| Zone 1 | | 18% | 0% | 1% | 3% | 6.9 |
| Zone 2 | 25% | | 0% | 1% | 5% | 17.2 |
| Zone 3 | 0% | 0% | | 24% | 42% | 26.7 |
| Zone 4 | 0% | 0% | 1% | | 29% | 7.9 |
| Zone 5 | 0% | 0% | 0% | 0% | | 0.1 |

| Convenience expenditure outflows 2019- based on the household survey in the 2014 Retail Capacity Study | | | | | | |
|---|---------------|--------|--------|--------|--------|---------------|
| | Origin | | | | | |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Total E Dunb. |
| Retained expenditure by zone | 55% | 76% | 83% | 56% | 9% | 84% |
| Total outflows by zone | 45% | 24% | 17% | 44% | 91% | |
| | 100% | 100% | 100% | 100% | 100% | 84% |
| To centres outside E Dunb | 20% | 6% | 15% | 18% | 12% | 16% |

Appendix 4

Convenience expenditure inflows to East Dunbartonshire from the 2012 NSLSP survey

| Convenience expenditure inflows to East Dunbartonshire by zone from NSLSP 2012 survey data | | | |
|--|--|-------------------------------|-----------------------|
| Zone | Inflows to: | Inflows as % of E Dunb. total | £ million (2012 data) |
| 1 | Asda/Lidl/ M&S Simply Food/ Farmfoods- Bearsden | 9.1% | 22.5 |
| 2 | Tesco/Co-op/M&S Simply Food- Milngavie | 8.3% | 20.5 |
| 3 | Tesco/ASDA/Morrisons/M&S- Bishopbriggs + M&S Strathk RP | 5.6% | 13.9 |
| 4 | Lidl- Kilsyth and Tesco/Farmfoods/Sainsbury's- Kirkintilloch | 1.5% | 3.7 |
| 5 | Northern Villages- nothing recorded | | 0 |
| | Total from outside East Dunbartonshire | 24.5% | 60.7 |
| | East Dunbartonshire residents' expenditure total | | 247.6 |
| Note The above figures are from the NSLSP 2012 survey data in 2012 prices In the current study, the percentages are applied to the updated expenditure figures for 2019, 2024 and 2029 to derive inflows by zone | | | |

| Convenience expenditure inflows to East Dunbartonshire by zone, 2019 (in 2018 prices) <i>based on the proportions from the NSLSP survey data</i> | | | |
|--|--|-------------------------------|---------------|
| Zone | Inflows to: | Inflows as % of E Dunb. total | 2019 £million |
| 1 | Asda/Lidl/ M&S Simply Food/ Farmfoods- Bearsden | 9.1% | 21.4 |
| 2 | Tesco/Co-op/M&S Simply Food- Milngavie | 8.3% | 19.5 |
| 3 | Tesco/ASDA/Morrisons/M&S- Bishopbriggs + M&S Strathk RP | 5.6% | 13.2 |
| 4 | Lidl- Kilsyth and Tesco/Farmfoods/Sainsbury's- Kirkintilloch | 1.5% | 3.5 |
| 5 | Northern Villages- nothing recorded | | |
| | Total from outside East Dunbartonshire | 24.5% | 57.5 |
| | East Dunbartonshire residents' expenditure total 2019 | | 234.8 |
| Note The above figures are from the NSLSP 2012 survey data in 2018 prices In the current study, the percentages are applied to the updated expenditure figures for 2019, 2024 and 2029 to derive inflows by zone | | | |

The 2014 East Dunbartonshire Retail Capacity Assessment drew on the 2008 NSLSP data, as the 2012 survey was not available from the Clydeplan Authority at that time.

NSLSP stands for *National Survey of Local Shopping Patterns*. It was a commercially available, off-the shelf' product, formerly from CBRE. The Clydeplan Authority purchased the data for their area.

Appendix 5

Convenience trade diversion to new stores in Milngavie and Kirkintilloch since 2014- effect on shopping patterns

Table A (7.10- repeat)
East Dunbartonshire convenience retail developments since 2014 and consents (in 2018 prices)

| | Floorspace sq m | | Av. turnover ratio £/sq m | Turnover £million |
|---|-----------------|-------|---------------------------|-------------------|
| | gross | net | | |
| Stores developed and operational after 2014 Study | | | | |
| Lidl, Kirkintilloch (total 1,644 sq m gross, 1,286 net- 85% conv) | 1,397 | 1,093 | 9,734 | 10.6 |
| Waitrose, Milngavie (total 3,375 sq m gross-85% conv) | 2,869 | 1,975 | 11,432 | 22.6 |
| Current planning consents- development near completion- January 2019 | | | | |
| Main St, Milngavie (West Retail Park) TP/ED/18/0268 Aldi (Unit 1) Total 1,751 sq m gross, 1,227 sq m net -80% conv | | 982 | 12,333 | 12.1 |
| Home Bargains (Unit 2) Total 1,702 sq m gross, 1,228 sq m net -60% conv | | 737 | 8,673 | 6.4 |
| Total | | | | 51.7 |

Note:

Source of gross floorspace totals- Council. Lidl opened in late Nov 2013. Waitrose opened in June 2015

Turnover ratios derive from the Retail Rankings 2018

Consent was granted to extend the Morrisons store in Bishopbriggs, as recorded in Retail Capacity Study 2014. It has not been implemented so it has not been included in this table as the passage of time suggests the situation probably will not change. The company has an interest in an alternative site - Proposal of Application TP/ED/18/0406

| |
|---|
| <p>Table B</p> <p>Estimated pattern of convenience trade diversion to Waitrose, Lidl, Aldi and Home Bargains (in 2018 prices)</p> |
|---|

| | Waitrose Milngavie | | Lidl Kirkintilloch | | Aldi plus Home Bargains | |
|---------------------------------|-----------------------|-------------|-----------------------|-------------|----------------------------|-------------|
| | % | £million | % | £million | % | £million |
| Trade diversion from: | | | | | | |
| Zone1 Bearsden | 20% | 4.5 | 0% | | 15% | 2.8 |
| Zone 2 Milngavie | 35% | 7.9 | 0% | | 81% | 15.0 |
| Zone 3 Bishopbriggs | 12% | 2.7 | 20% | 2.1 | 0% | |
| Zone 4 Kirkintilloch | 3% | 0.7 | 80% | 8.5 | 0% | |
| Zone 5 Northern Villages | 0% | | 0% | | 0% | |
| Stores outside E Dunbartonshire | 30% | 6.8 | 0% | | 4% | 0.7 |
| Total Turnover | 100% | 22.6 | 100% | 10.6 | 100% | 18.5 |

Note

Total turnover from previous table. The patterns of trade diversion are broad brush estimates. Where 0% is shown, this means very small/ negligible rather than none at all.

Table C
Effect on convenience shopping patterns in 2019

| | Residents' expenditure potential 2019 £million | Inflows to new stores | | Outflows to new stores | |
|--|---|-----------------------|-------------------------|------------------------|-------------------------|
| | | £million | as % of res expenditure | £million | as % of res expenditure |
| Zone1 Bearsden- to Milngavie | 60.9 | | | -7.3 | -12% |
| Zone 2 Milngavie | 30.3 | | | | |
| from Bearsden | | 7.3 | 24% | | |
| from Bishopbriggs | | 2.7 | 9% | | |
| from Kirkintilloch | | 0.7 | 2% | | |
| from outside E Dunbartonshire | | 7.5 | 25% | | |
| Zone 3 Bishopbriggs | 51.3 | | | | |
| to Milngavie | | | | -2.7 | -5% |
| to Kirkintilloch Lidl | | | | -2.1 | -4% |
| Zone 4 Kirkintilloch | 66.1 | | | | |
| to Milngavie | | | | -0.7 | -1% |
| from Bishopbriggs | | 2.1 | 3% | | |
| Zone 5 Northern Villages | 26.2 | 0 | | 0 | |
| Stores outside E Dunbartonshire | | | | | |
| to Milngavie | | | | -7.5 | |
| Total | | 20.3 | | -20.3 | |

Appendix 6

Comparison expenditure inflows and outflows from the 2014 household survey

These tables derive from Table 9.3

| Comparison expenditure inflows 2019- based on the household survey in the 2014 Retail Capacity Study (in 2018 prices) | | | |
|---|--|--|--|
| Residents' expenditure potential by catchment 2019 | Bearsden & Milngavie £ million 120.9 | Bishopbriggs/Kirkintilloch N Villages £ million 190.3 | |
| | Origin- inflows from: | | Inflow |
| Destination Bearsden & Milngavie Bishopbriggs & Kirkintilloch | | 0% | From rest of E Dunb £ million 0 7.6 |
| | 4% | | |

| Comparison expenditure outflows 2019- based on the household survey in the 2014 Retail Capacity Study | | | |
|--|----------------------|--|------------------------------|
| | Bearsden & Milngavie | Bishopbriggs/Kirkintilloch N Villages | Total East Dunbartonshire |
| Retained expenditure by catchment | 31% | 64% | 47% |
| Total outflows by catchment | 69% | 36% | |
| | 100% | 100% | |
| To centres outside E Dunb | 65% | 36% | 53% |
| Note The retained expenditure in Bishopbriggs/ Kirkintilloch & N Villages was 55% in the original 2014 survey. This has been updated in this table for 2019 | | | |

Appendix 7

Comparison expenditure inflows to East Dunbartonshire from the 2012 NSLSP survey

| Comparison expenditure inflows to East Dunbartonshire by catchment from NSLSP 2012 survey data | | | |
|--|---|----------------------------------|--------------------------|
| | Inflows to: | Inflows as % of E Dunb. total | £ million (2012 data) |
| | Bearsden & Milngavie comparison catchment (Zones 1 & 2) | 1.3% | 4.3 |
| | Bishopbriggs/ Kirkintilloch/ N Villages comparison catchment (Zones 3, 4 & 5) | 1.0% | 3.3 |
| | Total from outside East Dunbartonshire | 2.3% | 7.7 |
| | East Dunbartonshire residents' expenditure total | | 337.3 |
| <p>Note</p> <p>The above figures are from the NSLSP 2012 survey data in 2012 prices</p> <p>In the current study, the percentages are applied to the updated expenditure figures for 2019, 2024 and 2029 to derive inflows by catchment</p> | | | |

| Comparison expenditure inflows to East Dunbartonshire by catchment, 2019 (in 2018 prices) <i>based on the proportions from the NSLSP survey data</i> | | | |
|--|---|----------------------------------|------------------|
| | Inflows to: | Inflows as % of E Dunb. total | 2019 £million |
| | Bearsden & Milngavie comparison catchment (Zones 1 & 2) | 1.3% | 4.0 |
| | Bishopbriggs/ Kirkintilloch/ N Villages comparison catchment (Zones 3, 4 & 5) | 1.0% | 3.1 |
| | Total from outside East Dunbartonshire | 2.3% | 7.1 |
| | East Dunbartonshire residents' expenditure total 2019 | | 311.2 |
| <p>Note</p> <p>The above figures are from the NSLSP 2012 survey data in 2018 prices</p> <p>In the current study, the percentages are applied to the updated expenditure figures for 2019, 2024 and 2029 to derive inflows by catchment</p> | | | |

The 2014 East Dunbartonshire Retail Capacity Assessment drew on the 2008 NSLSP data, as the 2012 survey was not available from the Clydeplan Authority at that time.

NSLSP stands for *National Survey of Local Shopping Patterns*. It was a commercially available, off-the shelf' product, formerly from CBRE. The Clydeplan Authority purchased the data for their area.

Appendix 8

Comparison trade diversion to new stores in Milngavie and Kirkintilloch since 2014- effect on shopping patterns

Table A (repeat of Table 9.7)**East Dunbartonshire comparison retail developments since 2014 and consents (in 2018 prices)**

| | Floorspace sq m | | Av. turnover ratio £/sq m | Turnover £million |
|--|-----------------|-------|---------------------------|-------------------|
| | gross | net | | |
| Stores developed and operational after 2014 Study | | | | |
| Lidl, Kirkintilloch (total 1,644 sq m gross, 1,286 net- 85% conv) | 247 | 193 | 5,806 | 1.1 |
| Waitrose, Milngavie (total 3,375 sq m gross-15% comp) | 506 | 348 | 4,599 | 1.6 |
| Current planning consents- development near completion- February 2019 | | | | |
| Main St, Milngavie (West Retail Park) TP/ED/18/0268 | | | | |
| Aldi (Unit 1) | | | | |
| Total 1,751 sq m gross, 1,227 sq m net -20% comp | | 245 | 6,634 | 1.6 |
| Home Bargains (Unit 2) | | | | |
| Total 1,702 sq m gross, 1,228 sq m net -40% comp | | 491 | 8,673 | 4.3 |
| Sub total | | | | 8.6 |
| Current planning consents- no development yet February 2019 | | | | |
| B&Q Strathkelvin Retail Park TP/ED/15/0310- mezzanine | 2,787 | 2,230 | 2,362 | 5.3 |
| Grand Total | | | | 13.9 |

Note:

Source of gross floorspace totals- Council. Lidl opened in late Nov 2013. Waitrose opened in June 2015

Turnover ratios derive from the Retail Rankings 2018

Table B**Estimated pattern of comparison trade diversion to Waitrose, Lidl, Aldi and Home Bargains (in 2018 prices)**

| | Waitrose Milngavie | | Lidl Kirkintilloch | | Aldi plus Home Bargains | |
|---|-----------------------|------------|-----------------------|------------|----------------------------|------------|
| | % | £million | % | £million | % | £million |
| Trade diversion from: | | | | | | |
| Bearsden & Milnatie catchment | 40% | 0.6 | 0% | | 37% | 2.2 |
| Bishopbriggs/ Kirkintilloch/ N Villages catchment | 5% | 0.1 | 55% | 0.6 | 5% | 0.3 |
| Stores outside E Dunbartonshire | 55% | 0.9 | 45% | 0.5 | 58% | 3.4 |
| Total Turnover | 100% | 1.6 | 100% | 1.1 | 100% | 5.9 |

Note

Total turnover from previous table. The patterns of trade diversion are broad brush estimates. Where 0% is shown, this means very small/ negligible rather than none at all.

Appendix 9

Strathkelvin Retail Park- list of retailers

Strathkelvin Retail Park: comparison floorspace and turnover, 2019 (in 2018 prices)

| | Floorspace sq m | | Turnover ratio £/sq m | Turnover £million |
|------------------------|-----------------|---------------|--------------------------|----------------------|
| | gross | net | | |
| *B & Q Warehouse | 9,290 | 7,432 | 2,632 | 19.6 |
| Matalan | 3,667 | 2,934 | 2,114 | 6.2 |
| Currys/PC World | 1,846 | 1,477 | 12,252 | 18.1 |
| Argos | 1,529 | 382 | 20,878 | 8.0 |
| Nike | 942 | 754 | 5,685 | 4.3 |
| Poundland | 932 | 746 | 3,747 | 2.8 |
| Pets at Home | 933 | 746 | 2,852 | 2.1 |
| Sports Direct | 933 | 746 | 5,685 | 4.2 |
| Carpetright | 932 | 746 | 1,365 | 1.0 |
| Boots | 910 | 728 | 4,272 | 3.1 |
| Bensons | 699 | 559 | 2,312 | 1.3 |
| Next | 1,570 | 1,256 | 4,220 | 5.3 |
| Home Bargains | 894 | 715 | 8,673 | 6.2 |
| ***Halfords (926 sq m) | | | | |
| Total | 25,077 | 19,221 | | 82.2 |

Note

Gross floorspace from the Council/ Assessor's records, with average company turnover ratios based on the Retail Rankings 2018

* B&Q has a total area of 10,046 sq m gross, which includes the garden centre (not included above)

*** Halfords not included because it is mainly associated with car accessories- (non- retailing under the Govt. classification)

Appendix 10

Comparison capacity forecasts- low estimate

| Table A | |
|--|--------|
| East Dunbartonshire comparison expenditure per capita (in 2018 prices)- low estimate | |
| 2017/18 | £1,000 |
| 2018/19 | £1,000 |
| 2019/20 | £1,000 |
| 2020/21 | £1,000 |
| 2021/22 | £1,000 |
| 2022/23 | £1,000 |
| 2023/24 | £1,000 |
| 2024/25 | £1,000 |
| 2025/26 | £1,000 |
| 2026/27 | £1,000 |
| 2027/28 | £1,000 |
| 2028/29 | £1,000 |
| 2029/30 | £1,000 |
| 2030/31 | £1,000 |
| 2031/32 | £1,000 |
| 2032/33 | £1,000 |
| 2033/34 | £1,000 |
| 2034/35 | £1,000 |
| 2035/36 | £1,000 |
| 2036/37 | £1,000 |
| 2037/38 | £1,000 |
| 2038/39 | £1,000 |
| 2039/40 | £1,000 |
| 2040/41 | £1,000 |
| 2041/42 | £1,000 |
| 2042/43 | £1,000 |
| 2043/44 | £1,000 |
| 2044/45 | £1,000 |
| 2045/46 | £1,000 |
| 2046/47 | £1,000 |
| 2047/48 | £1,000 |
| 2048/49 | £1,000 |
| 2049/50 | £1,000 |
| 2050/51 | £1,000 |
| 2051/52 | £1,000 |
| 2052/53 | £1,000 |
| 2053/54 | £1,000 |
| 2054/55 | £1,000 |
| 2055/56 | £1,000 |
| 2056/57 | £1,000 |
| 2057/58 | £1,000 |
| 2058/59 | £1,000 |
| 2059/60 | £1,000 |
| 2060/61 | £1,000 |
| 2061/62 | £1,000 |
| 2062/63 | £1,000 |
| 2063/64 | £1,000 |
| 2064/65 | £1,000 |
| 2065/66 | £1,000 |
| 2066/67 | £1,000 |
| 2067/68 | £1,000 |
| 2068/69 | £1,000 |
| 2069/70 | £1,000 |
| 2070/71 | £1,000 |
| 2071/72 | £1,000 |
| 2072/73 | £1,000 |
| 2073/74 | £1,000 |
| 2074/75 | £1,000 |
| 2075/76 | £1,000 |
| 2076/77 | £1,000 |
| 2077/78 | £1,000 |
| 2078/79 | £1,000 |
| 2079/80 | £1,000 |
| 2080/81 | £1,000 |
| 2081/82 | £1,000 |
| 2082/83 | £1,000 |
| 2083/84 | £1,000 |
| 2084/85 | £1,000 |
| 2085/86 | £1,000 |
| 2086/87 | £1,000 |
| 2087/88 | £1,000 |
| 2088/89 | £1,000 |
| 2089/90 | £1,000 |
| 2090/91 | £1,000 |
| 2091/92 | £1,000 |
| 2092/93 | £1,000 |
| 2093/94 | £1,000 |
| 2094/95 | £1,000 |
| 2095/96 | £1,000 |
| 2096/97 | £1,000 |
| 2097/98 | £1,000 |
| 2098/99 | £1,000 |
| 2099/00 | £1,000 |
| 2100/01 | £1,000 |
| 2101/02 | £1,000 |
| 2102/03 | £1,000 |
| 2103/04 | £1,000 |
| 2104/05 | £1,000 |
| 2105/06 | £1,000 |
| 2106/07 | £1,000 |
| 2107/08 | £1,000 |
| 2108/09 | £1,000 |
| 2109/10 | £1,000 |
| 2110/11 | £1,000 |
| 2111/12 | £1,000 |
| 2112/13 | £1,000 |
| 2113/14 | £1,000 |
| 2114/15 | £1,000 |
| 2115/16 | £1,000 |
| 2116/17 | £1,000 |
| 2117/18 | £1,000 |
| 2118/19 | £1,000 |
| 2119/20 | £1,000 |
| 2120/21 | £1,000 |
| 2121/22 | £1,000 |
| 2122/23 | £1,000 |
| 2123/24 | £1,000 |
| 2124/25 | £1,000 |
| 2125/26 | £1,000 |
| 2126/27 | £1,000 |
| 2127/28 | £1,000 |
| 2128/29 | £1,000 |
| 2129/30 | £1,000 |
| 2130/31 | £1,000 |
| 2131/32 | £1,000 |
| 2132/33 | £1,000 |
| 2133/34 | £1,000 |
| 2134/35 | £1,000 |
| 2135/36 | £1,000 |
| 2136/37 | £1,000 |
| 2137/38 | £1,000 |
| 2138/39 | £1,000 |
| 2139/40 | £1,000 |
| 2140/41 | £1,000 |
| 2141/42 | £1,000 |
| 2142/43 | £1,000 |

| | | |
|--|-----------|-----------|
| 2019 £ | 2024 £ | 2029 £ |
| 3,731 | 4,272 | 5,069 |
| <i>*excluding special forms of trading</i> | | |
| 2,854 | 2,905 | 3,244 |
| Note | | |
| Original comparison expenditure per capita data provided by Pitney Bowes in their Geolnsight report 2019 for this study was in 2017 prices, including the projections, as shown below. | | |
| £3,666 | £4,198 | £4,981 |
| These have been converted to 2018 prices from Pitney Bowes Retail Expenditure Guide 2018/19, Table 3.1- factor of 1.0176 | | |
| Comparison expenditure per capita growth rates <i>per annum</i> for East Dunbartonshire are: | | |
| | 2019-2024 | 2024-2029 |
| | 2.7% | 3.5% |
| *The proportion of spending relating to Special Forms of Trading (SFT) requires to be deducted from data, so that it relates to retail floorspace. Most SFT comprises internet spending. Pitney Bowes publishes estimates of the proportions of SFT for the UK. | | |
| Proportions in Pitney Bowes Retail Expenditure Guide 2018/19, Table 3.4: | | |
| -26.1% | -30.7% | -33.5% |
| Pitney Bowes also advise that not all the forecast allowance for SFT should be deducted from expenditure, as there is some overlap between non-store based sales and store-related internet sales. They say that the extent of the overlap is unknown. For this study, we estimate a 10% reduction in the Pitney Bowes to acknowledge the issue. | | |
| Proportions applied in this study (10% less than the above figures) | | |
| -23.5% | -32.0% | -36.0% |

| |
|--|
| Table B |
| East Dunbartonshire residents' comparison expenditure potential (in 2018 prices)- low estimate |

| Excluding SFT (special forms of trading) | 2019 £ million | <i>growth 2019-24 £ million</i> | 2024 £ million | <i>growth 2024-29 £ million</i> | 2029 £ million |
|--|-------------------|---|-------------------|---|-------------------|
| Comparison catchment areas | | | | | |
| Bearsden & Milngavie (Zones 1 & 2) | 120.9 | 5.0 | 125.9 | 17.9 | 143.8 |
| Bishopbriggs/ Kirkintilloch/ N Villages (Zones 3,4 & 5) | 190.3 | 7.9 | 198.2 | 28.2 | 226.4 |
| East Dunbartonshire -total | 311.2 | 13.0 | 324.2 | 46.1 | 370.2 |
| <p>Note</p> <p>From Tables 2.2 and 9.1. Figures are rounded.</p> | | | | | |

| |
|--|
| <p>Table C1</p> <p>Bearsden & Milngavie catchment area- comparison expenditure and turnover (in 2018 prices)- low estimate</p> |
|--|

| | % | 2019 £million | 2024 £million | 2029 £million |
|--|------|------------------|------------------|------------------|
| Residents' expenditure potential | | 120.9 | 125.9 | 143.8 |
| Add: inflows from rest of E Dunbartonshire (% in 2014) | 0% | | | |
| inflows to Waitrose/ Aldi/ H Bargains from rest of E Dunb. | 0.3% | 0.4 | 0.4 | 0.4 |
| inflows from outside E Dunbartonshire | 3% | 4.0 | 4.1 | 4.7 |
| inflows to Waitrose/ Aldi/ H Bargains from outside E Dunb. | 4% | 4.3 | 4.5 | 5.1 |
| Less: outflows from Bearsden & Milngavie (% in 2014) | -69% | -83.4 | -86.9 | -99.2 |
| Retained expenditure (turnover) | | 46.1 | 48.0 | 54.9 |
| Note | | | | |
| Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb. plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices | | | | |

| Table C2 Bishopbriggs, Kirkintilloch & Northern Villages catchment area- comparison expenditure and turnover (in 2018 prices)-low estimate | | | | |
|--|------|------------------|------------------|------------------|
| | % | 2019 £million | 2024 £million | 2029 £million |
| Residents' expenditure potential | | 190.3 | 198.2 | 226.4 |
| Add: inflows from rest of E Dunbartonshire % in 2014) | 4% | 7.6 | 7.9 | 9.1 |
| inflows to Lidl from rest of E Dunbartonshire | 0% | | | |
| inflows from outside E Dunbartonshire | 2% | 3.1 | 3.2 | 3.7 |
| inflows to Lidl from outside E Dunbartonshire | 0.3% | 0.5 | 0.5 | 0.6 |
| *Less: outflows from Bishopbriggs, Kirkintilloch & Northern Villages (% adjusted since 2014) | -36% | -68.5 | -71.4 | -81.5 |
| outflows to Milngavie Waitrose/Aldi/ Home Bargains | -2% | -4.3 | -4.5 | -5.1 |
| Retained expenditure (turnover) | | 128.7 | 134.1 | 153.1 |
| Note Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices * Estimated outflows reduced for 2019, compared to the 2014 Retail Capacity Assessment | | | | |

| Table C3 East Dunbartonshire- comparison expenditure and turnover (in 2018 prices)- low estimate | | | | |
|--|------|------------------|------------------|------------------|
| | % | 2019 £million | 2024 £million | 2029 £million |
| Residents' expenditure potential | | 311.2 | 324.2 | 370.2 |
| inflows from outside E Dunbartonshire | 2.3% | 7.1 | 7.4 | 8.4 |
| inflows from outside E Dunb to Waitrose/Aldi/ H Bargains and Lidl | 1.5% | 4.8 | 5.0 | 5.7 |
| Less: outflows from E Dunbartonshire (% in 2014) | -48% | -148.2 | -154.4 | -176.4 |
| Retained expenditure (turnover) | | 174.8 | 182.1 | 208.0 |
| Note Patterns from 2014 Retail Capacity Study with updated inflows to E Dunb, plus patterns relating to Waitrose, Aldi, Home Bargains, Lidl- see Appendices | | | | |