SHAWLANDS TOWN CENTRE ACTION PLAN
HEALTH CHECK

1.0 Background

1.1 Town centres act as a focus for the community they serve. In addition to retailing, they also provide other key services, and they are important employment locations. They are accessible by walking, cycling, public transport, and by car. Town centres are not static. The mix of uses and the relative importance of centres can change over time as a result of many factors, including changes in population, market conditions and trends, new investment in the centre, and the emergence of attractive alternative retail locations.

1.2 There is a statutory duty on development plans to contribute to sustainable development, and this requirement is embedded in Scottish Planning Policy (February 2010) (SPP) which sets out the Scottish Government's policy on town centres and retailing. Amongst other issues the SPP indicates that:

- *'retail and leisure uses are fundamental to the concentration of other activities located in town centres';*
- *the range and quality of shopping, wider economic and social activity, integration with wider residential areas and the quality of the environment are key influences on the success of a town centre;*
- *it is essential that town centres provide a high quality, inclusive and safe environment;*
- *the evening economy should be encouraged and managed in appropriate centres;*
- *all retail, leisure and related developments should be accessible by walking, cycling and public transport*

1.3 Scottish Planning Policy further advises that town centre strategies are the key method for delivering improvements to town centres, ranging from small scale public realm works to assembling sites to accommodate larger scale development which aids regeneration. Town centre strategies need to be set within the context of the development plan, and they provide the detailed framework which enables action to be undertaken.

1.4 The approved Glasgow and the Clyde Valley Joint Structure Plan 2006 (including the 4th Alteration to it which sets out the policy with respect to commercial centres) recognises that town centres are important economic resources, and it is important not to divert investment from them. It indicates the potential impact of proposals on the vitality and viability of town centres is of particular concern. Safeguarding and enhancing town centres, together with improving the range and distribution of community facilities within town centre catchments, are important Structure Plan considerations. Finally, Shawlands is specifically identified by the Structure Plan as a town centre to be safeguarded.

1.5 Shawlands town centre is a traditional Glasgow town centre in that it is mainly composed of retail and commercial units on the ground floor of tenements and is largely linear as a result. At the centre of Shawlands town centre is a 1960's covered shopping mall fronting onto Kilmarnock Road. It therefore offers a different type of shopping unit from the traditional tenement/commercial pattern of the older town centre properties.

1.6 The town centre plays an important role in Glasgow's complex network of town centres, being one of five 'Tier 2 Major Town Centres' within the City. The other Tier 2 town centres are Easterhouse, Parkhead, Partick/Byres Road, and Pollok. In terms of importance, the Tier 2 town centres are second only to the City Centre.

1.7 The Principal Retail Area (PRA) forms the retail core of the Town Centre, and it is identified in City Plan 2 as encompassing all of the Shawlands Arcade, and the premises at 14-128 Kilmarnock Road, all of which are on the west side of Kilmarnock Road. The policy approach is to support an appropriate balance between retailing and other uses, to maintain the Town Centre's vitality and viability. Within the PRA there is a planning policy threshold whereby the City Plan seeks to maintain the level of Class 1 (Shops) units at 70% or more.

Class 1 (Shops) are defined by the Town and Country Planning (Use Classes) (Scotland) Order 1997, as uses which provide a service principally to visiting members of the public. In addition to 'shops', Class 1 (Shops) therefore also includes other uses such as post offices, travel agents, hairdressers, and dry cleaners.

1.8 City Plan 2, which was adopted by the Council on 7 December 2009, recognises the importance of Tier 2 Town Centres, and aims to encourage and maintain the network of centres, and focus appropriate development in them, in order to meet the needs of Glasgow's residents. While City Plan 2 acknowledges that the City Centre is the dominant retail and commercial centre, it also sets out important Policy Objectives for each of the Tier 2 Town Centres. Its Policy Objectives for Shawlands recognise that while Shawlands has a strong night-time economy, in addition to its retail offer, it would benefit from an improvement in its non-food shopping offer. In addition, it also supports proposals to redevelop or renew the town centre, enhance its vitality and viability, and increase the range of uses in it, particularly where the Principal Retail Area (the retail core) is strengthened and compliments the mix of uses

1.9 It is within this broad context that the Shawlands Town Centre Action Plan is being developed, and this health check of its vitality and viability has an important role to play in informing the TCAP's proposals for maintaining and enhancing the town centre. The figures used here are sourced from the Council's retail outlets survey (unless stated otherwise), and because it has been regularly updated over the years, the survey allows a picture of how Shawlands town centre has changed in that period to be painted.

1.10 While the outlets survey provides factual information, it is important that conclusions are considered in conjunction with other sources of information. The Council undertook a Customer Survey in the summer of 2009 to identify the issues which are important to those who use Shawlands town centre. The initial analysis of the survey, which received around 1200 responses, is incorporated in this report. The resulting picture of the town centre could help inform future policy and investment.

1.11 This 'health check' is therefore aimed at:

- Contributing to the comprehensive information and analysis base of the Shawlands town centre action plan.
- Ensuring compliance with national planning guidance (SPP8, and draft SPP) on town centre action plans;
- Identifying trends over time, and thereby establishing if the town centre's vitality and viability are improving, static or declining;
- Potentially informing planning policy and investment decisions.

2.0 Summary of Findings

2.1 The following issues have emerged from this health check:

- The Council's population and household projections to 2016 for the wider Shawlands area indicate 1% and 8% growth respectively, which suggests the population will remain stable and new households in the area are likely to be relatively small in size;
- The Council's 2009 Customer Survey indicates that Shawlands Town Centre serves a relatively local catchment area, with 45% of respondents walking to it, and 40% using a car. Although the town centre is well served by public transport, the survey indicates only 12% use it to access the town centre;
- The community around Shawlands town centre is densely populated and is also served by smaller town centres such as Strathbungo, Victoria Road, Battlefield and Mount Florida. These town centres provide shops and services of a more local nature than Shawlands town centre, which provides higher order facilities. Additionally, the residents are served by the nearby food superstore at Riverford Road and also Auldhouse Retail Park which offers 'bulky goods';

- Four different areas with their own characteristics can be identified, with the Arcade and the area opposite it being the dominant areas for shopping and evening economy activities respectively;
- Comparison shopping dominates the town centre, with around twice the level of convenience shopping floorspace. Generally, the Shawlands Arcade has modern, larger units, which tend to offer comparison shopping. It also benefits from planning policy which directs retailing there, it has dedicated off-street car parking, and good public transport accessibility. 60% of comparison shops in the town centre are very small, however, being less than 100 sqm gross floorspace, and they are generally located in the secondary town centre area.. This reflects the fact that most of the town centre is composed of small units on the ground floor of residential tenements.
- The footfall survey shows the Arcade/PRA is the single most visited area in the town centre. and that around 80% of town centre footfall occurs on the western side of Kilmarnock Road (the PRA side/Arcade side). Conversely, however, the customer survey strongly indicates respondents are concerned with the quality of the Arcade, and City Plan 2 recognises the centre's comparison offer could be improved;
- The Competition Commission found that a high proportion of weekly or main food shopping trips were undertaken by shoppers in the UK within stores which are larger than 2,300 sqm gross floorspace. In Shawlands town centre there are no convenience (food) stores over 2,300 sqm gross floorspace, but the customer survey did not highlight a concern with the adequacy of convenience shopping in the town centre. This is perhaps because the edge of (town) centre food superstore at Riverford Road and the large food superstore at Titwood Road appear to offer the main food function for shoppers, and the Town Centre's small convenience outlets offer complementary 'top-up' shopping opportunities. Based on this, it might be concluded that the convenience shopping requirements of the catchment population are generally met..
- While the Customer Survey raises the lack of electrical goods offer in the town centre, the point is not strongly made. With the possible exception of electrical goods therefore, the customer survey does not highlight that there is a significant concern about the level or quality of bulky goods provision in the town centre;
- A significant majority of independent operators are located within the secondary town centre area, reflecting the smaller units found there compared to the larger outlets within the PRA. As a result the secondary town centre area could be more attractive to niche/specialist operators than the PRA.
- National multiple retailers (retailers with outlets throughout the country) tend to prefer larger, modern units, and consequently around 50% of those present in Shawlands are found within the PRA where the Shawlands Arcade provides relatively large units;
- While service outlets consistently outnumbered shops between 2002 and2009, there was more floorspace in retail use than in service uses. This partly reflects the larger retail units in the Arcade and the smaller units sought by service uses elsewhere in the town centre. The Customer survey also confirms the importance of services to the town centre in that around 80% of respondents link shopping trips with other purposes such as visits to café's/restaurants;
- Commercial uses have grown by 13% (9 units) since 2002, including a doubling of the number of estate agents and the trebling of the number of hot food shops. Despite this, banks and other financial services operators continue to dominate the commercial sector in Shawlands town centre;
- In terms of its evening economy, perhaps the most significant change since 2002 has been the near doubling of the number of public houses from 8 to 14. The number of café's/restaurants remained stable, ranging from 20 to 22 units. The vibrant evening economy in Shawlands was highlighted as a positive feature in the Customer Survey, although it was also associated with concerns surrounding, litter, noise and personal safety;
- There are no significant leisure uses within the town centre. The Customer Survey indicates that perhaps accessibility between Queen's Park and the town centre might be improved;
- The Customer Survey indicates that shoppers suggest reducing vacancies in the town centre is the most important improvement which could be made, but the survey

also indicates a concern with the quality of the Shawlands Arcade. The number of vacant units in the town centre fell from 35 units in 2002 to 25 units in 2009, indicating continued interest in investing there. The proportion of vacant units in the PRA was consistently higher than in the rest of the town centre between 2002 and 2009. This pattern could be considered unusual as vacant units might often be anticipated at peripheral town centre areas which might be more marginal in economic terms than its core area.

3.0. Characteristics of Shawlands Town Centre

Future Population and Household Change

3.1 In 2008 the Council produced its own population and household projections for the City for the period 2006-2016 based on the Community Planning Partnership (CPP) areas. That report makes assumptions about natural change in population, migration and planning policy in its projections. The report indicates that regeneration activity will affect areas of the City differently, particularly as a result of projects associated with the Clyde Gateway initiative and the 2014 Commonwealth Games. It is anticipated that these projects will result in substantial population gain in the affected areas (Calton and East Centre CPP area - 13% increase).

3.2 Due to the availability of relevant statistics, and for the purpose of illustrating possible population and household change within the context of this report, it has been assumed that, broadly, Shawlands town centre serves the three CPP areas of Pollokshields and Southside; Langside and Linn; and Greater Pollok and Newlands/Auldburn. It should not, however, be assumed that this area represents the retail catchment area of Shawlands town centre. Table 1 illustrates the projected population change within each of these areas, and when combined with each other.

Table 1: Projected Population Change 2006-2016

	2006	2016	Change 2006-2016	% Change
Linn and Langside	50,568	48,695	-1873	-4%
Pollokshields and Southside Central	50,908	53,135	2,227	4%
Greater Pollok and Newlands/Auldburn	55,933	57,200	1,267	2%
Total	157,409	159,030	1,621	1%

Source: Glasgow City Council, "People and Households in Glasgow, Current Estimates and Projected Changes 2006-2026"

3.3 Table 1 shows that while the population in the wider Shawlands area is projected to experience a small level of growth (1%) in the 2006-16 period, there will be local variations which range from 4% growth to 4% decline.

3.4 Table 2 illustrates the projected change in household numbers. It shows that by 2016 the number of households in the wider Shawlands area is anticipated to grow by 8%. Given the population is expected to grow by only 1% in the same period, the new households will be small in size.

Table 2: Projected Change in Household Numbers 2006-2016

	2006	2016	Change 2006-2016	% Change
Linn and Langside	25,133	26,323	1,190	5%
Pollokshields and Southside Central	24,604	27,682	3,078	13%
Greater Pollok and Newlands/Auldburn	24,047	26,029	1,982	8%
Total	73,784	80,034	6,250	8%

Source: Glasgow City Council, "People and Households in Glasgow, Current Estimates and Projected Changes 2006-2026"

3.5 In order to understand the characteristics of Shawlands Town Centre, it is necessary to analyse its retail offer, the other services it provides, and how the town centre has changed recently. The following broad outline of the town centre's characteristics is based on the 2009 outlets survey information.

Distribution of Uses

3.6 Shawlands town centre boundary, as defined in City Plan 2, is relatively tightly drawn around the retail and service uses on and immediately around the Kilmarnock Road and Pollokshaws Road areas. Outwith the boundary, but nearby, there are a number of outlets which contribute to the wider attractiveness of Shawlands town centre, and these are included in this analysis for that reason.

3.7 It is not uncommon for different types of uses to concentrate, or cluster, in different parts of larger town centres. This clustering characteristic is apparent in Shawlands town centre where there are, broadly, four relatively distinct areas, each with its own 'specialisation'. In addition, town centres often have an 'anchor' store (and sometimes several) depending on the size of the centre, which are generally a large food store(s) and/or another large outlet selling comparison goods. There is no obvious single anchor store within Shawlands town centre, but perhaps the centre's two medium sized foodstores, and the Shawlands Arcade, fulfil this role.

Shawlands Arcade (The Arcade)

3.8 Shawlands Arcade (the Arcade) is at the Town Centre's core. It was developed in the 1960's and consists of a covered T-shaped mall, with its principle frontage being to Kilmarnock Road. The Arcade provides the town centre's concentration of larger sized, more modern, non-food shop units, and a medium sized food store. In contrast to this, a regular 'Arts & Crafts' market has recently begun operating from the Arcade, and this has added to the retail offer of both the Arcade and the town centre. Given these characteristics the Arcade acts as an anchor location for the town centre. It is entirely within the Principal Retail Area (PRA) of the town centre, where City Plan 2 aims to maintain a high proportion of retail outlets. The Arcade is accessed from Kilmarnock Road via a ramp which conceals the underground car parking (350 free spaces) and servicing area. The ramp, however, creates a barrier to pedestrian movement and access to the Arcade from Kilmarnock Road.

3.9 In addition to shops, the Arcade also incorporates a two storey office building (City Wall House) and two multi storey-car parks. These are the largest off-street car parks serving the town centre, and together they provide over 300 dedicated parking spaces. To the rear of the Arcade, at Pollokshaws Road, lies 1960's flatted accomodation, some of which is owned by Glasgow Housing Association (GHA) and managed by New Shaws LHO. Some others are owner occupied.

Opposite Shawlands Arcade

3.10 On the opposite side of Kilmarnock Road from the Arcade, there is a cluster of bars, and restaurants. These tend to be relatively small units located on the ground floor of three and four storey tenemental properties. Given its mix of uses, the area is the focus of the town centre's evening economy, and its lack of a retail focus means it does not fall within the town's Principal Retail Area.

Pollokshaws Road

3.11 This is a peripheral town centre area but while it is a focus for shops it also offers a mix of other uses. The town centre's largest food store is located here, but the remainder of the shops and commercial units tend to be small, and on the ground floor of tenemental properties. In addition to shops, which tend to be non-food shops, the area includes a mix of businesses within the service sector, such as hairdressers and café's.

Kilmarnock Road, South of the Arcade

3.12 The remainder of the town centre, south of the Arcade, is also a peripheral area, and it contains a concentration of commercial uses such as estate agents. This area is also characterised by small units on the ground floor of tenemental properties.

Leisure, Cultural and Arts Facilities

3.13 There are no significant leisure facilities within the town centre. On the west side of Pollokshaws Road, adjacent to the town centre and Shawlands Primary School, there is a bowling club. On the east side of Pollokshaws Road, again outwith the town centre, lies Queens Park which provides a significant leisure facility for residents of Shawlands and beyond. The park also contains a number of important leisure facilities, including Langside Hall, display, glasshouses, boating pond, pitch and putt, tennis courts, five-a-side football courts, children's play area and picnic areas with benches.

Town Centres and Retail Locations Around Shawlands Town Centre

3.14 Shawlands town centre lies in an area of the city which is densely populated, being dominated by tenemental flatted properties. The nearby communities to the north and east of Shawlands town centre are served by a number of smaller town centres (Tier 3 Local Town Centres including Strathbungo, Victoria Road, Battlefield, and Mount Florida. These generally provide for the day to day needs of communities, and they have a different function from Shawlands town centre which offers a wider range of goods and services.

3.15 Other notable shopping locations are found close to Shawlands town centre. At Riverford Road, there is a modern food superstore, and although it is not within the town centre, the superstore is close enough to contribute to the town centre's attraction in a wider sense, allowing the possibility of linked trips between it and the town centre to be made. Another food superstore is found relatively close to the town centre at Titwood Road. While this is a stand alone store, and is more distant from the town centre than the Riverford Road store, it also provides a main shopping offer for the residents in the wider Shawlands area. In Queen's Park a Farmer's Market operates on two Saturday's every month, offering a range of fresh and/or organic produce. In addition, a relatively short distance to the south-west of the Riverford Road superstore lies Auldhouse Retail Park. It contains 'bulky goods' operators who offer a range of products which are generally of a size which requires them to be delivered or taken away by car or van at the time of purchase. There are, therefore, a number of shopping locations and opportunities relatively close to Shawlands town centre which together offer a range of products.

Accessing Shawlands Town Centre

3.16 From the Customer Survey, Shawlands essentially appears to serve a relatively local catchment area, with 45% of respondents walking to the town centre. A further 40% indicated they use a car either all the time, or sometimes. It is also interesting to note that although the centre is well served by public transport, only 12% indicated they travel to the town centre by bus, train or taxi.

Scale and Function of Shawlands Town Centre

3.17 In order to assess the patterns of change in the uses to which premises within Shawlands town centre have been put over time, the results of the Council's January 2002, July 2005 and December 2009 Outlets surveys have been compared. The 2002 data is the earliest available, and the 2009 survey is the most recent. Each of these surveys is essentially a snapshot of the use to which each of the outlets in the town centre is being put. Floorspace data is sourced from the Glasgow City Assessor and is added to the outlets survey information in order to enhance the analyses which can be undertaken. Comparing individual surveys which are separated by several years can disguise important short term issues relating to how a centre, or part(s) of a centre, performed outwith the analysis. On the other hand, looking at change over a longer period reduces the skewing effect which short lived, unusual changes can have on the analysis, thereby allowing more robust conclusions to be drawn from trends.

3.18 In addition to the outlets survey, the results of the Council's 2007 and 2008 surveys of pedestrian movements in Shawlands town centre have also been analysed. These are the only footfall surveys to have been undertaken by the Council in the town centre, but they reveal some interesting patterns when combined with the results of the outlets survey for 2009.

3.19 Finally, a set of detailed Tables from which each of the Charts and Tables have been sourced is contained in Annex 1 of this health check.

Number of Outlets in the Town Centre

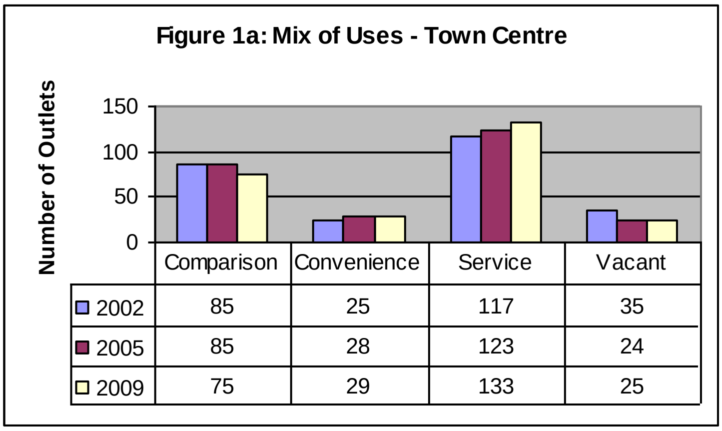
3.20 The number of units in the town centre is an important factor in determining the range and function of uses which can locate there. It is not the only factor, however, as other matters such as planning policy, accessibility, costs, size of premises, etc, are also important considerations for operators who wish to locate their business within a town centre.

Table 3: Number of Units in Shawlands Town Centre

	2002	2005	2009
PRA	58	52	53
Secondary TC Area	204	208	209
Total	262	260	262

3.21 As might be expected, Table 3 shows that the number of units in the town centre remained relatively stable in the 2002 to 2009 period. Interestingly, however, it also shows that there has been a reduction in the number of units in the PRA, while there were increasing numbers in the secondary town centre area. As the town centre and PRA boundaries did not alter in this period, the changes appear to be the net result of the sub-division and merging of existing units, as operators seek premises which match their particular requirements.

Mix of Uses in the Town Centre

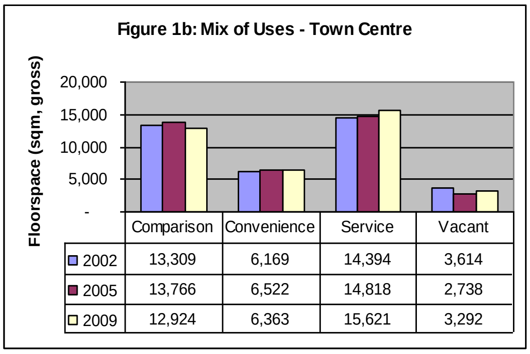


3.22 The mix of uses in the town centre contributes to its character, role and function. The uses can be categorised into four groups: comparison (non-food products); convenience (groceries, newspapers, etc); services (e.g. banks, estate agents, hairdressers); and vacant premises. Figure 1a outlines the number of outlets in each of the categories, and it is clear that since 2002:

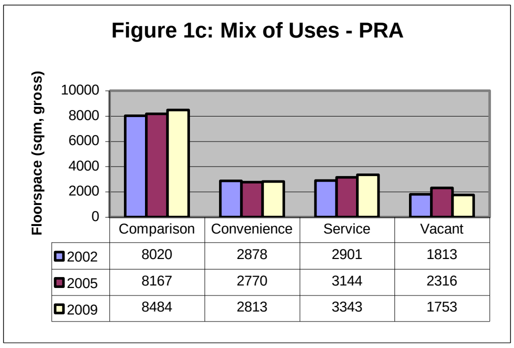
- The total number of outlets in the town centre has remained stable;
- service uses have consistently outnumbered retail units;
- The dominance of service uses is increasing, while the number of retail units has not changed significantly;
- comparison shopping dominates the retail sector; and
- there's been a 29% (10 units) reduction in vacancies since 2002, with 13% of units being vacant in 2002 compared to 9-10% in 2005 and 2009. This reduction appears to contrast with the Customer Survey which indicates concern with the level of vacancies in the town centre.

3.23 The importance of service uses is clear from the Customer Survey which indicates that around 80% of respondents visit the town centre on trips which link shopping with other purposes such as leisure and cafés/restaurants.

3.24 Figures 1b and 1c outline the division of floorspace within the town centre and the PRA within the same categories used in Figure 1a.



	Comparison	Convenience	Service	Vacant
2002	13,309	6,169	14,394	3,614
2005	13,766	6,522	14,818	2,738
2009	12,924	6,363	15,621	3,292



	Comparison	Convenience	Service	Vacant
2002	8020	2878	2901	1813
2005	8167	2770	3144	2316
2009	8484	2813	3343	1753

3.25 Figure 1b indicates that within the town centre:

- there is more retail floorspace (comparison and convenience floorspace combined) than service floorspace;
- comparison floorspace is the dominant type of retail floorspace; and
- there was a reduction in vacant floorspace between 2002 and 2009.

3.26 Figure 1c shows that within the PRA:

- retail floorspace, but comparison shopping floorspace in particular, dominates;
- there has been fluctuation in the level of vacant floorspace, but it was at a similar level in 2009 as in 2002.

3.27 Table 4 indicates the average size of units in the town centre by their use. It could be concluded from it that, on average, the service and vacant units are found in the smallest premises in the town centre. A simplistic interpretation would suggest that vacant units are around the size which service uses prefer and this situation could offer an opportunity for Shawlands to further develop its service sector uses. That scenario, however, does not take into account other considerations such as planning policy (which seeks to support the centre's retail function), rental/lease arrangements, demand, etc. It is noteworthy that Figure 1a and 1b together show that while there are significantly fewer convenience outlets, on average convenience shops are markedly larger than comparison shops.

Table 4: Average Size of Unit (Sqm, Gross Floorspace) – Town Centre

	Comparison	Convenience	Service	Vacant
2002	157	247	123	103
2005	162	233	120	114
2009	172	219	117	132

3.28 The dominance of retail floorspace, and comparison shopping floorspace in particular, within the PRA could be expected given the town centre's Tier 2 Major Town Centre status in City Plan 2.

Comparison Retail Outlets

3.29 The size of premises within the town centre can influence the type of retailers which are attracted to it. Generally, large national retailers often seek larger sized stores which will enable them to carry a wider range of products, while independent traders often seek smaller units. From Table 4 it can be seen that the average size of comparison store in Shawlands town centre is now around 175 sqm, but when the actual sizes of premises is examined it becomes clear that there are essentially two important groups - those below 100 sqm gross floorspace and those which are larger. Figure 2a indicates the numbers in each of these groups within the whole town centre, while Figure 2b sets out the position within the PRA.

3.30 It can be determined from Figure 2a that during the 2002-2009 period more than 60% of comparison shopping units in the town centre were smaller than 100 sqm gross floorspace. This composition reflects the town centre's physical format whereby there are a relatively large number of small shops on the ground floor of traditional residential tenement buildings, and a smaller number of larger units within the more modern PRA.

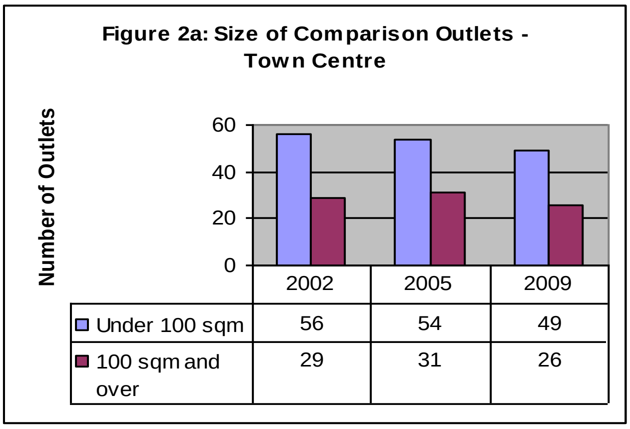


Figure 2a: Size of Comparison Outlets - Town Centre

3.31 The trends in the number of comparison shopping units within both of the size groupings are:

- the number of small units has decreased slightly; while
- the number of units of 100 sqm and more has remained relatively stable.

3.32 The reduction in the number of small comparison units could be the net result of premises changing to convenience or service provision, becoming vacant, or the merging of premises.

3.33 It is apparent from Figure 2b (below) that in the 2002 to 2009 period within the town centre:

- The total number of comparison outlets slightly reduced, primarily due to a decrease in the number within the secondary town centre area (also see Figure 1a);
- The figure has fluctuated within the PRA;

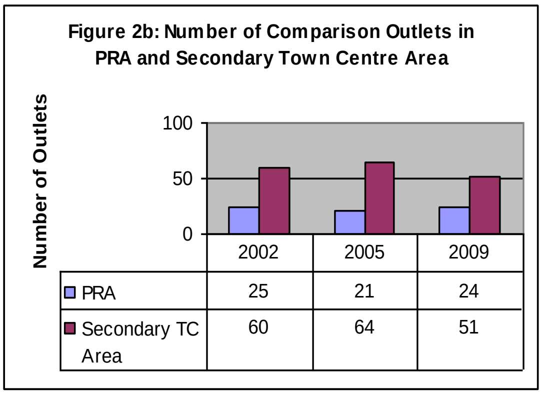


Figure 2b: Number of Comparison Outlets in PRA and Secondary Town Centre Area

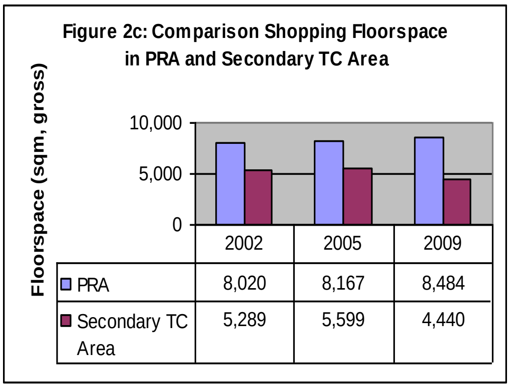


Figure 2c: Comparison Shopping Floorspace in PRA and Secondary TC Area

3.34 From Figures 2b and 2c it can be determined that the average size of comparison outlet in the PRA in 2009 was 354 sqm, but in the secondary town centre area it was 87 sqm. This indicates that while there are fewer comparison units in the PRA than in the secondary town centre, there is a greater concentration of comparison floorspace in the PRA.

3.35 The fluctuation in the number of comparison outlets within the PRA is not reflected in the trend in the level of comparison floorspace in the PRA. With regard to the secondary town centre area, however, the decreasing number of comparison units is reflected in a reduction in the level of comparison floorspace.

3.36 It is perhaps not surprising that comparison shopping provision is increasingly focused in the PRA, because in addition to City Plan policy directing retailing there, it also has larger floorplates, dedicated car parking; and is well served by bus. These characteristics could together make it more attractive to comparison retailers than other parts of the town centre.

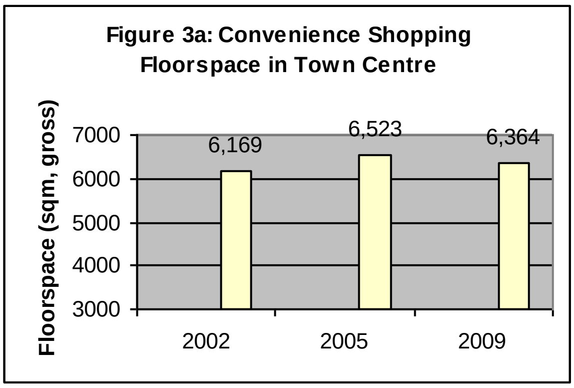
3.37 City Plan 2 recognises that there is a need to improve the quality of the town centre's comparison retail offer. It further indicates that there will be Council support for redevelopment proposals which contribute to the town centre's vitality and viability, and its range of town centre uses, particularly if they would strengthen the PRA.

3.38 In addition to being found in town centres, bulky comparison goods (e.g. electrical, DIY, and furniture products) are found in retail warehouse parks which are often located outwith town centres. These locations are normally accessed by car rather than by public transport, and provide an important function in the City's retail offer. While there are bulky goods operators within Shawlands town centre, the wider Shawlands area is also served by Auldhouse Retail Park, which contains a range of bulky goods operators. The Customer Survey indicates a lack of electrical goods availability in the town centre, but the point is not strongly made, and therefore there does not appear to be a significant concern about the level or quality of bulky goods provision in the town centre.

3.39 The Customer Survey revealed that Shawlands might benefit from the provision of some types of shop. Of the 650 respondents on the issue, 395 (61%) would like to see a department store, followed by gift shops (14%) and household goods (10%). Any future provision of these specific shop types is reliant on the market responding to consumer demands, rather than planning policy.

Convenience (Grocery) Retail Outlets

3.40 Convenience shopping (mainly groceries) is normally undertaken on a different basis from comparison shopping. There are generally two types of convenience shopping trips – weekly or less frequent 'main' shopping trips to large superstores in order to purchase the households convenience shopping needs, and 'top-up' shopping which is undertaken in order to supplement the main shopping. The size of convenience outlets in a town centre influences the range of products and the type of convenience shopping provided by an outlet, and therefore whether it caters for main shopping or top-up shopping. Smaller stores offer a limited range of products and therefore provide 'top-up' or 'basket based' shopping. In contrast, large superstores provide extensive product ranges and offer the opportunity to undertake weekly or less frequent main or 'trolley based' shopping trips.



3.41 Figure 3a indicates that while the level of convenience shopping floorspace in Shawlands town centre has fluctuated, overall there was a small increase in the 2009 survey compared to the 2002 survey.

3.42 The Competition Commission (Market investigation into the supply of groceries in the UK) found generally in the UK that a high proportion of large weekly shopping trips were undertaken in stores of over 1,400 sqm net floorspace (around 2,300 sqm gross floorspace). This threshold has therefore been used to analyse convenience shopping units in Shawlands town centre..

3.43 Table 5 indicates that within Shawlands town centre there are no convenience stores over 2,300 sqm (gross) floorspace. The town centre's two largest convenience stores are located at Pollokshaws Road and the Shawlands Arcade. Given their size, and the range of products they can therefore carry, both may tend to provide top-up, basket based shopping facilities rather than weekly or less frequent main shopping trips.

Table 5: Total Convenience Floorspace By Store Size (Sqm) (gross)

	2002	2005	2009
Total Floorspace in Stores Under 2,300 sqm	6,169	6,523	6,364
Total Floorspace in Stores 2,300 sqm and over	0	0	0
Total Floorspace	6,169	6,522	6,364

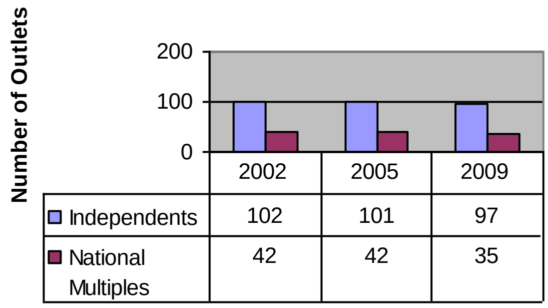
3.44 The lack of a large convenience store within the town centre may be partly due to the lack of a sufficiently extensive development site. In this context it is important to note that outwith the town centre's boundary, but relatively close to it, at Riverford Road and Titwood Road, there are large food superstores which provide a wide range of convenience goods, and some comparison goods. As a result they offer a main food shopping (trolley based) service to the surrounding community.

3.45 In relation to this issue, it is interesting to note that the Customer Survey sought views on what type of shops respondents would like to see in Shawlands, and a demand for further convenience shops did not feature. This may suggest respondents are satisfied with the convenience shopping offer available at Shawlands town centre, together with the large food superstores nearby.

Retailer Types

3.46 Independent retailers often tend to locate in small premises, and they are sometimes associated with creating and maintaining a town centre's local character. As they are small, independent retailers tend to be found outwith core retail areas, where the costs associated with premises may be lower than in the town centre core area (PRA), and they also often seek relatively small premises which are more suited to their business requirements. On the other hand, national multiple retailers which have stores throughout the country, generally tend to seek larger premises, that are located within, or close, to retail core areas.

Figure 4: Types of Retailer - Town Centre



3.47 Figure 4 demonstrates that within Shawlands town centre:

- independent retailers dominate despite a slight fall in their numbers;
- the number of national multiples also reduced over the period.

3.48 It is also useful to understand the distribution of independent and national multiple operators within the town centre, and this is indicated in Tables 6 and 7.

Table 6: Independent Operators – Town Centre			
	2002	2005	2009
PRA	14	10	14
Secondary TC Area	88	91	83
Total	102	101	97

3.49 With regard to independent operators, the Customer Survey 2009 suggests that some find the niche and specialist independent operators an attractive feature of the town centre, which could be built upon. It is clear from Table 6, however, that there has been a small drop in the number of independent operators in the secondary town centre area, and this reduction is reflected in the total for the town centre as a whole. A significant majority of independent operators are located within the secondary town centre area, where there are smaller units than those found within the PRA.

3.50 Table 7 shows that, overall, there was little change between the surveys of 2002 and 2009, with around 50% of national multiple operators, being found in the PRA, where the larger units are located.

Table 7: National Multiples – Town Centre			
	2002	2005	2009
PRA	20	19	17
Secondary TC Area	22	23	18
Total	42	42	35

3.51 The mix of independents and national multiples in Shawlands, and their location within the town centre, broadly reflects the pattern which might be anticipated given the relatively high proportion of small outlets in the secondary town centre area.

Commercial Uses

3.52 Commercial uses including banks, estate agents, and hairdressers, are important in maintaining and improving the vitality, viability and character of town centres. City Plan 2 aims to strike a balance between retail outlets and other uses in Shawlands town centre, and it encourages the retention of a relatively high level of retail use in the PRA, thereby directing commercial uses towards the secondary town centre area. It is important to note, however, that the change of use from retailing (shops) to some 'commercial' uses cannot be controlled through the planning system (e.g. a change from shop to hairdressers), and such changes can impact on the mix of retail and commercial uses within town centres.

3.53 From Table 8 it can be determined that in both 2002 and 2005 commercial uses accounted for 27% of town centre outlets, but this had increased to around 31% in 2009. This is, possibly, part of the trend of increasing numbers of service uses and falling numbers of vacant units in the town centre, as indicated in Figure 1a.

3.54 Perhaps the most notable changes in commercial uses between 2002 and 2009, indicated by Table 8, are the:

Table 8: Commercial Uses – Town Centre			
	2002	2005	2009
Banks, etc	11	10	10
Other Financial	25	22	24
Estate Agents, etc	8	9	15
Hairdressers	20	19	22
Travel Agents	5	5	2
Hot Food Shops	3	6	8
Total Commercial Uses – Town Centre	72	71	81
Total Number of Units in Town Centre (see Table 3)	262	260	262

- 13% (9 units) overall increase in commercial uses;
- approximate trebling of the number of hot food shops from 3 to 8 units; and
- an almost doubling in the number of estate agents from 8 to 15 units..

3.55 Banks and other financial operators (42%), together with hairdressers (27%), continue to dominate the commercial sector in Shawlands town centre..

Table 9: Commercial Uses - PRA			
	2002	2005	2009
Banks, etc	2	4	5
Other Financial	2	0	2
Estate Agents, etc	0	0	0
Hairdressers	1	0	0
Travel Agents	3	3	2
Hot Food Shops	0	0	1
Total - PRA	8 (11%)	7 (10%)	10 (12%)
Total Commercial Uses – Town Centre (see Table 8)	72	71	81

3.56 Table 9 indicates that generally there were no significant changes within the commercial sector in the PRA between 2002 and 2009, although there were 3 more banks in 2009 compared to 2002.

3.57 Overeall, within the PRA there are a limited number of commercial outlets, with banks and other financial services, travel agents and a hot food shop being the only types located there in 2009.

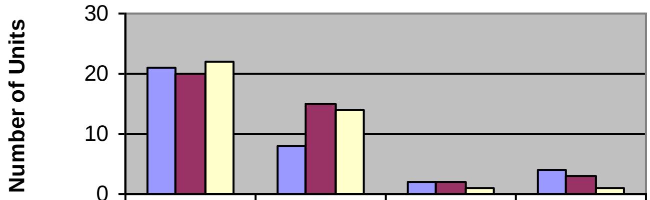
3.58 Table 9 also shows that the level of commercial uses in the PRA remained relatively stable between 2002 and 2009, ranging from 10% to 12%. It is clear, therefore, that commercial uses continue to be found largely within the secondary town centre area, reflecting planning policy, which encourages retail uses in the PRA.

Leisure/Cultural/Arts and Evening Economy Uses

3.59 Vibrant town centres are likely to offer a range of activities in the evening which attract people to the town centre after normal working and retailing hours. These uses are sometimes referred to as evening or night time economy uses, and can include leisure facilities.

3.60 Shawlands town centre is often attributed with having a strong evening economy as a result of the number of bars and restaurants located within its boundaries. This is a positive factor which could be built upon, as highlighted by the Customer Survey 2009, and City Plan 2. The Customer Survey also indicates, however, that litter and safety issues associated with the evening economy are concerns for those living nearby, and those using the town centre. Both the outlets survey and the Customer Survey 2009 highlight the lack of a cinema, community facilities, and arts facilities in the heart of the town centre.

Figure 5: Leisure/Evening Economy Uses - Town Centres



	Cafés and Restaurants	Public Houses	Amusement Arcades	Sauna/Sun Parlours
2002	21	8	2	4
2005	20	15	2	3
2009	22	14	1	1

3.61 Figure 5 indicates that, in terms of evening economy uses, perhaps the most notable trends between 2002 and 2009 have been:

- the near doubling in the number of public houses in Shawlands town centre from 8 to 14;
- while the number of café's and restaurants remained relatively stable, ranging from 20 to 22 outlets...

<u>Vacant Units</u>

3.62 The level of vacant units can be a broad indicator of the relative attractiveness of a town centre to investors and shoppers alike. This is clearly demonstrated in the responses to the Customer Survey which indicates that from the shoppers point of view reducing vacancies in Shawlands town centre is the most important improvement which could be made to it. Table 10 sets out the distribution of vacant units in the town centre.

Table 10: Distribution of Vacant Units			
	2002	2005	2009
Principal Retail Area (PRA)			
Vacant Units - PRA	15 (26%)	13 (25%)	10 (19%)
Total Units – PRA (**See Table 3**)	58	52	53
Secondary Town Centre Area (TC)			
Vacant Units - Secondary TC Area	20 (10%)	11 (5%)	15 (7%)
Total Units – Secondary TC Area **(See Table 3)**	204	208	209
Town Centre			
Total Vacant Units – Town Centre	35 (13%)	24 (9%)	25 (10%)
Total units – Town Centre **(See Table 3)**	262	260	262

3.63 From Table 10 it is clear that the number of vacant units within both the PRA and the Secondary TC Area decreased between 2002 and 2009, with a reduction from 13% in 2002 to 10% in 2009 within the town centre as a whole. It also shows that the proportion of units in the PRA which were vacant was consistently higher than in the rest of the town centre between 2002 and 2009. This perhaps gives vacancies in the PRA a greater visual impact than those elsewhere, and this may contribute to the serious concern with vacancy levels indicated in the Customer Survey. The higher proportion of vacancies in the PRA could perhaps be considered unusual as they may be anticipated at peripheral town centre areas which might be more marginal in economic terms compared to core areas (i.e. the PRA).

3.64 When looking at vacancy levels it is important to consider their possible causes. There will normally be some vacant units in a town centre for reasons such as shop leases ending, and growing businesses seeking larger premises elsewhere. Properties which are of poor physical quality, however, might generate little or no demand from investors, and town centres with relatively high vacancy levels will not be as vibrant or economically attractive to investors as they could be. Another possibility is a redevelopment scheme which could generate a relatively high number of vacancies for a short period as leases are terminated, but ultimately modern units and an improved shopping environment which are both attractive to operators and shoppers will emerge. Re-development does not, however, explain the level of vacancies in Shawlands, and therefore there are other reasons for vacancies there. Short-term vacancies could result from individual leases not being renewed (for a variety of reasons) or individual operators ceasing trading. These types of vacancy are relatively common and are not of particular concern. Vacancies become a concern, however, when their numbers continue to increase over time, and where many units remain vacant for a significant period of time, indicating they are not attractive to investors. It is notable, however, that Table 10 indicates the number of vacancies throughout Shawlands town centre decreased between 2002 and 2009. This improving situation perhaps suggests vacancy levels might not be considered to be a critical issue in Shawlands town centre, but the situation needs to be monitored regularly to identify any change to the downward trend.

Footfall in Shawlands Town Centre

3.65. Footfall counts are important indicators of the vitality and viability of a town centre, as they can help point to those areas which are most visited and therefore point to relatively busy, and not so busy, parts of the town centre. They do not, however, indicate patterns of pedestrian flows within the town centre as origins and destinations were not surveyed. Patterns of pedestrian density, as measured in Shawlands, can reflect the mix and location of uses throughout the town centre, access points, pinch points, etc.

3.66 The Council began undertaking footfall counts in Shawlands Town Centre in October 2007, and the survey was repeated in 2008. The surveys were undertaken in the morning and the afternoon, which is appropriate as they perhaps reflect the trading hours of many shops and businesses in the town centre. It should be recognised, however, that counts undertaken at other times could reveal a different pattern of results. The methodology used in the 2007 and 2008 surveys was the same, and both it and the detailed tables of results are set out in Annex 2 of this report. It is important to note that as the time series of footfall counts expands its value will increase and the trends identified will become more robust.

3.67 The results of the footfall surveys are set out in Table 11.

Table 11: Daily Average Footfall Counts in Shawlands Town Centre, 2007-08

	Autumn 2007		**Autumn 2008**		**Change 2007-2008**	
	Hourly Count	**%**	**Hourly Count**	**%**	**Hourly Count**	**%**
Total	3466	100	3697	100	231	6.7

3.68 Overall, Table 11 indicates that the number of people at the count locations in 2008 was 231 persons (6.7%) greater than in 2007, and this increase in activity is encouraging.

3.69 As might be anticipated, the level of pedestrians was not evenly distributed throughout the town centre. It is clear from Table 12 that there were significantly more pedestrians on the western side of the town centre, than at the eastern side. The west side accounted for around 80% of pedestrians in both 2007 and 2008, and this high level might partly reflect the relative attractiveness of the operators in the Shawlands Arcade, and movements to and from the two car park access points within it. It could also reflect the mix of uses on the eastern side of

Kilmarnock Road, some of which tend to be associated with the evening economy rather than retailing and commercial.

Table 12: Daily Average Footfall Counts in Shawlands Town Centre, 2007-08, West and East						
	Autumn 2007		**Autumn 2008**		**Change 2007-2008**	
	Hourly Count	**%**	**Hourly Count**	**%**	**Hourly Count**	**%**
West	2780	80.3	2951	79.8	171	6.2
East	686	19.7	746	20.2	60	8.7
Total	3466	100	3697	100	231	6.7

3.70 As might be expected, as indicated in Table 13, there were fewer pedestrians at the northern and southern ends of the town centre, away from the focus of activity at the Shawlands Arcade area (Mid), although each of these locations accounted for around 20% of pedestrians in the town centre.

Table 13: Daily Average Footfall Counts in Shawlands Town Centre, 2007-08, North, Mid and South						
	Autumn 2007		**Autumn 2008**		**Change 2007-2008**	
	Hourly Count	**%**	**Hourly Count**	**%**	**Hourly Count**	**%**
North	772	22.3	788	21.3	16	2.1
Mid	2052	59.2	2205	59.6	153	7.5
South	642	18.5	704	19	62	9.7
Total	3466	100	3697	100	231	6.7

4.0 Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

4.1 From the outlets surveys, footfall surveys and the *'Shawlands Customer Survey 2009 Initial Findings'* (December 2009), the following strengths, weaknesses, opportunities and threats (SWOT) of Shawlands town centre have been identified.

<u>Strengths</u>

- there is a good range of comparison shopping generally, and also of national multiples and independent operators;
- the convenience shopping available in the town centre and the edge of centre food superstore at Riverford Road;
- evening economy is continuing to develop;
- strong community;
- good public transport links;
- high footfall at PRA;
- the number of vacancies is reducing, indicating continued investment in the centre.

<u>Weaknesses</u>

- perception of town centre having many vacant units;
- design and layout of the Shawlands Arcade which is essentially the town centre's Principal Retail Area;
- restricted pedestrian access to Shawlands Arcade via a ramp;
- lack of physical expansion opportunities;
- shoppers perception that shopfronts require improvement;
- lack of cinema, other commercial leisure, community and arts facilities;

- no clear anchor store;
- poor access to Queens Park;
- lack of public toilets;
- few use public transport to travel to the town centre, despite good public transport accessibility.

Opportunities

- qualitative uplift in comparison shopping provision in the PRA;
- small outlets which can attract niche, specialist, independent operators;
- development of an events area to encourage a ‘destination’ role;
- the possibility of improving links with Queens Park.

Threats

- concentration of vacancies in the Principal Retail Area;
- perception of anti-social behaviour associated with the centre’s strong evening economy;
- litter on the streets which detracts from its attractiveness;
- perceived high levels of traffic congestion and associated noise;
- poor quality of off street car parks;
- poor quality of pavement surfaces and public realm.

5.0 Conclusions

5.1 The Shawlands Arcade is effectively the centre’s Principal Retail Area (PRA), where retailing is focused. Although it has the largest shops (which are mostly comparison shopping orientated), has associated off-street car parking, is accessible by bus, and has the highest footfall levels, the Customer Survey reveals that shoppers feel it could be improved. There is, generally, also a concern with the quality of the town centre’s comparison shopping offer. In order to increase its attractiveness, and maximise its contribution to the town centre’s vitality and viability, there is therefore a need to improve the quality of the town centre’s comparison retail offer. These steps could perhaps be complimented by the town centre continuing to attract niche, and independent retailers, thereby potentially strengthening its unique identity.

5.2 Unlike other Tier 2 town centres, such as Pollok and Easterhouse, there are no identified development sites within the Shawlands town centre boundary, or at edge of centre sites, which would provide the opportunity to significantly expand the town centre’s floorspace and thereby increase the range and type of goods it can offer. Any improvements, therefore, appear most likely to emerge through redevelopment within the existing town centre boundary. Perhaps the clearest town centre opportunity would be the redevelopment of the Shawlands Arcade. The physical constraints and limitations of the town centre may therefore hinder it from significantly increasing its vitality and viability, and its competitiveness. Consequently, any short-term improvements to its retail offer are likely to be achieved by utilising the existing properties.

5.3 The convenience shops tend to be small in size and appear to offer a ‘top-up’ facility rather than a ‘main shop’ service. The large food superstore at the nearby, edge of town centre, Riverford Road and Titwood Road food superstores provide a main food function, however. Perhaps as a result of this the Customer Survey does not indicate any concern with the level or quality of convenience store provision in Shawlands. There may, therefore, be little significant need, or pressure from survey respondents, to significantly add to the current level or quality of convenience shopping provision.

5.4 Although the customer survey reveals a concern amongst shoppers at the level of vacant units in the centre, the outlets survey indicates the figure has fallen from 13% in 2002 to 10% in 2009. There is a high concentration of vacancies in the PRA, however, where City Plan 2 continues to direct Class 1 (Shops) uses rather than others such as Class 2 (Offices) and Class 3 (Food and Drink) uses. The proportion of units in the PRA which were vacant was consistently higher than in the secondary town centre between 2002 and 2009, however, perhaps giving these a greater visual impact than those elsewhere, and partly explaining the Customer Survey concern. In view of the above, the level of vacancies, particularly in the PRA, should be carefully monitored to allow the early identification of any significant change in the level and/or location of vacant units within the town centre.

5.5 The customer survey highlights priority issues which respondents consider would improve the town centre. These generally fall within two groups, namely improving amenity, and increasing vitality and viability.

> Improving amenity: These issues are safety and security (lighting TCRF), brightening the centre, and pedestrian movements across roads. The Council's proposed 'Shawlands Public Realm and Lighting' Town Centre Regeneration Fund bid of August 2009 sought to tackle some of these issues. The bid sought public realm improvements focused on resurfacing the footway along Kilmarnock Road/Pollokshaws Road, including replacing street furniture. In addition, significant new lighting to important buildings, up lighting of trees, and new street lighting was proposed. Tree management in Queens Park also sought to improve the amenity of the area which is close to the town centre, and which the Customer Survey suggests could be better linked to the town centre. Unfortunately the bid was not successful, but its elements remain valid in seeking to address some of the priority amenity issues raised in the Customer Survey. Perhaps other appropriate mechanisms to implement these improvements, either as a package or separately, could be investigated.
>
> Improving vitality and viability: The priorities highlighted in the Customer Survey are increasing evening economy activities, improving leisure facilities, and having regular events staged at a venue in the town centre. The Customer Survey also revealed, however, that some respondents feel there are too many public houses and restaurants in the town centre. These could give rise to amenity issues, particularly for those living in and around the town centre. Consequently, any significant increase in these types of uses should be carefully considered with regard to their possible impacts on residential amenity.
>
> Although the town centre offers shopping and other services, it lacks commercial leisure facilities. This is an issue highlighted by the Customer Survey, which notes the lack of a cinema, community or arts facilities in the town centre. These uses are complimentary to the retail and other services normally found in town centres and can offer the opportunity for linking shopping and leisure trips, in addition to increasing town centre vitality and viability into the evening. Such uses could therefore be welcomed within Shawlands town centre, subject to development plan policies.
>
> The possibility of providing an appropriately sized events venue within the town centre, or close to it, in order to stage regular events, could be explored. Such a venue could also contribute to improving the vitality and viability of the town centre, but again impact on residential amenity would be a key consideration in identifying a possible location.

5.6 The Customer Survey also generally links high levels of litter with those using hot food shops, which have doubled in number in recent years. This issue might be addressed through the Clean Glasgow Campaign which targets graffiti, litter - particularly take away cartons, cans, cigarette butts and chewing gum, fly-posting, fly-tipping and the illegal dumping of rubbish on city streets.

5.7 Further analysis of the Customer Survey 2009 has yet to be undertaken, and any additional issues revealed should be considered, perhaps through the direction of the Shawlands Town Centre Steering Group where appropriate, or through other Groups or organisations

ANNEX 1 Outlets Surveys, 2002, 2005, 2009

January 2002					
Town Centre					
Unit Size	**No.**	%		**Floorspace**	%
Under 100 sqm	174	66.4%		10,298	27.5%
100 sqm and over	88	33.6%		27,188	72.5%
	262			**37,486**	**100.0%**
Category	**No.**	%		**Floorspace**	%
Comparison	85	32%		13,309	36%
Convenience	25	10%		6,169	16%
Service	117	45%		14,394	38%
Vacant	35	13%		3,614	10%
	262			**37,486**	**100%**
Types	**No.**	%		**Floorspace**	%
Independent	102	38.9		7,763	20.7
National Multiples	42	16.0		13,240	35.3
Financial	13	5.0		2,787	7.4
Food Service	24	9.2		2,873	7.7
Office	21	8.0		2,084	5.6
Others	25	9.5		5,125	13.7
Vacant	35	13.4		3,614	9.6
	262	**100.0**		**37,486**	**100.0**
(Note: National Multiples includes charity shops)					
Convenience	**No.**	%		**Floorspace**	%
Under 2,300 sqm	25	100.0		6,169	100.0
2,300 sqm and over	0	0.0		0	0.0
	25	**100.0**		**6169**	**100.0**
Comparison	**No.**	%		**Floorspace**	%
Under 100 sqm	56	65.9		3,325	25.0
100 sqm and over	29	34.1		9,984	75.0
	85	**100.0**		**13,309**	**100.0**
Leisure & Entertainment	**No.**	%			
Cafe/Restaurant	21	60.0			
Public House	8	22.9			
Amusement Arcade	2	5.7			
Sauna/Sun Parlour	4	11.4			
	35	**100.0**			
Commercial	**No.**	%			
Banks/Building Societies	11	15.3			
Other Financial Services	25	34.7			
Estate Agents/Surveyors	8	11.1			
Hairdressers	20	27.8			
Travel Agents	5	6.9			
Hot Food Shops	3	4.2			
	72	**100.0**			

January 2002					
Principal Retail Area					
Unit Size	**No.**	%		**Floorspace**	%
Under 100	23	39.7%		1,615	10.3%
>100	35	60.3%		13,997	89.7%
	58	**100.0%**		**15,612**	**100.0%**
Category	**No.**	%		**Floorspace**	%
Comparison	25	43%		8,020	51%
Convenience	5	9%		2,878	18%
Service	13	22%		2,901	19%
Vacant	15	26%		1,813	12%
	58	**100%**		**15,612**	**100%**
Types	**No.**	%		**Floorspace**	%
Independent	14	24.1		1,718	11.0
National Multiples	20	34.5		9,597	61.5
Financial	4	6.9		911	5.8
Food Service	2	3.4		435	2.8
Office	1	1.7		458	2.9
Others	2	3.4		680	4.4
Vacant	15	25.9		1,813	11.6
	58	**100.0**		**15,612**	**100.0**
(Note: National Multiples includes charity shops, where appropriate)					
Convenience	**No.**	%		**Floorspace**	%
Under 2,300 sqm	5	100.0		2,878	100.0
2,300 sqm and over	0	0.0		0	0.0
	5	**100.0**		**2,878**	**100.0**
Comparison	**No.**	%		**Floorspace**	%
Under 100 sqm	10	40.0		800	10.0
100 sqm and over	15	60.0		7,220	90.0
	25	**100.0**		**8,020**	**100.0**
Leisure & Entertainment	**No.**	%			
Cafe/Restaurant	2	50.0			
Public House	1	25.0			
Amusement Arcade	1	25.0			
Sauna/Sun Parlour	0	0.0			
	4	**100.0**			
Commercial	**No.**	%			
Banks/Building Societies	2	25.0			
Other Financial Services	2	25.0			
Estate Agents/Surveyors	0	0.0			
Hairdressers	1	12.5			
Travel Agents	3	37.5			
Hot Food Shops	0	0.0			
	8	**100.0**			

July 2005					
Town Centre					
Unit Size	**No.**	%		**Floorspace**	%
Under 100	166	63.8%		9,916	26.2%
>100	94	36.2%		27,929	73.8%
	260			**37,844**	**100.0%**
Category	**No.**	%		**Floorspace**	%
Comparison	85	33%		13,766	36%
Convenience	28	11%		6,522	17%
Service	123	47%		14,818	39%
Vacant	24	9%		2,738	7%
	260			**37,844**	**100%**
Types	**No.**	%		**Floorspace**	%
Independent	101	38.8		7,303	19.3
National Multiples	42	16.2		14,929	39.4
Financial	11	4.2		2,870	7.6
Food Service	26	10.0		2,904	7.7
Office	24	9.2		2,526	6.7
Others	32	12.3		4,574	12.1
Vacant	24	9.2		2,738	7.2
	260	**100.0**		**37,844**	**100.0**
(Note: National Multiples includes charity shops)					
Convenience	**No.**	%		**Floorspace**	%
Under 2,300 sqm	28	100.0		6,523	100.0
2,300 sqm and over	0	0.0		0	0.0
	28	**100.0**		**6,523**	**100.0**
Comparison	**No.**	%		**Floorspace**	%
Under 100 sqm	54	63.5		3,343	24.3
100 sqm and over	31	36.5		10,423	75.7
	85	**100.0**		**13,766**	**100.0**
Leisure & Entertainment	**No.**	%			
Cafe/Restaurant	20	50.0			
Public House	15	37.5			
Amusement Arcade	2	5.0			
Sauna/Sun Parlour	3	7.5			
	40	**100.0**			
Commercial	**No.**	%			
Banks/Building Societies	10	14.1			
Other Financial Services	22	31.0			
Estate Agents/Surveyors	9	12.7			
Hairdressers	19	26.8			
Travel Agents	5	7.0			
Hot Food Shops	6	8.5			
	71	**100.0**			

July 2005					
Principal Retail Area					
Unit Size	**No.**	**%**		**Floorspace**	**%**
Under 100	18	34.6%		1,342	8.2%
>100	34	65.4%		15,056	91.8%
	52	**100.0%**		**16,398**	**100.0%**
Category	**No.**	**%**		**Floorspace**	**%**
Comparison	22	42%		8,167	50%
Convenience	5	10%		2,770	17%
Service	12	23%		3,144	19%
Vacant	13	25%		2,316	14%
	52	**100%**		**16,397**	**100%**
Types	**No.**	**%**		**Floorspace**	**%**
Independent	10	19.2		888	5.4
National Multiples	19	36.5		10,335	63.0
Financial	4	7.7		1,299	7.9
Food Service	2	3.8		108	0.7
Office	1	1.9		626	3.8
Others	3	5.8		826	5.0
Vacant	13	25.0		2,316	14.1
	52	**100.0**		**16,398**	**100.0**
(Note: National Multiples includes charity shops, where appropriate)					
Convenience	**No.**	**%**		**Floorspace**	**%**
Under 2,300 sqm	5	100.0		2,770	100.0
2,300 sqm and over	0	0.0		0	0.0
	5	**100.0**		**2,770**	**100.0**
Comparison	**No.**	**%**		**Floorspace**	**%**
Under 100 sqm	8	38.1		660	8.1
100 sqm and over	13	61.9		7,507	91.9
	21	**100.0**		**8,167**	**100.0**
Leisure & Entertainment	**No.**	**%**			
Cafe/Restaurant	2	40.0			
Public House	2	40.0			
Amusement Arcade	1	20.0			
Sauna/Sun Parlour	0	0.0			
	5	**100.0**			
Commercial	**No.**	**%**			
Banks/Building Societies	4	57.1			
Other Financial Services	0	0.0			
Estate Agents/Surveyors	0	0.0			
Hairdressers	0	0.0			
Travel Agents	3	42.9			
Hot Food Shops	0	0.0			
	7	**100.0**			

December 2009				
Town Centre				
Unit Size	**No.**	%	**Floorspace**	%
Under 100	165	63.0%	9,833	25.7%
>100	97	37.0%	28,367	74.3%
	262	**100.0%**	**38,200**	**100.0%**
Category	**No.**	%	**Floorspace**	%
Comparison	75	28.6%	12,924	33.8%
Convenience	29	11.1%	6,363	16.7%
Service	133	50.8%	15,621	40.9%
Vacant	25	9.5%	3,292	8.6%
	262	**100.0%**	**38,200**	**100.0%**
Types	**No.**	%	**Floorspace**	%
Independent	97	37.0%	10,006	26.2%
National Multiples	35	13.4%	10,790	28.2%
Financial	14	5.3%	2,556	6.7%
Food Service	30	11.5%	3,470	9.1%
Office	28	10.7%	3,105	8.1%
Others	33	12.6%	4,981	13.0%
Vacant	25	9.5%	3,291	8.6%
	262	**100.0%**	**38,199**	**100.0%**
(Note: National Multiples includes charity shops)				
Convenience	**No.**	%	**Floorspace**	%
Under 2,300 sqm	29	96.6%	6,364	16.7%
2,300 sqm and over	0	3.4%	0	16.7%
	29	**100.0%**	**6,364**	**33.3%**
Comparison	**No.**	%	**Floorspace**	%
Under 100 sqm	49	65.3%	3,174	8.3%
100 sqm and over	26	34.7%	9,750	25.5%
	75	**100.0%**	**12,924**	**33.8%**
Leisure & Entertainment	**No.**	%		
Cafe/Restaurant	22	57.9%		
Public House	14	36.8%		
Amusement Arcade	1	2.6%		
Sauna/Sun Parlour	1	2.6%		
	38	**100.0%**		
Commercial	**No.**	%		
Banks/Building Societies	10	12.3%		
Other Financial Services	24	29.6%		
Estate Agents/Surveyors	15	18.5%		
Hairdressers	22	27.2%		
Travel Agents	2	2.5%		
Hot Food Shops	8	9.9%		
	81	**100.0%**		

December 2009				
Principal Retail Area				
Unit Size	**No.**	%	**Floorspace**	%
Under 100	18	34.0%	1342	8.2%
>100	35	66.0%	15056	91.8%
	53	**100.0%**	**16398**	**100.0%**
Category	**No.**	%	**Floorspace**	%
Comparison	24	45.3%	8484	51.8%
Convenience	5	9.4%	2813	17.2%
Service	14	26.4%	3343	20.4%
Vacant	10	18.9%	1753	10.7%
	53	**100.0%**	**16393**	**100.0%**
Types	**No.**	%	**Floorspace**	%
Independent	14	26.4%	4,168	25.4%
National Multiples	17	32.1%	7,296	44.5%
Financial	5	9.4%	1,290	7.9%
Food Service	3	5.7%	477	2.9%
Office	2	3.8%	717	4.4%
Others	2	3.8%	697	4.3%
Vacant	10	18.9%	1,754	10.7%
	53	**100.0%**	**16,399**	**100.0%**
(Note: National Multiples includes charity shops, where appropriate)				
Convenience	**No.**	%	**Floorspace**	%
Under 2,300 sqm	5	100.0%	2,813	100.0%
2,300 sqm and over	0	0.0%	0	0.0%
	5	**100.0%**	**2,813**	**100.0%**
Comparison	**No.**	%	**Floorspace**	%
Under 100 sqm	8	33.3%	674	7.9%
100 sqm and over	16	66.7%	7812	92.1%
	24	**100.0%**	**8486**	**100.0%**
Leisure & Entertainment	**No.**	%		
Cafe/Restaurant	2	50.0%		
Public House	2	50.0%		
Amusement Arcade	0	0.0%		
Sauna/Sun Parlour	0	0.0%		
	4	**100.0%**		
Commercial	**No.**	%		
Banks/Building Societies	5	50.0%		
Other Financial Services	2	20.0%		
Estate Agents/Surveyors	0	0.0%		
Hairdressers	0	0.0%		
Travel Agents	2	20.0%		
Hot Food Shops	1	10.0%		
	10	**100.0%**		

ANNEX 2 Footfall Survey Count Methodology and Tables of Footfall Counts

Three counts were performed on separate weekdays, two times a day in eight separate locations, for ten minutes in duration. The locations were a combination of gateways to and from the town centre and sites at the heart of the town centre. Care was taken to ensure that the study did not clash with any events that would impact on regular footfall, for example public or school holidays.

For these counts, observers were dispersed to eight locations throughout the town centre. Using hand-held counters, the number of people passing by each location was recorded for 10-minute intervals for two distinct periods of the day (morning and afternoon). This data was compiled with the counts from the separate periods being added together, arriving at an hourly pedestrian count for each location, which is then averaged.

Table A2a: Daily Average Footfall in Shawlands Town Centre, 2007-08

	Autumn 2007		**Autumn 2008**		**Change 2007-2008**	
	Hourly Count	**%**	**Hourly Count**	**%**	**Hourly Count**	**%**
Pollokshaws Road/Minard Road	473	13.7	513	13.9	40	8.5
Pollokshaws Rd/Langside Avenue	299	8.6	275	7.4	-24	-8.0
Shawlands Arcade (main entrance)	1134	32.7	1280	34.6	146	12.9
Shawlands Arcade (north car park entrance)	443	12.8	413	11.2	-30	-6.8
Shawlands Arcade (south car park entrance)	273	7.9	279	7.5	6	2.2
Kilmarnock Rd (opposite Shawlands Arcade entrance)	202	5.8	233	6.3	31	15.3
Kilmarnock Rd/Regwood St	185	5.3	238	6.4	53	28.6
Kilmarnock Road/Coustonholm Rd (north)	457	13.2	466	12.6	9	2.0
Total	3466	100	3697	100	231	6.7

Table A2b: Daily Average Footfall in Shawlands Town Centre, 2007-08 - West						
	Autumn 2007		**Autumn 2008**		**Change 2007-2008**	
	Hourly Count	**% of Town Centre Total**	**Hourly Count**	**% of Town Centre Total**	**Hourly Count**	**% of Town Centre Total**
Pollokshaws Road/Minard Road	473	13.7	513	13.9	40	8.5
Shawlands Arcade (main entrance)	1134	32.7	1280	34.6	146	12.9
Shawlands Arcade (north car park entrance)	443	12.8	413	11.2	-30	-6.8
Shawlands Arcade (south car park entrance)	273	7.9	279	7.5	6	2.2
Kilmarnock Road/Coustonholm Rd (north)	457	13.2	466	12.6	9	2.0
Total - West	2780	80.3	2951	79.8	171	6.2
Total - Town Centre (see Table A2a)	3466	100	3697	100	231	6.7

Table A2c: Daily Average Footfall in Shawlands Town Centre, 2007-08, East						
	Autumn 2007		**Autumn 2008**		**Change 2007-2008**	
	Hourly Count	**% of Town Centre Total**	**Hourly Count**	**% of Town Centre Total**	**Hourly Count**	**% of Town Centre Total**
Pollokshaws Rd/Langside Avenue	299	8.6	275	7.4	-24	-8.0
Kilmarnock Rd (opposite Shawlands Arcade entrance)	202	5.8	233	6.3	31	15.3
Kilmarnock Rd/Regwood St	185	5.3	238	6.4	53	28.6
Total - East	686	19.7	746	20.2	60	8.7
Total - Town Centre (see Table A2a)	3466	100	3697	100	231	6.7

Table A2d: Daily Average Footfall in Shawlands Town Centre, 2007-08, North						
	Autumn 2007		**Autumn 2008**		**Change 2007-2008**	
	Hourly Count	**% of Town Centre Total**	**Hourly Count**	**% of Town Centre Total**	**Hourly Count**	**% of Town Centre Total**
Pollokshaws Road/Minard Road	473	13.7	513	13.9	40	8.5
Pollokshaws Rd/Langside Avenue	299	8.6	275	7.4	-24	-8.0
Total - North	772	22.3	788	21.3	16	2.1
Total - Town Centre (see Table A2a)	3466	100	3697	100	231	6.7

Table A2e: Daily Average Footfall in Shawlands Town Centre, 2007-08, Mid						
	Autumn 2007		**Autumn 2008**		**Change 2007-2008**	
	Hourly Count	**% of Town Centre Total**	**Hourly Count**	**% of Town Centre Total**	**Hourly Count**	**% of Town Centre Total**
Shawlands Arcade (main entrance)	1134	32.7	1280	34.6	146	12.9
Shawlands Arcade (north car park entrance)	443	12.8	413	11.2	-30	-6.8
Shawlands Arcade (south car park entrance)	273	7.9	279	7.5	6	2.2
Kilmarnock Rd (opposite Shawlands Arcade entrance)	202	5.8	233	6.3	31	15.3
Total - Mid	2052	59.2	2205	59.6	153	7.5
Total - Town Centre (see Table A2a)	3466	100	3697	100	231	6.7

Table A2f: Daily Average Footfall in Shawlands Town Centre, 2007-08, South						
	Autumn 2007		**Autumn 2008**		**Change 2007-2008**	
	Hourly Count	**% of Town Centre Total**	**Hourly Count**	**% of Town Centre Total**	**Hourly Count**	**% of Town Centre Total**
Kilmarnock Rd/Regwood St	185	5.3	238	6.4	53	28.6
Kilmarnock Road/Coustonholm Rd (north)	457	13.2	466	12.6	9	2.0
Total - South	642	18.5	704	19	62	9.7
Total - Town Centre (see Table A2a)	3466	100	3697	100	231	6.7