

East Dunbartonshire Council EAST DUNBARTONSHIRE RETAIL CAPACITY STUDY



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Final Report
December 2009

	2009	2015	2020
ED TOTAL	£4.69	£4.82	£2.12

- 7.16 The value of overtrading in Kirkintilloch; Milngavie and the Northern Villages can be converted into required floorspace estimates for supermarket and discount operators based on average sales density figures.
- 7.17 *At existing market shares* Kirkintilloch has capacity for between 334 sq.m (net) of supermarket convenience floorspace **or** 915 sq.m. (net) discounter convenience floorspace. Milngavie and the Northern Villages have slightly more limited convenience floorspace requirements.

Table 7.7 Future Convenience Floorspace Requirements (sq.m. net)³¹

	2009	2015	2020
KIRKINTILLOCH			
Supermarket Operator	334	330	289
Discount Operator	915	905	793
BISHOPBRIGGS			
Supermarket Operator	-181	-198	-269
Discount Operator	-495	-543	-736
MILNGAVIE			
Supermarket Operator	216	223	177
Discount Operator	591	610	486
BEARSDEN			
Supermarket Operator	-89	-65	-128
Discount Operator	-243	-179	-351
NORTHERN VILLAGES			
Supermarket Operator	101	102	102
Discount Operator	276	279	279

Comparison

- 7.18 For comparison goods, East Dunbartonshire faces significant competition from Glasgow. While this applies particularly to 'High Street' and fashion retailing, it also affects furniture and larger household items. The projected increase in spending on comparison goods is significant.

Current Requirement

- 7.19 The capacity assessment indicates a current shortfall in comparison goods floorspace across the East Dunbartonshire area (1,662 sq.m).

Future Requirement

- 7.20 Additional capacity released through increased comparison expenditure and increased market share is then assessed alongside turnover efficiency improvements and pipeline developments to identify future floorspace requirements.
- 7.21 The comparison goods scenarios modeled examine the implications of a continuation in existing market shares and an extension to market shares to 37.5% (an increase of 1.9%).
- 7.22 Table 7.8 identifies the quantity of future comparison floorspace that can be supported at existing market shares and improved market shares.

³¹ At existing market shares

Table 7.8: Comparison Floorspace Requirements (Sq. m. net)

	2009	2015	2020
ED Residual capacity	£5.93	£14.48	£27.08
Pipeline			
No comparison pipeline developments			
Expenditure Capacity			
Existing Market Share	£5.93	£14.48	£27.08
Additional Market Share			
uplift to 37.5%	£6.69	£7.50	£8.60
Capacity with Improved Market Share			
	£12.61	£21.98	£35.68
Floorspace Requirement (sq.m.net)			
Existing Market Share	1,662	3,825	6,713
Improved Market Share	3,537	5,807	8,844

8 CONCLUSIONS & RECOMMENDATIONS

Conclusions

Performance Analysis

- 8.1 East Dunbartonshire Council has implemented a number of initiatives and infrastructure improvement projects designed to increase East Dunbartonshire's vitality and viability and attract additional footfall and investment.
- 8.2 Bearsden and Milngavie offer a good quality shopping environment with mainly attractive shopfronts and building facades. The environmental quality and general shopping environment in Bishopbriggs and Kirkintilloch is more limited.
- 8.3 Although shopfronts in Bishopbriggs are generally well maintained, visibility (at the Morrisons side of the town centre) is restricted by the Council offices directly above. The overall streetscape is further impaired by the busy road junction and traffic congestion at Bishopbriggs Cross. Similarly Kirkintilloch's shopping amenity is limited by a busy road along the length of an elongated High Street with supermarket shopping facilities at either end.
- 8.4 Parking and pedestrian accessibility in each of the town centres is restricted and is a key factor limiting growth and consumer footfall. Each of the town centre's, with the exception of Kirkintilloch, has a noticeable lack of vacancies.

Quantitative Requirement

Convenience

- 8.5 The quantitative assessment found limited convenience capacity in East Dunbartonshire at existing market shares (please see Table 7.7).
- Kirkintilloch has capacity for 334 sq.m³² of supermarket convenience floorspace **or** 915 sq.m of discounter convenience floorspace;
 - Milngavie has a floorspace requirement of 216 sq.m of supermarket convenience floorspace **or** 591 sq.m of discounter convenience floorspace; and
 - The Northern Villages zone has a small requirement of 101 sq. m of supermarket convenience floorspace **or** 279 sq.m of discounter convenience floorspace.

Comparison

- 8.6 Comparison floorspace requirements have been identified across the East Dunbartonshire area at existing market shares (35.6%) and improved market shares (37.5%).

Table 8.1: East Dunbartonshire Comparison Floorspace Requirement (sq.m net)

	2009	2015	2020
Existing Market Share	1,662	3,825	6,713
Improved Market Share	3,537	5,807	8,844

Source: RTP

³² All floorspace requirement estimates are in net sq.m.

Recommendations

Policy Response

- 8.7 A policy response to improve the attractiveness of East Dunbartonshire's town centres as shopping destinations is vital to maintain and increase market share and retain town centre vitality and viability.
- 8.8 For bulky goods, measures to improve the range and quality of East Dunbartonshire's retail offer particularly at Strathkelvin Retail Park will allow East Dunbartonshire to compete more effectively with Glasgow North Retail Park in Robroyston and Glasgow generally.

Developing East Dunbartonshire's retail appeal

- 8.9 Measures to attract a broader variety of retail operators to East Dunbartonshire should be actively pursued by the Council.
- 8.10 The Retailers Requirements section (please see Table 5.6) identifies retailers that have expressed an interest in East Dunbartonshire town centres and provides an indication of demand by floorspace type and scale.
- 8.11 Bearsden and Milngavie have the socio-economic profile to support small niche retail outlets such as luxury comparison goods (i.e. gifts or home furnishings) or luxury convenience goods (i.e. specialty foods or handmade soaps).
- 8.12 Farmers markets (already established in Milngavie and Kirkintilloch) offer an appealing product that can help boost town centre footfall. The short term pedestrianisation of New Kirk Road in Bearsden could provide an attractive location for a monthly farmers market or visiting fair (food; craft; books; etc). Suitable venues are less accessible in Bishopbriggs however the disabled car park at Morrisons could provide an ideal central events space should this area be redeveloped in the future.

Location of New Floorspace

- 8.13 National planning guidelines advise planning authorities and developers to adopt a sequential approach to retail development where town centre sites are sequentially preferable to edge of centre sites; followed by commercial centre sites and then out of centre sites.

Convenience

- 8.14 The location of new convenience floorspace in East Dunbartonshire's town centres is a critical consideration. The allocation of additional floorspace and any associated parking facilities in Milngavie and Kirkintilloch town centres should be carefully considered by East Dunbartonshire Council to avoid further fragmentation.

Mainstream Comparison

- 8.15 The high levels of leakage in the area indicate considerable scope for additional provision assuming that the market shares of the respective town centres can be increased. However, demand for retail facilities is not wholly supply-led and a range of interventions will be required in order to attract shoppers from higher order centres and new developments outside the Council area. Should the Council wish to support new development, we recommend that that new proposals should :
- Be of a high design quality and incorporated in the existing town centre;
 - be of a 'high street' type format; and
 - be targeted at mid-range retailers (both multiples and independent operators).