Inverclyde council
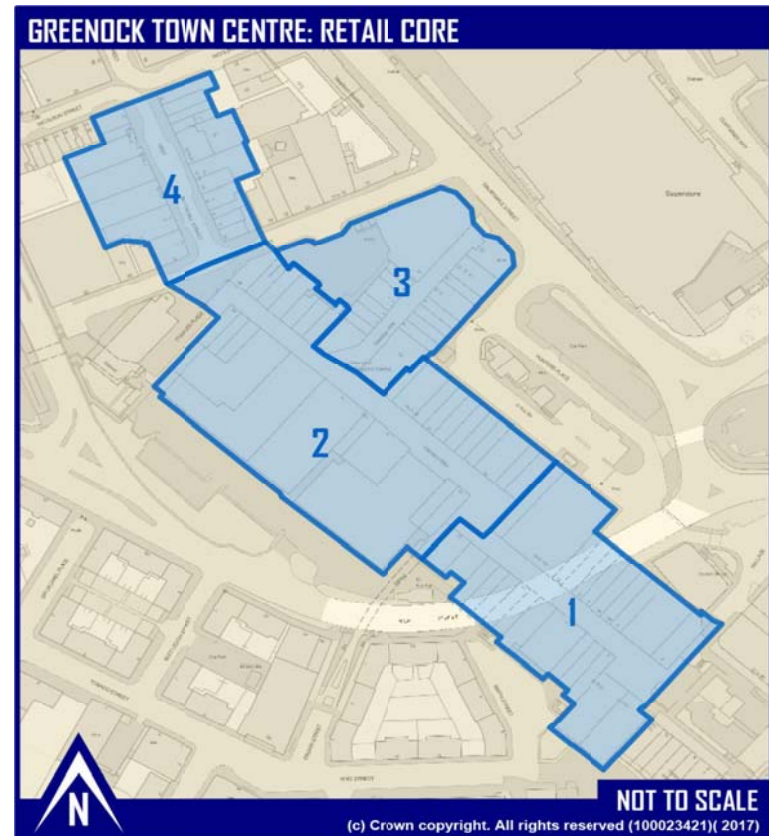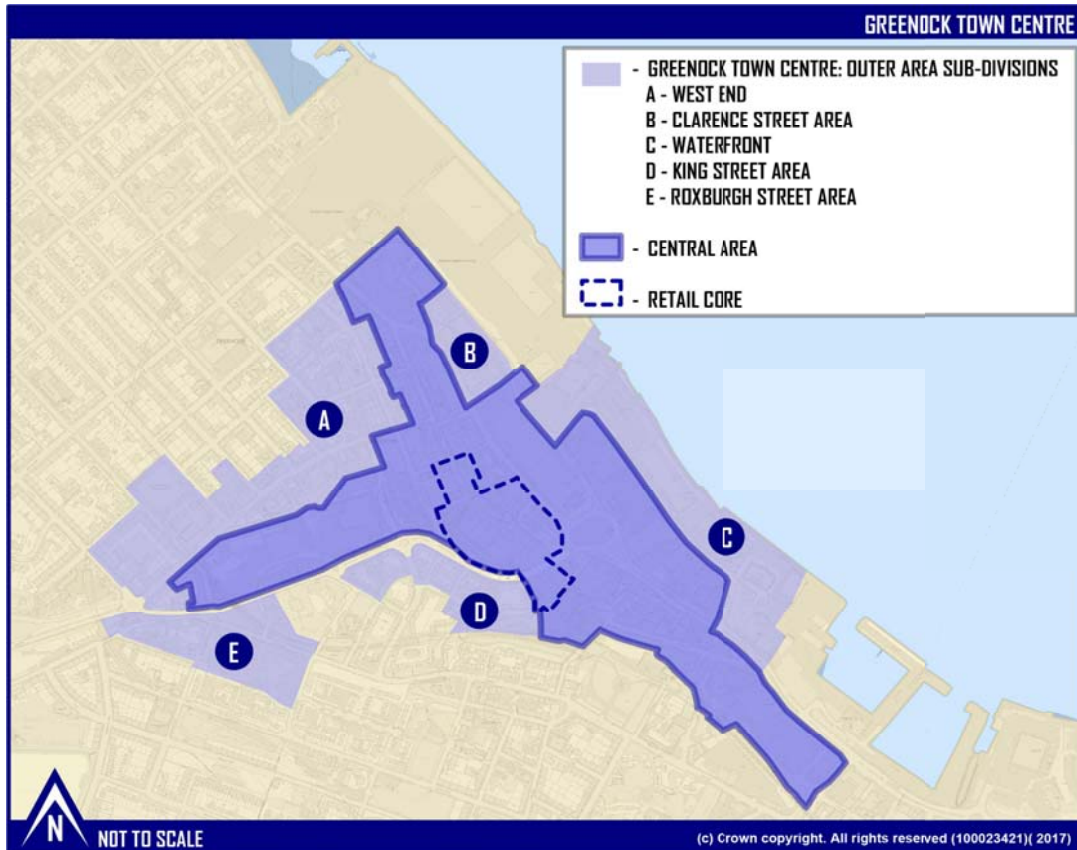# LOCAL DEVELOPMENT PLAN

MAIN ISSUES REPORT
MARCH 2017

GREENOCK TOWN CENTRE
BACKGROUND REPORT

Introduction

The purpose of this paper is to support the publication of the Inverclyde Local Development Plan Main Issues Report by providing background and an explanation of the options presented in Main Issue 5 in relation to the policy approach to the retail core and the outer area of Greenock Town Centre.

The owners of the Oak Mall submitted proposals through the call for sites to redevelop the Clyde Square end of the mall with more leisure oriented uses. This would require a change in the policy approach in this area, which currently requires at least 75% of the frontage to be Use Class 1 (shops). Issue 5 also considers changing the approach in the outer area of the town centre. Currently it is split into 5 divisions and different uses are directed to each based on their character and function. It is proposed to remove the divisions and allow all town centre uses to be developed across the area. The aim of these changes is to make it easier for different uses to locate in the town centre, increasing its attractiveness to businesses and shoppers.

GREENOCK TOWN CENTRE

- GREENOCK TOWN CENTRE: OUTER AREA SUB-DIVISIONS
  A - WEST END
  B - CLARENCE STREET AREA
  C - WATERFRONT
  D - KING STREET AREA
  E - ROXBURGH STREET AREA

- CENTRAL AREA

- RETAIL CORE

NOT TO SCALE

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GREENOCK TOWN CENTRE: RETAIL CORE

NOT TO SCALE

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Policy Context

The Glasgow and the Clyde Valley Strategic Development Plan (2012) identifies a network of Strategic Centres, which includes Greenock. The Plan identifies Greenock as having good accessibility, but with the need to address the effects of a declining population and the quality of the environment by improving the public realm and retail offer, including the complementary role of Port Glasgow.

The Proposed Clydeplan Strategic Development Plan (2016) continues to identify Greenock as a Strategic Centre with a role and function incorporating retail, civic, leisure, community, employment, business and residential uses. Challenges identified include the need to address the effects of a declining population and to continue to improve the quality of the environment as well as to strengthen the retail role and take account of changing shopper habits and patterns. Future actions for the centre are to continue to improve the public realm and retail offer, including the complementary role of Port Glasgow, and to investigate the actions needed to undertake a health check for the town centre.

The Inverclyde Local Development Plan (2014) places Greenock Town Centre at the top of the hierarchy of the network of centres, and identifies the Central Area of Greenock town centre as the sequentially preferred location for town centre uses within Inverclyde. Within the Retail Core, the Plan places a restriction on non-Class 1 uses to ensure no more than 25% of identified street frontages are in non-retail use. The Outer Area of the town centre is divided into different character areas, within which a specific range of uses are supported. A design charrette was held for Greenock town centre in March 2016. This resulted in the publication of the Greenock Town Centre Masterplan, which sets out the aspirations and a development framework and action plan for the town centre. One of the key proposals set out in the development framework is the enhancement of the Oak Mall with new mixed uses, including leisure uses fronting onto Clyde Square.

Trends
The trends in the different areas of Greenock town centre are shown in figures 1 to 4 and tables 1 and 2, below. Trends are shown for retail, where the floorspace is split into convenience (food and drink), comparison (clothes, shoes etc), service retail (hire and repair) and vacant units and for non-retail, which includes leisure uses (restaurants, gyms etc.), offices, service business (hairdressers, banks etc.) and vacant units for the retail core, the rest of the central area and the outer area of Greenock town centre.
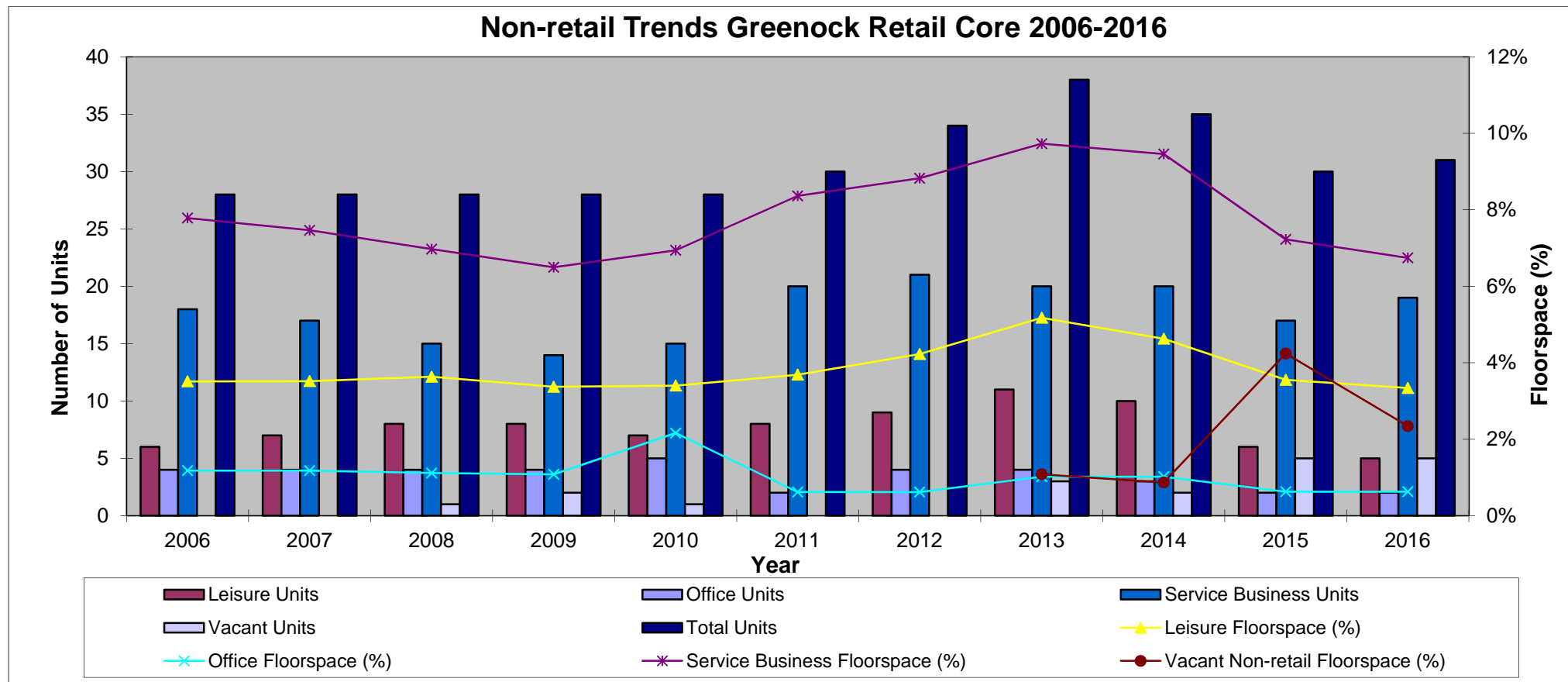
Multiple stores are those with a number of branches for a single firm. They make up the majority of retail stores in both convenience (e.g. Tesco, Morrisons, corner shops) and comparison (e.g. Topshop, Office, Carphone Warehouse) goods. Trends at the national level are discussed later in this report, but generally comparison multiple stores are moving from smaller stores in a large number of centres to concentrating on large stores in the larger retail centres. The opposite is the case for convenience stores, where there is a move from a small number of large out-of-town stores to a larger number of 'local' or 'express' stores in town and local centres.

Figure 1 – Changes in retail units within Greenock retail core 2006-2016
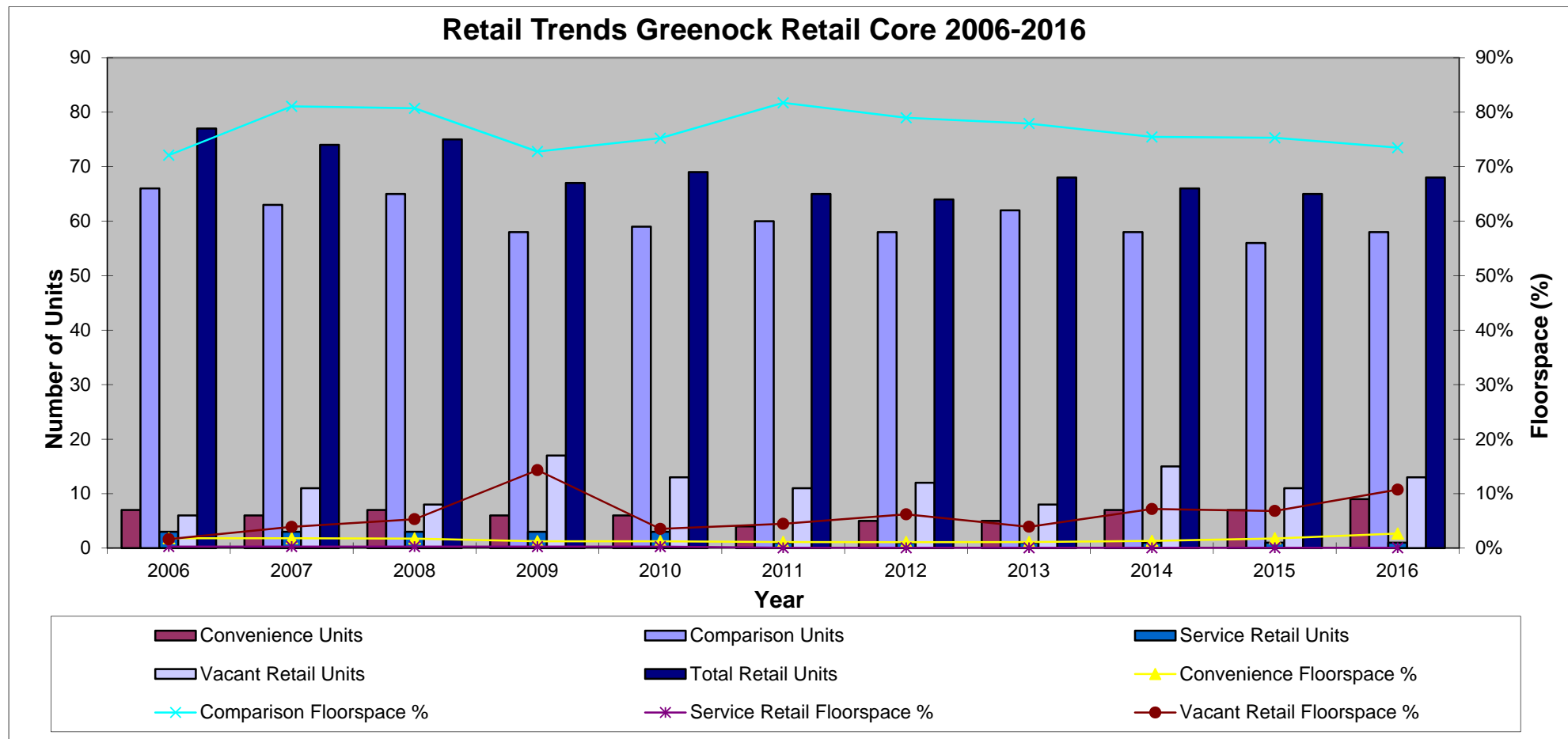
- The number of units and proportion of floorspace in use for convenience retailing has increased slightly overall (from 7 units to 9 units and 2% to 3%), despite falling between 2006 and 2011.
- The number of comparison units has fallen fairly steadily throughout the 2006-2016 period, from 66 to 58. The proportion of floorspace in comparison use has varied, but was almost the same in 2016 (73%) as in 2006 (72%).
- The number of vacant units, and the proportion of vacant floorspace, spiked during the recession in 2009. While the proportion of vacant floorspace fell back immediately, the number of units took longer to recover, with both the quantity of vacant floorspace and number of vacant units higher in 2016 (13 units and 11% of floorspace) than in 2006 (6 units and 2% of floorspace).
- The total number of units fell to 2012. It has increased since but is still lower than in 2006 (68 units compared to 77). The proportion of retail floorspace had fallen slightly but has increased to be slightly higher in 2016 than 2006 (see table 1 below).

Non-retail Trends Greenock Retail Core 2006-2016

- The number of leisure units and proportion of leisure floorspace was increasing up to 2013 but has fallen slightly overall from 6 units making up 4% of total floorspace in 2006 to 5 units and 3% of floorspace in 2016.
- The number of office units was small (4 units) but fairly steady to 2013 but has fallen to 2 units in 2016. The proportion of floorspace in office use was 1% in 2006 and has fallen overall to less than 1% in 2016.
- Service businesses make up the largest proportion of non-retail floorspace, increasing up until 2013 to 10%, but falling quite sharply to 7% in 2015 and 2016. The number of service business units followed a similar pattern but has not fallen off in the same way, remaining at around 20 units.
- Vacancies were rare up until 2013. Since then there have been vacant units every year, with a large increase in the proportion of vacant floorspace in 2015 to 4% that has fallen to 2% in 2016.
- The total number of non-retail units rose up to 38 in 2013. It has fallen back since to 31, but this is still slightly higher than in 2006 (28).
- There had been an increase in the amount of non-retail floorspace in the last few years up to 16% until 2016 when it fell below 2012 levels (13% compared to 14%, see table 1 below).

Table 1 – Make up of Greenock Retail Core 2012-2016

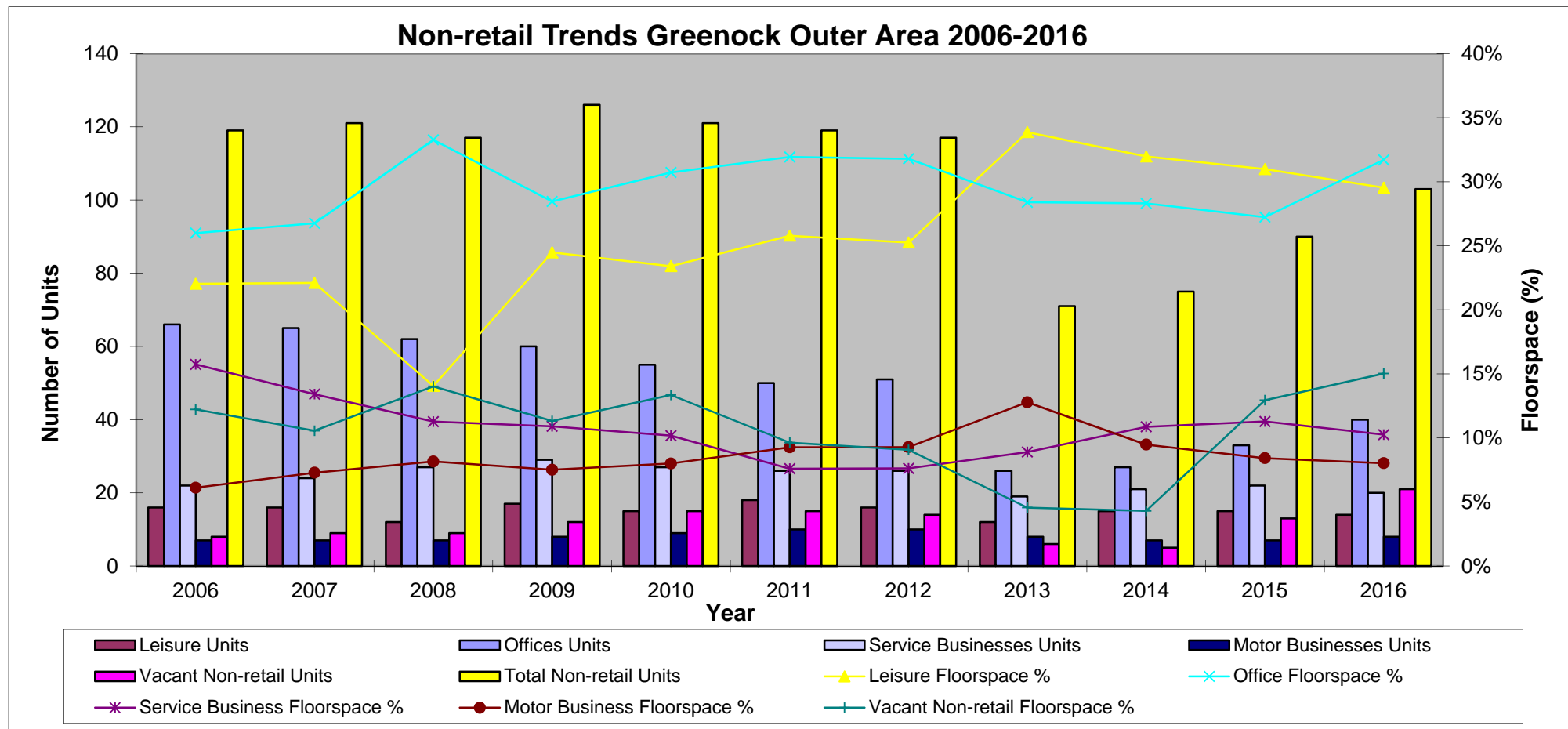| Retail	2012 sq m	2012 no units	2013 sq m	2013 no units	2014 sq m	2014 no units	2015 sq m	2015 no units	2016 sq m	2016 no units
Convenience	1%	5	1%	5	1%	7	2%	7	3%	9
Comparison	79%	58	78%	62	75%	58	75%	56	73%	58
Service	0%	1	0%	1	0%	1	0%	1	0%	1
Under Conversion	0%	0	0%	0	0%	0	0%	1	0%	0
Vacant	6%	12	4%	8	7%	15	7%	11	11%	13
Total Retail	**86%**	**76**	**83%**	**76**	**83%**	**81**	**84%**	**76**	**87%**	**81**
Retail Multiples (% total retail floorspace)	93%	49	92%	47	93%	45	89%	40	87%	39
Comparison multiples (% of total comparison floorspace)	85%	44	86%	42	83%	38	80%	35	74%	33
Non-retail										
Leisure	4%	9	5%	11	5%	10	4%	6	3%	5
Offices	1%	4	1%	4	1%	3	1%	2	1%	2
Service Businesses	9%	21	10%	20	9%	20	7%	17	7%	19
Motor Businesses	0%	0	0%	0	0%	0	0%	0	0%	0
Other vacant	0%	0	1%	3	1%	2	4%	5	2%	5
Total Non-retail	**14%**	**34**	**17%**	**38**	**16%**	**35**	**16%**	**30**	**13%**	**31**

Multiple retailers
The majority of retail floorspace, particularly comparison floorspace, is made up of multiple retailers. The proportion of retail floorspace and number of retail units occupied by multiple retailers has fallen steadily since 2012 however, with a larger fall in both units and floorspace in use for multiple comparison uses. This reflects the trends identified in the Strategic Development Plan Proposed Plan Background Report 5 on the Network of Strategic Centres, for multiple retailers to locate within a smaller number of centres.

Figure 3 – Changes in retail units within Greenock Outer Area 2006-2016
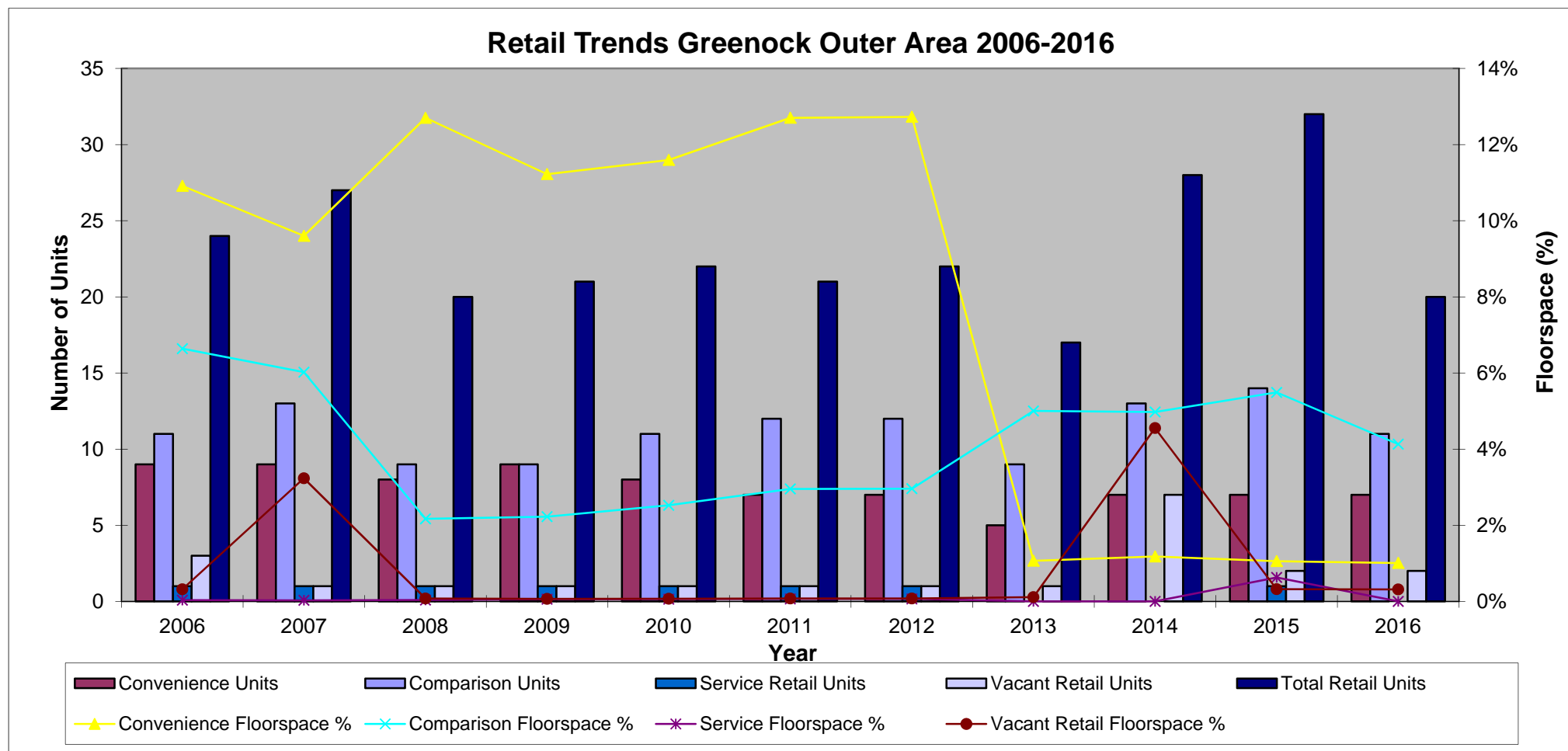
- The number of convenience units has fallen slightly from 9 to 7. The proportion of floorspace in use for convenience retailing had been increasing up to 2012 but fell dramatically in 2013 when Morrison's was moved into the Central Area in the Proposed Local Development Plan.
- The number of comparison units has varied but was the same in 2016 as in 2006 (11 units). The proportion of floorspace in comparison use fell sharply in 2008 to 2%, then recovered slowly up until 2015 but has fallen overall from 7% to 4%.
- The number of vacant units and proportion of floorspace has been low, 3 units or less and less than 1% of floorspace, throughout the period, with a high of 7 units making up 5% of floorspace in 2014.
- The total number of retail units has fallen overall from 24 in 2006 to 20 in 2016, but has varied over the period, hitting a high of 32 in 2015.

Figure 4 – Changes in non-retail units within Greenock Outer Area 2006-2016

Non-retail Trends Greenock Outer Area 2006-2016

Legend:
- Leisure Units
- Offices Units
- Service Businesses Units
- Motor Businesses Units
- Vacant Non-retail Units
- Total Non-retail Units
- Leisure Floorspace %
- Office Floorspace %
- Service Business Floorspace %
- Motor Business Floorspace %
- Vacant Non-retail Floorspace %

- The number of leisure units has fallen slightly from 16 in 2006 to 14 in 2016, while the proportion of floorspace in leisure use has increased from 22% to 30%.
- The number of office units fell from 66 in 2006 to a low 26 in 2013, but has since risen steadily to 40 in 2016. The proportion of floorspace in office use has increased overall from 26% to 32%.
- The number of service business units rose from 22 in 2006 to 29 in 2009, but has fallen steadily since to 20 in 2016. The proportion of floorspace in business use followed an opposite pattern, halving from 16% to 8% in 2011 before rising to 10% in 2016.
- The number of vacant units was increasing steadily up to 2011 from 8 to 15, before falling to 5 in 2014. Since then, they have increased to 21 in 2016. The proportion of vacant floorspace fell from 12% in 2006 to 4% in 2014, but has climbed to a high of 15% in 2016.
- The total number of non-retail units was around 120 from 2006 to 2012 but fell to 71 in 2013. Since then it has increased steadily to 103 in 2016.
- There had been an increasing amount of non-retail floorspace, from 83% to 95% (see table 1 below).

Table 2 – Make up of Greenock Outer Area 2012-2016

Retail	2012 sq m	2012 no units	2013 sq m	2013 no units	2014 sq m	2014 no units	2015 sq m	2015 no units	2016 sq m	2016 no units
Convenience	13%	7	1%	5	1%	7	1%	7	1%	7
Comparison	3%	12	5%	9	5%	13	5%	14	4%	11
Service	0%	1	0%	0	0%	0	1%	1	0%	0
Under Conversion	1%	1	5%	2	4%	1	2%	8	0%	0
Vacant	0%	1	0%	1	5%	7	0%	2	0%	2
Total Retail	**17%**	**22**	**11%**	**17**	**15%**	**28**	**9%**	**32**	**5%**	**20**
Retail Multiples (% total retail floorspace)	72%	3	3%	1	4%	4	6%	4	8%	3
Comparison multiples (% of total comparison floorspace)	0%	0	0%	0	6%	1	2%	1	0%	0
Non-retail										
Leisure	25%	16	34%	12	32%	15	31%	15	30%	14
Offices	32%	51	28%	26	28%	27	27%	33	32%	40
Service Businesses	8%	26	9%	19	11%	21	11%	22	10%	20
Motor Businesses	9%	10	13%	8	9%	7	8%	7	8%	8
Other vacant	9%	14	5%	6	4%	5	13%	13	15%	21
Total Non-retail	**83%**	**117**	**89%**	**71**	**85%**	**75**	**91%**	**90**	**95%**	**103**

Multiple retailers
Multiple retailers make up a much smaller amount of floorspace in the outer area, with the change between 2012 and 2013 representing Morrison's being moved from the outer area to the central area in the Proposed Plan in 2013. There are fewer comparison uses in the outer area, and those that are located there are mainly independent, rather than multiple, retailers.

Current and Future Trends

Recent and predicted future social and economic trends were investigated as part of the development of the Strategic Centres Policy in the Proposed Clydeplan Strategic Development Plan (see Background Paper 5 – Network of Strategic Centres). This concluded that changes in disposable income and consumer behaviour, demography (ageing population) and technological changes e.g. the move to online retailing, have led to a change in how and where retailers locate. Comparison retailers are focussing on fewer stores in larger, stronger, centres. This, along with the store closures during the recession, has led to an increase in vacancies in centres, particularly outwith the retail core in secondary streets and beyond. At the same time, convenience retailers have moved toward a greater number of smaller stores within centres. This means that centres may become concentrated in a smaller area and less retail-oriented as policy shifts to locating a wider range of footfall generating uses in centres. There is therefore a need to consider the role and function of centres and what development is appropriate to support them, as well as investing to maintain their attractiveness to developers.

Analysis of National Survey of Local Shopping Patterns (2012) was also undertaken to support of the preparation of the Proposed Clydeplan Strategic Development Plan. This shows that Greenock's shopper population shrank by 13% between 2002 and 2012, mainly between 2002 and 2008 before a slight increase between 2008 and 2012. There was also a change in the pattern of where people from Greenock's core catchment shop with a 2% increase in people going to Braehead and a 4% increase in people coming to Greenock, while 3% less travelled to Glasgow City Centre.

Conclusions

Greenock retail core is dominated by retail uses and particularly comparison retail uses, which make up approximately three quarters of the total floorspace throughout the period from 2006 to 2016. The second largest use is service businesses, which only make up 10% of the overall floorspace with a small amount of leisure floorspace making up the rest of the occupied floorspace. Both retail and non-retail vacancies have risen between 2006 and 2016, with the trend being an increase over time.

The outer area of Greenock town centre has a very small proportion of retail uses and these have generally been dominated by comparison uses, although there is a more even split between the number of convenience and comparison units. Removing the impact of Morrisons, comparison uses have also dominated the proportion of floorspace, with convenience making up only 1-2% with very few vacant retail units. In 2006, the majority of units and floorspace was in use as offices and this increased from 26% in 2006 to 32% in 2012. In 2013, leisure overtook offices as the greatest proportion of floorspace until 2016 when they switched positions again at 30% leisure and 32% offices.

The increasing level of both retail and non-retail vacancies in both the retail core and the outer area, along with the trends identified in the background report to the Proposed Strategic Development Plan, indicate there is a need to rethink the policy approach to town centres, with greater flexibility needed to allow them to respond to changing demands from both retailers and shoppers.

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