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# Planning Report

Retail Study Update

Helensburgh Town Centre
& Redevelopment of Waterfront Site

Argyll & Bute Council

**January 2024**

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# Executive Summary

This Retail Study is an update of the previous Retail Studies for Helensburgh undertaken in 2007 and 2011. The Study follows the same format as the two past studies and provides an assessment of Helensburgh as a retailing centre together with an update on capacity for further retail development in the medium to longer term. It also provides an overview on current retail market conditions and potential retailer/occupier requirements.

As a town centre site, in accordance with current and proposed Local Development Plans and approved Masterplan, the site does not require a retail impact assessment. However, to address any community concerns regarding retail capacity and qualitative impact, the following study was instructed which accords with the previous retail capacity studies which related to the potential retail capacity for the Helensburgh catchment area. The council has outlined the wider development strategy for the waterfront site with the initial £22m phase of leisure development, car parking and amenity space completed. It is envisaged that the development of the commercial area will compliment this with the retail element a critical component of promoting the long term vitality and viability of the town centre. Combined with the completed leisure centre the fully developed site will have an additional gravitational effect reclaiming expenditure currently leaking from the town and providing a destination for locals and visitors to enjoy.

A retail audit of Helensburgh town centre was benchmarked against the Experian Goad UK averages for all town centres and shopping locations within the UK (circa 2000 centres). The audit confirmed that the level of convenience and comparison units (in percentage terms) within Helensburgh town centre is in line with national averages for retailer representation. It also highlighted that the number of vacant units within the town centre is actually below the national average vacancy rate. In appreciation of certain Key Performance Indicators (KPI's) such as diversity of uses, type of retailer representation (in terms of number of convenience and comparison units), vacancy rates and town centre functions, it is considered that Helensburgh town centre is relatively healthy. However, notwithstanding these KPI's, it is still considered that the town centre could improve its range and choice of retailer representation beyond which it currently offers.

The Waterfront site presents a significant opportunity that provides the size of site required for new retail development. The redevelopment of this site for both leisure and retail uses will improve the overall attractiveness of the town centre and also retain shoppers within the town. The modern retail and leisure facilities will also potentially attract more visitors and shoppers from outside the area to Helensburgh. Such town centre focused development will fully accord with the new requirements of National Planning Policy 4 (February 2023) and the Proposed Argyll and Bute Local Development Plan 2 (which is anticipated to be adopted February 2024). There are very limited development opportunity sites within Helensburgh's historic town centre that offer the size required for new retailing formats and the waterfront site, being part of a masterplanned approach to promote the long term health of the town centre offers an appropriate and planned site for such much needed retail investment in the town centre.

In terms of retail capacity this Retail Study has assumed that the shopping patterns relating to comparison (non-food shopping) in the area have remained consistent to those of 2007 /2011 as there have been no major changes in comparison shopping within the area. With regards to convenience (food) shopping, the main change in retail provision is the opening of the (out of centre) Morrisons foodstore (formally Waitrose) in 2020**.** This foodstore has significantly improved the convenience shopping facilities from those assessed in 2007 and 2011. However, while Helensburgh food shopping provision has improved, so too has the food retailing offer in surrounding towns, this results in a high proportion of expenditure leakage outside Helensburgh.

This Retail Study has assumed two scenarios (mirroring the two previous Retail Studies). Scenario 1 assumes that Helensburgh town centre retains its current retail market share. Scenario 2 assumes Helensburgh claws back a proportion of the expenditure leakage from competing towns. **In terms of Scenario 2 it is assumed that for comparison (non-food) goods Helensburgh could improve its market share of expenditure within the survey area which would justify additional comparison (non-food) floorspace of circa 3,000sqm to 5,000sqm gross over the next 5 to 10 years. In terms of convenience (food) goods it is considered there is also opportunity to further improve Helensburgh's market share to justify the provision of an additional convenience (food) floorspace of circa 2,000 – 2,500sqm gross floorspace over the next 5 to 10-year period.**

The additional retail floorspace identified by the Retail Study meets the current store requirements of a number of comparison (non-food) and convenience (food) retailers who are known to be looking for new development opportunities and may consider future retail floorspace in Helensburgh. For example (but not excluded to) Home Bargains, B&M, Aldi, Lidl, Poundland, M&S Simply Food, Sainsburys (convenience store format) and Asda (new convenience store format). An improved retail offer within Helensburgh town centre would reduce the need for shoppers to travel to other centres outwith the Council area.

The development of the Helensburgh Waterfront site will:

- assist in ensuring the town becomes as self-sufficient as possible for retail provision,
- reclaim leaked comparison and convenience retail expenditure,
- complement the existing retail offer in Helensburgh town centre through increased footfall,
- support the wider range of existing services within the town centre.
- promote a mixed use redevelopment of the waterfront site to increase shared trips for shopping and leisure anchoring further the waterfront site into the shopping and leisure fabric of the town centre to safeguard its current and future role as an important shopping and service centre.
- support Helensburgh as a public Transport Hub for rail and bus, developing the waterfront site provides the required retail floorspace in an accessible location well served by public transport to not only promote sustainable development, but also ensure access is available to members of the community who do not own a car.

# 1. Introduction

## 1.1 Background to Report

1.1.1 In June 2023 Argyll and Bute Council instructed Colliers to update their previous Retail Study, undertaken in 2011. As detailed by Council Officers, the updated retail study has been requested to support to the redevelopment of the Helensburgh Waterfront Development site. As a town centre site there isn't a requirement to undertake a retail impact assessment however this qualitative study was undertaken to address any community concerns regarding retail capacity and impact. The study considers whether there is sufficient retail demand to support the future provision of additional retail floorspace (both convenience and comparison) in Helensburgh town centre. It seeks to review whether new retail development will cause a negative impact on the existing town centre or potentially enhance the town centre through the potential claw back of retail expenditure, currently lost to other centres outwith Helensburgh.

## 1.2 Helensburgh Retail Studies 2007 & 2011

1.2.1 In summary, in 2007 Colliers International undertook a retail study of Helensburgh for the Helensburgh Partnership. The Study examined the retail make-up and retail market of Helensburgh town centre; it also undertook a retail capacity assessment to identify any spare capacity for the provision of additional comparison and convenience floorspace with the town centre. The capacity assessment was based on a Household Survey that questioned the shopping behaviour of residents within Helensburgh and surrounding areas and confirmed, at that time, that a significant amount of expenditure was spent outside Helensburgh Town Centre at other retail destinations such as Dumbarton, Clydebank and Glasgow. The retail study concluded that there was justification for the provision of a 5,600sqm of new comparison floorspace within the town centre together with provision of 1,500sqm of additional convenience floorspace.

1.2.2 In 2011, Argyll and Bute Council requested that Colliers update the preceding Retail Study. That Study was based on the results of the 2007 Household Survey and provided a 2011 retail audit of Helensburgh Town Centre and the wider area. The Update also reviewed the retail capacity assessment and provided a revised retail market assessment. The 2011 Retail Study concluded that if the existing shopping patterns were maintained (e.g., the high level of expenditure continued to be spent outside Helensburgh), there would be an oversupply of comparison floorspace in 2026 (circa 129sqm). Equally, the 2011 Update concluded, that if the shopping patterns were maintained, in terms of convenience floorspace, there was little scope to justify additional floorspace provision. However, the 2011 Retail Update also confirmed that if Helensburgh improved its market share and clawed back significant leakage of expenditure there would be a requirement for additional comparison retail floorspace in 2021 and 2026 (of approximately 5,732sqm and 6382sqm net floorspace respectively). The Retail Update also concluded that there was an opportunity to improve the market share for

convenience retailing within Helensburgh and retain a significant amount of expenditure, to justify the provision of additional convenience floorspace of 2,150sqm net floorspace in 2016, 3,426sqm net floorspace in 2021 and 2,107sqm in 2026.

1.2.3 Following the conclusions and recommendations of the 2011 Retail Update, planning permission for a supermarket at Cardross Road, Helensburgh, was granted by Argyll & Bute Council in 2012. The store commenced trading in October 2013 and originally traded as a Waitrose. In March 2020, Waitrose closed the supermarket. However, in December 2020 the unit was re-opened, trading as a Morrisons supermarket and continues to trade in this format to date.

## 1.3 Helensburgh Waterfront

1.3.1 The development of the Helensburgh Waterfront Site is a long-term key project for Argyll and Bute Council and has involved the relocation and redevelopment of the Leisure Centre and car park opening in September 2022. Following the construction of the Leisure Centre and car park, the redevelopment of the former swimming pool is now the main focus for this town centre site. While it is understood the remaining vacant site is proposed primarily for commercial development, due to interest by Helensburgh Community Council and the local community, a two-stage marketing process has been undertaken by Argyll and Bute Council to ascertain the various commercial and no-commercial interests in the vacant site.

## 1.4 Planning Policy Framework

1.4.1 In order to provide some context for this updated Retail Study, it is considered prudent to provide a summary review of the relevant policies and provisions of the Development Plan, comprising National Planning Framework 4 and the Argyll and Bute Local Development Plan.

1.4.2 National Planning Framework 4 (NPF4) is a long-term plan looking to 2045 that guides spatial development, sets out national planning policies, designates national developments and highlights regional spatial priorities. It is part of the development plan, and so influences planning decisions across Scotland. The Scottish Ministers adopted and published NPF4 on the 13 February 2023. It now forms part of the development plan along with the adopted Local Development Plan for the relevant council areas in Scotland.

1.4.3 NPF Policy 27 aims to encourages, promote and facilitate development in town centres and confirms this will be achieved through the application of the Town Centre First Approach. It advises that LDPs should support sustainable futures for city, town and local centres, in particular opportunities to enhance city and town centres. The Policy confirms that development proposals which improve and enhance the vitality and viability of a centre (including increasing the mix of uses) will be supported.

1.4.4 Following on from the above, Policy 28 of NPF4 encourages and promotes retail investment to the "most sustainable locations that are the most accessible" by a range of modes of transport. It advises through these intentions retail development and the location of shops

will support vibrant city, town and local centres. As a consequence, the NPF requires Local Development Plans to consider where there may be need for further retail provisions either through a retail study which identifies retail deficiency in the area's retail quality and quantity provision, or the general need for local communities to support local living.

1.4.5 Policy 28 specifically advises that development proposals for retail (including expansions and changes of use) should be consistent with the "Town Centre First Principle", which means that new retail proposals will be supported in (i) existing city, town and local centres or (ii) edge-of-centre areas if they are allocated as sites suitable for new retail development in the LDP. The Policy confirms that it the majority of cases new retail development proposals will not be supported in out of centre locations. Policy 28 further confirms that development proposals for retail that are consistent with the sequential approach will be supported, subject to the development being (i) of an appropriate scale for the location, (ii) will not adversely impact the character and amenity of the area, and (iii) is situated to benefit from high footfall and activity.

1.4.6 In terms of the Local Development Plan (LDP), the 2015 Argyll and Bute Council Local Development Plan is the adopted LDP. However, the LDP2 is at an advanced stage and due to be adopted in February 2024. Therefore, the policies and provisions of LDP 2 is considered to provide the most up-to-date planning policy position for Argyll and Bute Council.

1.4.7 In terms of retailing, LDP2 confirms that Argyll and Bute Council are keen to ensure the town centres continue to provide a shopping focus for the communities they serve. The LDP also recognises that retail and associated town centre services make an important contribution to the local economy and play an important role in sustaining the vitality and viability of both the town centres and the communities they serve.

1.4.8 Policy 45: Supporting our Town Centres and Retailing, confirms the Council will support development proposals that seek to maintain and enhance the vitality and viability of the established town centres in Argyll and Bute, through the provision of retail, commercial and other developments. The Policy further confirms town centres as the preferred location for new retail and commercial development.

1.4.9 Policy 46: Retail Development – The Sequential Approach, confirms a presumption in favour of retail development that accords with the sequential approach, with the preferred location being within a defined town centre.

1.4.10 Figure 1 below confirms the boundaries of Helensburgh Town Centre, as identified by LDP2. The Waterfront site is located within the define town centre (the area shaded orange).

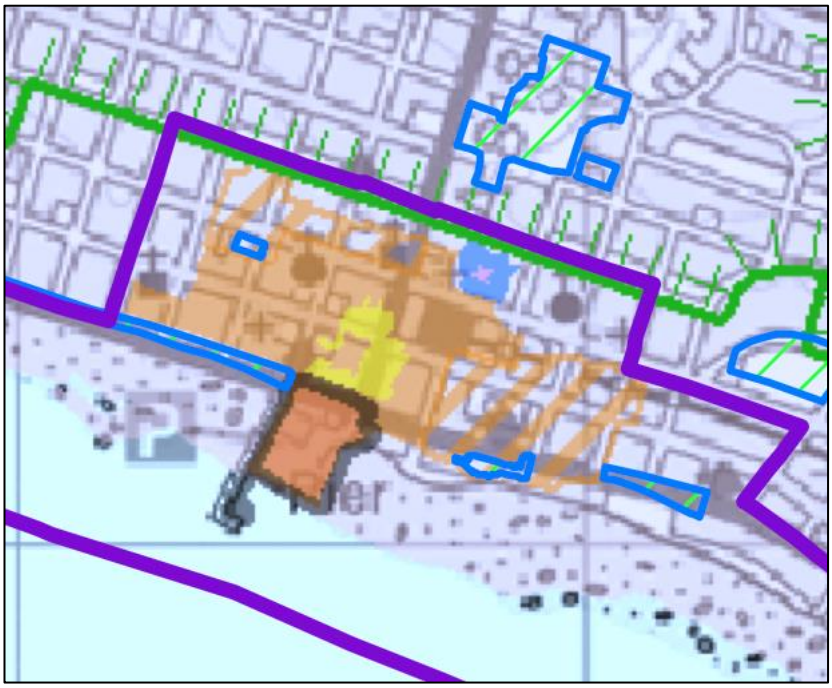


Figure1 - Extract of LDP2 Proposals Map for Helensburgh Town Centre

1.4.11 Part 10 of LDP2 identifies 'Areas for Action' which are effective land allocated for new development. Site reference A2006 allocates Helensburgh Town Centre and Waterfront as a "Strategic, regeneration and enhancement" opportunity. Additionally, Schedule 10 also allocates Helensburgh Pierhead for new community facilities, with site reference C2001 stating the uses to be "Swimming pool, community leisure facility, open space, town centre parking with up to 2,700m$^2$ retail use."

## 1.5 Retail Study Update 2023

1.5.1 In line with the requirements of NPF4, and the promotion of the Helensburgh Waterfront site, Argyll and Bute Council have instructed the production of an updated retail study.

1.5.2 Furthermore, since the 2011 Retail Study Update, a number of food and non-food retail developments have been built within Helensburgh and the surrounding area, which will have impacted shopping patterns over the last 10+ years. Mostly notably these include (i) the provision of a large supermarket on Cardross road, Helensburgh, which opened in 2013 and since 2020 has been trading as a Morrison foodstore; (ii) the mixed retail park, St James Retail Park, in Dumbarton comprises a different range of comparison and convenience national retailers since 2011, with the retail park now being anchored by Marks and Spencer Simply Foods, Asda, B&M, Halfords; (iii) a Lidl supermarket which opened in Dumbarton in February 2020, and (iv) Aldi has operated a supermarket in Alexandria since 2018 with consent also approved for Lidl recently too in the town.

1.5.3 The methodology of this 2023 update report is based upon the same Helensburgh catchment area. It uses national retailing information, together with updated population and retail expenditure information generated specifically for the Helensburgh catchment area.

1.5.4 This 2023 Retail Study Update provides the following:

- Retail Capacity Assessments for the base year 2023 and forecasts for a 5- and 10-year period e.g., 2023 – 2028 and 2023 – 2033 for both comparison and convenience expenditure.
- All values set at consistent 2021 price base.
- Project populations for 2023, 2028 and 2033, which have been derived from the well accepted source, Experian Retail Planner data for the specific catchment/study area.
- Retail Expenditure estimates for the base year 2023 and for the design years 2028 and 2033. The expenditure data have been gained from Experian and specifically generated Helensburgh catchment area. Expenditure growth rates have been gained from the most up-to-date source Experian Retail Planner Briefing Note 20 (RPBN20) dated February 2023.
- Updated retail floorspace data for Helensburgh town centre from Experian Goad for the base year 2023.
- The most recent retail sales densities, provided by the Experian RPBN20 for the calculation of the town centre turnover and the assessment of future retail floorspace.

1.5.5 A combination of sources has been used to assess the catchments likely shopping behaviour and associated expenditure flows. The sources include, but are not limited to, the 2007 Household Survey, an Experian Location Analyst Grocery Report, 2023 specialist retail reports, together with Colliers market knowledge and experience of retail markets.

# 2. Retail Audit & Market Assessment

## 2.1 Retail Audit

2.1.1 The retail audit was undertaken in September 2023 and comprised an on-site survey based on the most up-to-date GOAD Category Report for Helensburgh. Consistent with the previous two Retail Studies the audit provided an assessment of ground floor properties only. The use of the GOAD Report allows a comparison with the UK average in terms of overall representation of the main town centre uses e.g., comparison and convenience retailing, service and leisure uses and vacant premises.

2.1.2 The occupants of the town centre premises have been categorised into five(?) categories, which are as follows:

- Comparison Good retailing
- Convenience goods retailing
- Service uses, comprising retail services e.g., hairdressers, beauticians, financial services e.g., banks, and business services e.g., accountants, offices etc.
- Leisure uses.
- Vacant premises.

2.1.3 Each of these categories have been defined in the 2007 and 2011 Retail Studies.

2.1.4 While the boundary of the Experian GOAD Plan for Helensburgh does not exactly replicate the Town Centre boundary for Helensburgh as defined by the adopted Local Development Plan (as it includes a small number of additional units situated on surrounding roads) it does provide a general view of the way the Helensburgh town centre compares with the national averages of a range of planning uses within town centres. Figure 2 below confirms the 'make up' of Helensburgh town centre against the national average.

| | Helensburgh Town Centre | | National Average | Index |
|---|---|---|---|---|
| | No of Units | % | % | |
| Convenience | 21 | 9.55 | 9.28 | 103 |
| Comparison | 62 | 28.18 | 26.79 | 105 |
| Finance & Business Service | 25 | 11.36 | 8.63 | 132 |
| Retail Service | 44 | 20.00 | 15.76 | 127 |
| Leisure | 47 | 21.36 | 25.47 | 84 |
| Vacant | 21 | 9.55 | 13.87 | 69 |

*Figure 2 – Current mix of services in Helensburgh town centre (as at August 2023)*
*Source Experian GOAD Category Report for Helensburgh 2023.*

2.1.5 Generally, the Experian GOAD Category Report illustrates that Helensburgh town centre is relatively healthy compared to the national average;

- There is a higher than average representation of convenience and comparison retailers;
- A stronger than average representation of financial, business and retail type services.
- The Town Centre records below average for the number of vacant units.

The latter is especially interesting given the current economic circumstances and overall state of the retail sector at a national level.

## 2.2 Presence of Multiple Retailers

2.2.1 Both the 2007 Retail Study and 2011 Retail Update detailed the range of multiple retailers present in Helensburgh town centre. This Retail Study updates the list of multiple retailers located in the town centre as of August 2023 (Figure 3).

| | | | |
|---|---|---|---|
| Allen & Harris | Betfred | Boots (chemist, hearing & opticians) | Wilkies |
| GSPC | Costa | Rowlands Pharmacy | The Toy Shop |
| Countrywide | RS Mcoll | DEBRA | Superdrug |
| Clyde Property | Co-op | Oxfam | Semi-Chem |
| Royal Bank of Scotland | Tesco | Shelter | Card Factory |
| Lloyds Bank (Bank of Scotland) | Timpsons | Thorntons | Paper Kisses |
| Yorkshire Building Society | Subway | British Heart Foundation | WH Smith |
| Ladbrokes | Greggs | Specsavers (opticians and hearing) | Farmfoods |
| Wrights Home Hardware | | | |

*Figure 3 – List of Multiples within Helensburgh Town Centre 2023.*

2.2.2 Experian GOAD define Multiple Retailers as those being an occupier of 10 or more outlets throughout the UK. The number of multiple retailers currently located in Helensburgh town centre total approximately 35, which is a fall from 47 in 2011.

2.2.3 Due to current economic circumstances a number of the multiple retailers usually located within town centres have gone into receivership and are no longer operating. Helensburgh town centre has been subject to such circumstances, loosing around 14 multiple retailers since the 2011 Retail Update was undertaken. Such retailers include Bookworks, Clarks, Happit, Johnsons, M&Co, Edinburgh Woollen Mill and the Aga Shop. A number of these retailers have gone into administration and therefore all stores throughout the UK have been closed, however a number of the lost multiples are still operating on a national basis in other town centres e.g., Clarks and Santander. Notably, the change in multiple retailer representation within the town centre has been predominantly within the comparison (non-food) goods

sector, with little movement in the presence of the food retailers that are in the centre; notwithstanding the relocation of Farmfoods to a larger unit on East Clyde Street.

2.2.4 While there has been an overall loss of multiple retailers within the town centre, there has been a number of new multiple occupants, which include Home Hardware (trading as Wrights), Paper Kisses and the Card Factory.

## 2.3 Market Assessment

2.3.1 The retail landscape has changed considerably during the last decade due to shifting consumer habits driven by the rise of internet shopping and accelerated more recently by the global pandemic. Consequently, demand for retailers to acquire space in smaller towns such as Helensburgh has been weakened considerably, with demand being very much focussed on the major retail hubs of Glasgow and Edinburgh.

2.3.2 However, assuming the correct floorplates can be created, there will be a degree of demand, most notably from the discount and foodstore sectors, who require modern purpose built units which are generally of a smaller scale than superstores and therefore potentially easily integrated into the Waterfront site.

2.3.3 Accordingly, in conjunction with our retail agency team we have identified the following retailers, who, with the appropriate space being provided at the right size and in the right location, may be interested in occupying retail space in Helensburgh. The list below is a non-exhaustive list of possible comparison and convenience retailers, along with their current space requirements, who may consider Helensburgh as a future trading location:

**Occupiers**

- Home Bargains (2,323 – 3,717sqm)
- B&M (929 – 2,788sqm)
- The Original Factory Shop (464 – 737sqm)
- Aldi (1,672 – 1,858sqm)
- Lidl (1,672 – 2,323sqm)
- Farmfoods (1,394 sqm)
- Poundland (1,115 – 1,394sqm)
- Poundstretcher (557 – 2,788 sqm)
- M&S Simply Food (929sqm)
- Food Warehouse (929sqm)
- Sainsburys (1,858sqm)
- Asda (1,115 – 5,576sqm)

2.3.4 It is also worth noting that the bigger supermarket (foodstore) operators listed above are now promoting new smaller convenience formats for town centre locations. Whilst the Co-Op have an existing presence in Helensburgh Town Centre, from a market view point it is believed there is capacity for an additional operator. The newer convenience store format operators are listed below.

**Smaller Format Convenience Operators**

- Asda (325 – 464 sqm)
- Sainsburys (232 – 836 sqm)

**Drive Thru Requirements**

- Costa (167 sqm)
- Starbucks (167 sqm)

2.3.5 The Waterfront site is the most obvious town centre opportunity for new retail development in Helensburgh. The currently vacant site could provide an opportunity for a mixed convenience and comparison development. This could assist in providing opportunities for the retailers identified above who cannot currently locate in the town, as the provision of their required size of retail unit is not presently available. There have not been any specific discussions with individual retailers about the possibility of locating in Helensburgh (as Argyll and Bute Council are undertaking their own exercise in this regard); however, from discussions with Colliers retail agents, it would appear that modern retailers prefer to locate in a retail scheme with an anchor tenant, in retail units which meet their trading and servicing requirements. A successful scheme will provide a mixture of retail unit sizes which provide the opportunity for mezzanine provision, with good visibility, access and car parking.

2.3.6 Since the last Retail Study was undertaken in 2011, it is acknowledged that Morrisons have entered Helensburgh, having acquired the former Waitrose store. However, it is considered there will be demand from other food retailers for either discount or small format convenience stores.

2.3.7 In terms of assisting in reducing the leakage of trade to Dumbarton and other surrounding towns, it is recommended that any new floorspace needs to be able to compete with the offer in Dumbarton. The individual store requirements of the interested convenience operators vary across the sector.

# 3. Retail Need - Data Sources and Assumption

## 3.1 Objective

3.1.1 The main focus of this Retail Study is Helensburgh town centre, with the main objectives being:

- Whether there is sufficient retail capacity to allow additional retail floorspace on the Helensburgh Waterfront site;
- Would the redevelopment of the Waterfront site clawback expenditure that is being spent outside Helensburgh, and
- Would there be any impact on the existing retailers with Helensburgh Town centre because of additional retail floorspace on the Waterfront site.

3.1.2 Following on from the above objectives, while the assessment of retail floorspace need is necessarily detailed and relatively complex, this Retail Study tries to achieve transparency in all the calculations. As with the previous Retail Studies, this retail assessment follows a traditional approach to estimating retail floorspace need and have incorporated the latest published data which has been obtained from well accepted sources.

## 3.2 Methodology of Retail Need

3.2.1 As stated in the previous Retail Studies, the need for additional retail floorspace within a centre (or area) is dependent on the future relationship between the demand for and supply of space, ideally after considering the extent (if any) of any over/under trading that is occurring at the base year. The demand for floorspace is then determined by assessing the likely growth in the volume of consumer retail expenditure, while an assessment of floorspace supply involves quantifying the extent to which proposed changes in the location, quality and quantity of retail floorspace will meet the forecast increases in expenditure. Any monetary shortfall of supply relative to demand in the future indicates there is the need for more retail floorspace in quantitative terms. The scale of additional retail provision is then determined by converting any excess of consumer expenditure (or headroom expenditure) into a retail floorspace need by applying appropriate sales densities.

- *Step 1: Catchment Area Definition -* The catchment area should be defined with regard to the study objective. For this study the catchment of the previous retail studies has been maintained to allow comparison. The catchment area covers Helensburgh and its shopping hinterland. Appendix 1 confirms the catchment area, which replicates the past 2007 and 2011 Helensburgh Retail Study's.

- *Step 2: Analyse Consumer Demand -* This involves multiplying population by consumer retail expenditure per head for the base and design years. This should include resident population, but also, where it is likely to occur, any in-flow retail expenditure from residents, tourists and workers living outside the survey area.

- *Step 3: Analyse Retail Supply -* This step comprises an assessment of the turnover of the retail floorspace stock at the base year, both in terms of estimating the actual retail turnover of centres and stores, and a benchmark turnover.

- *Step 4: Retail Demand Vs Retail Supply at the Base Year -* At this stage, the adequacy of the existing retail provision is assessed. For example, if actual turnovers assessed in Step 3 exceed the benchmark turnovers,it could be argued that the floorspace is over-trading and, therefore, there may be an existing need for additional retail floorspace. Alternatively, if actual turnovers are less than benchmark levels then the floorspace may be assumed to be under- trading, signalling a potential over-supply of existing retail floorspace.

- *Step 5: Changes in Retail Demand and Retail Supply Through to the Design Years -* This step projects forward total available expenditure in the catchment area and the turnover of existing and committed retail floorspace. In simple terms, the difference between the forecast totals of available expenditure and retail turnover gives a measure of the need for additional retail floorspace. If there is an expenditure surplus, this is converted into potential floorspace by dividing by an appropriate sales density. Similarly, if there is an expenditure deficit, a floorspace over supply may exist. It is usual for retail assessments to consider the retailing situation 5 and 10 years from the base years, thus this Retail Update considers the retailing situation of Helensburgh town centre for the Design Years 2028 and 2033.

## 3.3 Principal Data Sources & Assumptions

3.3.1 The retail assessment provided in Section 4 of this Retail Study and is based on the following information sources and assumptions:

- *Population & Populations Projections –* The population for the identified Catchment Area has been derived from the well accepted source, Experian Small Area Datasets, which provides population projections for the base year 2023, and the two design years of 2028 and 2033.

- *Consumer Retail Expenditure per Head –* has been derived from the Experian Area Report generated specifically for the Helensburgh Catchment Area and provides comparison and convenience expenditure per head for the various zones of the catchment area for the base year 2023 and at a 2021 price base. The expenditure per head rates is projected forward to the two design years (2028 and 2033) by using the growth rates identified in the most up to date Experian Retail Planner Briefing Note 20, dated February 2023 (RPBN20).

  The RPBN is a well-accepted data source used by retail planners, property consultants and retailers and provides comprehensive up-to-date information on retail developments and short-medium- and long-term forecasts. The RPBN20 provides forecasts of expenditure growth for convenience and comparison

categories of retail spending to 2040 and provides sales densities for both convenience and comparison goods (both including and excluding Special Forms of Trading e.g., online retailing spend) and associated growth rate forecasts.

- *Shopping trip patterns and consumer retail expenditure flows* – The 2007 and 2011 Retail Studies based the allocation of retail comparison and convenience expenditure within and outside the catchment area on a Household telephone survey undertaken in 2007. The survey provided information on the 'Market Share' of the geographical extent of catchment areas and trade penetration around existing centres. It quantified the pattern and volume of retail expenditure flows from each of the defined zones (where people live, and money is generated) to a range of centres and out of centre stores (where people spend their money). No such survey is available for this Retail Study.

  In terms of comparison (non-food) shopping patterns and associated retail expenditure flows, it is generally considered that no significant new comparison floorspace has been provided either within the identified Helensburgh catchment area or the surrounding area that will considerably alter the market shares identified in the 2007 and 2011 Helensburgh Retail Studies. Therefore, based on commercial knowledge and experience relating to retail planning and markets, this Retail Study has assumed the markets shares identified in the previous (2007 & 2011) Retail Studies for the base year of 2023. In terms of where the comparison expenditure is spent, not surprisingly Glasgow City Centre attracts the largest proportion of expenditure from the catchment area, which is probably due to the range of retailers and products offered within the city centre of the conurbation. Other centres that attract a high proportion of comparison expenditure from the Helensburgh catchment area is the St James Retail Park in Dumbarton and the Clydebank Shopping Centre, when looking at the retailers represented within these centres. , Based on a retail knowledge of shopping patterns, it is considered that the more discount type retailers e.g. B&M, Home Bargains, Poundland etc could also potentially attract a proportion of retail spend out from the Helensburgh catchment area.

  With regard to convenience (food) shopping, it is recognised that the catchment's shopping behaviour and patterns will have changed since the 2007 Household Survey through the delivery of new food retailing provision both within the Helensburgh catchment area and surrounding towns. Most notably since the last 2011 Retail Study, Morrisons have commenced trading a supermarket within Helensburgh (this unit previously traded as a Waitrose foodstore) and now, along with the Co-op in Helensburgh town centre, it is considered that they serve the catchment area for food shopping. While the Morrisons supermarket will have assisted in clawing back a significant proportion of the catchment's convenience expenditure, it must also be recognised that the shopping facilities offered in the surrounding towns has similarly improved over the last 10 years. Such improvements include the opening of Lidl, Dumbarton, in 2020 and the opening of

Aldi in Alexandria in circa 2015, along with an additional store in 2021. While it is usually accepted that shoppers tend not to travel any distance for convenience shopping, the rise in the popularity of the discount retailers (e.g., Aldi, Lidl) has had a notable impact on shopping patterns. On this basis, given the lack of up-to-date survey information, the retail flows used in this study are based on an assessment of foodstores in Helensburgh and surrounding towns, together with grocery analysis information, professional retail knowledge, experience and judgement relating to food retailing.

- *Expenditure Inflow* – The 2011 Retail Survey assumed that by 2016 Helensburgh will increase its inflow expenditures for convenience and comparison goods to 10% and 20% of survey area expenditure respectively. This was based on the improvement works to the town centre and the CHORD (Campletown, Helensburgh, Oban, Rothesay and Dunoon) regeneration projects e.g., Colquhoun Square, Helensburgh. Given the development of the new Leisure Centre at the Waterfront site, it is considered this facility will also attract a high proportion of tourists / visitors into Helensburgh. On this basis, this Retail Study retains the expenditure inflows into Helensburgh town centre identified in the previous 2011 Retail Study of 10% and 20% of survey area expenditure for convenience and comparison goods respectively.

- *Existing Retail Floorspace Data* – retail floorspace data for both convenience and comparison goods has been obtained predominantly from an Experian GOAD Category Report for Helensburgh together with on-site survey work. However, reference has also been taken from the past 2007 and 2011 Helensburgh Retail Studies, together with retail assessments produced to support past planning applications for retail developments in Helensburgh.

- *Base Year* – this Retail Study adopts the current year of 2023 as the base year.

- *Design Years* - this Retail Study forecasts the retail need in two five-year intervals from the base year, thus the Design Years are 2028 and 2033.

- *Future Growth in Consumer Retail Expenditure Per Head* – as stated above the Experian RPBN20 provides the latest UK expenditure forecasts. Following the advice of Experian, this Retail Study adopts the comparison and convenience growth in retail spend per head identified in Table 7 of RPBN20 excluding Special Forms of Trading (SFT).

- *Special Forms of Trading* – following on from the above point, it is normal practice in the preparation of retail need studies to make deductions from the consumer retail expenditure per person figures adopted to allow for'special forms of trading' (SFT). This is retail expenditure that does not take place in shops, such as on-line, click and collect, home delivery, and collection / drop-off points.

The RPBN20 advises that the non-store market share of total retail sales volumes has been increasing year on year. It recognises that the trend accelerated in 2020 and 2021 due to the Covid pandemic and the associated general conflict of social distancing for in-store retailing. Notably over the pandemic the market share of SFT peaked to an average of 30.7% in 2021 (a 10.6% increase from two years earlier). As the Covid restrictions eased, the total share of SFT dropped to 29.6% in 2022. Experian advise that a further small decline in market share is anticipated in 2023, through certain users e.g., the elderly and less "digitally literate cohorts" returning to the traditional shopping and face to face habits. Notwithstanding the return of traditional retailing from this sector of society, Experian anticipates the market share of SFT will continue to grow to exceed 30% of retail sales in 2024 and is anticipated to be around 38% of retail sales by 2040.

Given the nuances of SFT it isn't appropriate to use total retail spend to calculate future demand for retail floorspace. Experian therefore provide growth rates for comparison and conveniences goods that take account the proportion of trading using traditional (face to face) floorspace; this is known as the 'adjusted growth rate' for retail spend per head. In estimating the catchment area's retail spend for the two design years, this Retail Study has applied the adjusted growth rates for both convenience and comparison goods, as stated in Table 7 of RPBN20.

- *Benchmark Turnovers -* To assess the scale of any over or under trading of the existing retail floorspace stock in Helensburgh at the base year of 2023, this Retail Study compares the estimated actual retail turnover, which is based on the catchment area's generated expenditure (for comparison and convenience goods), against the estimated benchmark turnover. This assessment is carried out separately for comparison goods and convenience goods floorspace.

  The Benchmark turnover estimates are based on the sales density information provided by the Experian RPBN20.

  The actual Benchmark turnover used in the Retail Study is derived by multiplying sales floorspace by the sales densities obtained from the source outlined above. The benchmark turnovers feed through into the assessment of retail floorspace need and are inclusive of appropriate growth rates applied for the two design years of 2028 and 2033. The benchmark turnovers use the consistent 2021 price base.

- Net to Gross Ratios – this Retail Study uses actual gross and net floorspace figures where they have been available from other retail studies, however in most cases this information is not available. It is therefore necessary to convert retail floorspace from the overall gross floorspace of a unit to the net sales area of a unit (or vice versa). The Retail Study maintains the floorspace ratios of past 2011 and 2007 Retail Studies, which use a 65:100 breakdown. Notably the previous retail studies do not break this level of floorspace down further for supermarkets in terms of food and non-food floorspace.

- Metric Conversion – for the avoidance of doubt, where necessary, this study has converted square feet into meters (and vice versa) on the basis that 1 square meter (sqm / $m^2$) is 10.764 sq foot (sqft/$ft^2$) and 1 $ft^2$ is 0.093 $m^2$.

- All figures presented in this Study have been rounded up.

# 4. Retail Audit & Market Assessment

## 4.1 Objectives

4.1.1 This section assesses the quantitative need for additional retail floorspace within Helensburgh. The quantitative assessment is carried out separately for convenience (food) goods and comparison (non-food) goods. As with the previous Retail Studies, this assessment is based on **two scenarios**.

- *Scenario 1* is the 'baseline' position and assumes the market share of the Helensburgh retail economy (as estimated at the base year of 2023) will remain constant through to the end date of 2033. Under this scenario, the town centre will maintain, but not enhance, its position in the retail hierarchy or clawback any market share of the expenditure generated by the catchment area.

- *Scenario 2* acknowledges there is scope for Helensburgh to clawback retail expenditure that is currently leaking out of the catchment area to competitor centres and that there are strong reasons to plan for an increase in the town's market share to a realistic level.

4.1.2 Under Scenario 2, adjustment to the market shares of Helensburgh town centre is made by the first design year of 2028 and then retained through to 2033. To balance this increase, the market shares of centres outside the catchment area is decreased, and potentially to a lesser extent there may be potential for a small amount of trade diversion from existing retailers within the catchment area who are outside the town centre.

4.1.3 By undertaking the two scenarios, as with the two previous Retail Studies, assessing quantitative need under both scenarios will provide the Council with likely **minimum** and **maximum** requirements for additional retail floorspace through to 2033.

4.1.4 Following on from the above section of this Study, this quantitative assessment provides the following information:

- Estimates of total available retail expenditure within the defined Helensburgh catchment area at the base year of 2023 and the two design years of 2028 and 2033;

- Estimates of the retail turnover likely to be 'retained' by Helensburgh catchment area, and specifically Helensburgh town centre, at the base and the two design years;

- Estimates of "headroom" expenditure and therefore retail floorspace need within Helensburgh town centre at the design years; and

- Quantitative retail floorspace need disaggregated into convenience goods and comparison goods retail floorspace.

4.1.5 It is understood that the results of the need assessment will be used by Argyll and Bute Council to inform the future redevelopment of the Helensburgh Waterfront site to provide a level of comfort over the ability of the town centre to accommodate additional retail floorspace.

## 4.2 Approach

4.2.1 This Retail Study separates the quantitative retail need assessments for comparison goods and convenience goods. Each scenario assessment is supported by a number of Tables (Appendix 2 and 3) which are based on the various key assumptions and data sources detailed in the above Section 3.

## 4.3 Comparison Goods Needs Assessment

4.3.1 Following the methodology stated in Section 3 of this Study, the following assessment of comparison retail need is undertaken. The relevant assessment Tables, for both Scenario 1 and Scenario 2, are provided in Appendix 2 of this Retail Study.

### Step 1: Calculate Catchment Area Total Available Expenditure

4.3.2 The catchment areas' total available expenditure is gained by multiplying the resident population by average annual expenditure per head provided by Experian specifically for each zone within the catchment area. This calculation is carried out for each of the seven zones which comprise the survey area. As stated above, the base information relating to population and retail expenditure has been derived from a well-accepted retail statistical source Experian, who generated the required information specifically for the defined catchment area.

4.3.3 Population estimates by zone and for the survey area are set out in **Table 1** for both Scenario 1 and Scenario 2. The Tables confirm the population for the base year 2023 and the two design years of 2028 and 2033. To provide some context with the previous Retail Studies, Table 1 provides the population for 2011 (as sourced from the 2011 Retail Study). Notably, as illustrated by Table 1 the population of the Helensburgh catchment area is forecasted to decline over the next 10 years.

4.3.4 **Table 2** confirms the Catchment's estimated annual expenditure for comparison goods for both Scenario's. Table 2 provides a breakdown of expenditure for residents living in each of the seven zones within the Catchment Area.

4.3.5 As stated above, the expenditure estimates have been derived from Experian specifically for the catchment area, and for the base year 2023. The expenditure estimates are forecasted to the design years of 2028 and 2033 by adopting the

expenditure growth rates identified in the RPBN20. The expenditure estimates exclude Special Forms of Trading (SFT), which is the expenditure that does not take place in shops e.g., on-line shopping, mail order shopping.

4.3.6 Table 2 identifies an 11% increase in comparison expenditure over the 10-year period of 2023 to 2033. The increase in available expenditure is due to the real growth in comparison goods expenditure per head and out-weighs the negative impact of a slowly falling population, as identified in Table 1. As seen in Table 2, the catchment's total available comparison expenditure in 2023 (base year) is £104.68million, increasing to £108.22million and £116.22million in the design years 2028 and 2033 respectively.

### Step 2: Application of "Market Share" to Determine Amount of Retained Expenditure

4.3.7 While Table 2 confirms the comparison retail expenditure generated by the catchment for the base and design years, as stated in Section 3 of this report, not all the identified expenditure will be spent within Helensburgh town centre. It is common sense to expect that competing retail centres outside Helensburgh will attract a proportion of the comparison expenditure generated by the catchment.

4.3.8 Section 3 above advises that the previous 2007 and 2011 Helensburgh Retail Studies based the allocation of expenditure for the catchment area on a Household telephone survey undertaken in 2007. That telephone survey provided information on the 'Market Share' of the geographical extent of catchment areas and trade penetration around existing centres by quantifying the pattern and volume of retail expenditure flows from each of the defined zones (where people live, and money is generated) to a range of centres and out of centre stores (where people spend their money). As previously highlighted, no such household survey is available for this Retail Study, therefore the market shares used in the 2007 & 2011 Helensburgh Retail Studies for comparison shopping have been adopted by this Retail Study for the base year of 2023.

4.3.9 The outflows and in-flows (market share) for comparison goods expenditure are illustrated in at **Table 3** for 2023 (for both Scenario 1 and 2). Table 3 is based on the expenditure flows identified in the previous two 2007 and 2011 Retail Studies for comparison shopping. It illustrates the catchment only retains circa 25% of the generated comparison expenditure, with around 75% of the expenditure being spent outside the Helensburgh area. Table 3 advises that Glasgow City Centre attracts the largest proportion of expenditure from the catchment area (which is probably due to the range of retailers and products offered within the conurbations city centre). Thereafter, other centres that attract a high proportion of comparison expenditure from the catchment area is the St James Retail Park in Dumbarton and the Clydebank Shopping Centre.

4.3.10 **Table 4** interprets the market-share information identified in Table 3 into monetary value and provides a summary of the turnover for Helensburgh town centre for 2023 base year. (The same information is replicated for Scenario 2 in Table 4). Table 4 also

introduces the inflow of expenditure, which as detailed in the above Section, is assumed to be 20% for the base year of 2023 and the two design years 2028 and 2033. Table 4 advises that (for both Scenario 1 and Scenario 2 the total comparison turnover for Helensburgh town centre in 2023 is £32.96million.

4.3.11 Of particular interest is that Table 4 estimates that approximately £77million of the catchment's comparison expenditure is spent outside the Helensburgh area. This in-itself shows that there is a need to improve the range of comparison offer within Helensburgh town centre.

### Step 3: Determine Whether the Existing Retail Economy is Trading at Equilibrium

4.3.12 At this stage of the assessment an important consideration is whether the existing comparison goods retail economy of Helensburgh town centre is (broadly) trading at equilibrium. If the amount of consumer retail expenditure flowing into the town centre is high in relation to the available retail floorspace, the town centre is over-trading and could accommodate additional retail floorspace. Conversely, if the expenditure flows are low relative to available retail floorspace, then it is considered the town centre is under-trading and would not be able to support additional retail provision.

4.3.13 If over trading is occurring in a centre, then it is commonly assumed that the turnover in-excess of the equilibrium position is potentially available to support new shopping provision (floorspace). If this occurs, then this element of expenditure should be added to the estimated headroom expenditure identified from the future growth of the retail economy. Conversely, if a centre is under-trading, then it would be logical to deduct the amount of turnover shortfall relative to the equilibrium position from the defined headroom expenditures associated with the future growth in the retail economy.

4.3.14 In estimating whether Helensburgh town centre is in retail equilibrium the use of a benchmark sales density is required. As stated above, for this Retail Study the benchmark sales density has been informed by the Experian RPBN20, which provides an average comparison retail sales density for the base year (2023) and the two design years (2028 and 2033). The "benchmark" comparison goods sales density for Helensburgh at the base year 2023 is set out in Table 5 (for both Scenario's 1 and 2) and is £4,581/sqm. The benchmark turnover is not specific to retailers within Helensburgh town centre as this turnover information is not available, but is a published average based on all types of comparison retailers and takes account of larger multi-national comparison retailers together with the small independent traders.

4.3.15 For comparison goods shopping, **Table 5** above indicates that in 2023, based on the shopping patterns of the 2007 household telephone survey for the catchment area, the retail floorspace in Helensburgh town centre is currently over-trading by around £4.63million per year. Thus, indicating that the town centres actual turnover is higher than that required for retailers in the area to achieve "benchmark" sales levels. This

illustrates that currently, at the base year, the retailers within Helensburgh town centre are trading over the national average sales density for comparison retailers.

### Step 4: Calculate Growth in Retained Expenditure to the Design Years

4.3.16 Having determined the base year level of retained comparison goods expenditure within Helensburgh town centre, the principle of market share is used to calculate how much more spending or trade the town could expect to attract in the future because of the forecast growth in available catchment area expenditure in five years (2028) and ten years (2033) time.

4.3.17 As stated above, the quantitative need (retail capacity) assessment for comparison goods has been carried out for two different scenarios as follows: -

- *Scenario 1* - which is based on the principle that the retail economy of Helensburgh will maintain its existing 2023 status and level of market share relative to competing centres through to 2028 and 2033. This constant market share approach provides an estimate of the quantum of additional comparison goods floorspace that will be required in the town to maintain its presentrole and level of attractiveness through a five- and ten-years period to 2028 and 2033.

- *Scenario 2* - Accepts that there is scope to improve the level of expenditure retained by the town centre and that this should be actively plannedfor through the provision of additional retail floorspace provision. This scenario is based upon an estimated, but realistic, upwards adjustment to the town's comparison goods market share to 35% (a rise of 10% from the base position) by 2028, which is maintained through to 2033. This is a conservative uplift and made on the premise of general current national retail market conditions and shopping behaviour.

4.3.18 Under *Scenario 1*, for each of the forecast years we apply the **same** market shares identified in 2023 (Table 3) to the increased "pools" of available comparison expenditure (Table 2). The calculations advise for Helensburgh town centre the comparison retail turnover in 2028 is £34.06million (**Table 6**) and in 2033 the comparison retail turnover is £36.47million (**Table 9**).

4.3.19 For *Scenario 2*, based on an adjusted increased market share through the claw back of expenditure, the forecasted comparison retail turnover for Helensburgh town centre in 2028 is £45.44million (**Table 7**) and £48.83million in 2033 (**Table 10**).

### Step 5: Determining the Level of Potential Headroom Expenditure in the Forecast Years

4.3.20 In terms of determining the level of potential headroom expenditure for the design years it would be wrong to assume that all the increase in turnover potential within Helensburgh town centre will be available by the forecast year(s) to support additional comparison goods shopping. A proportion of the forecast expenditure growth must go to the existing retailers, as it is well accepted that sales productivities generally

increase in real terms over time.

4.3.21 Following on from above point, with regard to the potential headroom in the design years, the 2023 turnover allocation (growth between 2023 – 2028 and 2023 - 2033) for existing retailers is deducted from the 2028 and 2033 turnover potential for Helensburgh town centre. This calculation produces an estimate of residual turnover potential for the town centre. The base year turnover is then subtracted from the 2028 residual turnover to determine the quantum of potential headroom expenditure available in 2028 in Helensburgh town centre. This calculation is undertaken for Scenario 1 in **Tables 7** and **10** and shows that there is a deficit of Headroom Expenditure in both 2028 and 2033. However, in Scenario 2, **Table 8** identified a Headroom Expenditure amounting to £11.15million in 2028 and **Table 11** identifies a Headroom Expenditure of £7.47million in 2033.

Step 6: Determine Level of Residual Headroom in the Forecasted Years

4.3.22 Following the above calculations (and in accordance with the past Retail Studies) the determination of the level of residual headroom expenditure in the design years of 2028 and 2033 is required to be undertaken. This will then identify the overall retail capacity or additional retail floorspace that the town centre can accommodate.

4.3.23 It is usual for deductions in headroom expenditure to be made to account of any committed comparison goods floorspace commitments in Helensburgh (these are retail developments that have planning permission). It has however been confirmed that there are no such commitments in the Helensburgh area, therefore no turnover deductions are required.

4.3.24 The estimated £4.63million of overtrading of Helensburgh town centre at 2023 has also to be taken into account in the calculation of residual headroom.

4.3.25 The final residual headroom expenditure totals for Helensburgh town centre at the design / forecasted years of 2028 and 2033 are set out in **Tables 8 and 11** for Scenario 1 and are £4.40million in 2028 and a deficit of £0.26million in 2033. For Scenario 2, where the market share is increased through expenditure clawback, the final residual headroom expenditure is identified in **Tables 9 and 12** and is £15.78milllion in 2028 and £12.10million in 2033. The residual headroom expenditure enables the quantitative need for additional retail floorspace in the town centre to be estimated.

4.3.26 The residual headroom expenditure totals provide an estimate of potential turnover which will be available to Helensburgh town centre in 2028 and 2033 for both Scenario 1 (where the current 2023 market share of expenditure does not change) and for Scenario 2 (where the market share of the catchment's comparison expenditure is adjusted upwards e.g. reattract / claw back expenditure into the town centre).

Step 7: Estimated Need for Additional Retail Floorspace

4.3.27 The last step of the retail capacity assessment is to convert the residual headroom expenditures into retail floorspace requirements. As stated above, the average sales densities used by this study for the two design years have been derived from RPBN20.

4.3.28 Under current conditions in 2023 base year, it is estimated that there is a current surplus of comparison expenditure in Helensburgh town centre, with **Table 5** estimating this to be approximately £4.63 million for both Scenario's.

4.3.29 Under Scenario 1, where the market share remains constant into the design years, by 2028, as stated above, it is anticipated there will be a residual of £4.40million of comparison expenditure. Applying the average sales densities for the design years, **Table 8** advises provides the justification for the provision of 917sqm net / 1,410sqm gross of additional comparison retail floorspace in 2028. However, the situation changes in 2033 (**Table 11**) where there is a deficit of comparison expenditure of £0.26million, resulting in a small oversupply of comparison retail floorspace of 44sqm net / 68sqm.

4.3.30 Under Scenario 2 the situation is different. As stated above, Scenario 2 assumes the upward adjustment of market share through the clawback of comparison retail expenditure. As a result, in 2028 **Table 9** advises that there is potential for the town centre to support 3,290sqm net / 5,061sqm gross of additional comparison retail floorspace. Following on from this **Table 12** confirms that in 2033 there is justification for the provision of 2,037sqm net / 3,133sqm gross of additional comparison retail floorspace in Helensburgh town centre.

## 4.4 Comparison Goods Needs Assessment - Summary

4.4.1 After the above assessment it can be concluded that there are sound reasons to plan for a realistic upwards shift of Helensburgh market share over the medium term, through the claw back of comparison expenditure. Scenario 2 is based on an uplift of retained expenditure from approximately 25% to roughly 35% of available comparison goods expenditure (a retention increase of 10%) for the whole of the catchment area, which is considered realistic given the current budgetary constraints and resultant change in shopping patterns stemming from the pandemic e.g., increased online spending for comparison goods. The primary justification for the uplift is that if the existing level of the town's retailer representation remains, the centre's market share will continue decline as the turnover level will be maintained, despite an increase in the level of comparison expenditure / retail spend. From the qualitative comparisons with other surrounding centres, and the results of this retail capacity assessment, it is clear that Helensburgh's current market share is modest. As illustrated by the above retail assessment, the catchment area's overall comparison retail expenditure is forecasted to continue to grow in real terms over the next decade. If the identified expenditure increase is not taken advantage of, in terms of the provision of new retail floorspace, and the town centre is left to "stand still", there is a real potential for Helensburgh town centre to experience decline.

## 4.5 Convenience Goods Needs Assessment

4.5.1 The retail need assessment for convenience goods floorspace follows the same approach as that for comparison goods (see above Section) and uses the same two Scenarios:

- *Scenario 1* (the benchmark) and is based on the principle that the retail economy of Helensburgh will maintain its existing status and level of market share relative to competing centres through to 2028 and 2033. This constant market share approach.
- *Scenario 2* which assumes an uplift in the Helensburgh catchment area's market shares to 90% as a whole, a 30% increase in retained expenditure.

4.5.2 The detailed calculations underpinning the analysis are reproduced in full in **Appendices 3** for both Scenario 1 and Scenario 2.

### Step 1: Calculate Total Available Expenditure in the Catchment Area

4.5.3 At **Table 2** (for both Scenario's), the catchment's total available convenience goods expenditure by zone is determined for the base year (2023) and the two design years of 2028 and 2033. The analysis incorporates Experian-based estimates of average annual spend per head on convenience goods for each zone, together with their latest expenditure growth forecasts. Expenditure spent by "special forms of trading" have been again excluded.

4.5.4 **Table 2** advises that the Catchment's total available convenience expenditure in the base year of 2023 is £76.53million. Thereafter, the catchment's convenience expenditure decreases to £70.19million and £65.68million in the design years 2028 and 2033 respectively. This equates to a decrease in expenditure of approximately £10.85million or 14% over the ten-year period from 2023 to 2033.

### Stage 2: Application of "Market Shares" to Determine Amount of Retained Expenditure

4.5.5 Based on an update assessment of the food retailing providers within the catchment area and in the surrounding area, together with information gain from Experian and experience and knowledge of the food retailing sector, the market shares for the each of the seven zones is outlined in **Table 3** for the base year 2023. The Table anticipates that the Helensburgh catchment as a whole retains around 70% of its convenience expenditure. Assuming the Co-op and Morrisons are predominantly used for the catchment's main food shopping and other food stores (both within and outside the town centre) are used for topping up shopping, Table 3 suggests that Helensburgh town centre accounts for approximately 35% of the convenience expenditure generated by the catchment area.

4.5.6 **Table 4** interprets market shares identified in Table 3 into monetary value as convenience goods expenditure. An allowance for in-flow expenditure into Helensburgh from consumers and tourists living outside our survey area is made (refer to Section 3 above); this figure is estimated to be around 10%, which is lower than the inflow for comparison shopping as food shopping is generally undertaken more locally than that for non-food goods. Table 4 calculates the total estimated convenience goods turnover for Helensburgh town centre at the base year of 2023 to be £29.47million.

### Stage 3: Determine Whether Existing Retail Economy is Trading at Equilibrium

4.5.7 For convenience goods shopping, the same calculations carried out earlier in relation to comparison goods and calculate the extent of any over or under-trading within Helensburgh at the base year (2023) is replicated. **Table 5** confirms that the current estimated convenience goods floorspace of Helensburgh town centre is slightly overtrading trading by £0.33million in the base year of 2023, which indicates the current convenience retail floorspace within the town centre is 'more or less' achieving the published benchmark (average) turnover for convenience floorspace sales density.

### Stage 4: Calculate Growth in Retained Expenditure through to the Forecast Years

4.5.8 Scenario 1 maintains the constant market shares for Helensburgh town centre. **Tables 6 and 9** provide the retained expenditure for the forecast years of 2028 and 2033 which are £27.03million and £25.30million respectively.

4.5.9 Under Scenario 2, the catchment's market share is adjusted so that around 90% of the Catchments generated convenience expenditure is retained within the area. Under this Scenario it is anticipated that Helensburgh town centre benefits approximately 60% of the locally generated expenditure. In this Scenario **Table 7** identifies Helensburgh town centre's total turnover in 2028 to be £46.31million and **Table 10** identifies a total turnover for the town centre of £43.53million in 2033.

### Step 5: Determine Level of Potential Headroom Expenditure in the Forecast Years

4.5.10 As noted above in the comparison assessment, the headroom expenditure is the total of money available to support additional convenience goods provision in the town prior to considering commitments. In addition, retail growth also has been deducted in the determination of the Headroom Expenditure.

4.5.11 **Tables 7 and 10** of Scenario 1 the levels of potential Headroom Expenditure within Helensburgh town centre are determined at the forecast years of 2028 and 2033. Both show that based on the constant market share approach for convenience expenditure there will be an over-supply of convenience retail floorspace within the town centre and a deficit of expenditure to support the retail facilities.

4.5.12 Under Scenario 2 the situation is different, with an identified Headroom Expenditure of £15.95million in 2028 (**Table 8**), falling to £13.06million in 2033 (**Table 11**).

### Step 6: Determine Level of Residual Headroom Expenditure at the Design Years

4.5.13 As stated in the previous paragraphs, the residual headroom expenditure takes account of any retail commitments within the town centre (of which there are none) and the identified over trading. The final adjusted residual expenditure totals represent the quantitative need for additional retail floorspace in Helensburgh at the forecast years. The adjusted residual headroom expenditures are then converted into retail floorspace requirements by using the average sales density provided by the Experian RPBN20 for convenience floorspace.

4.5.14 For Scenario 1, **Tables 8 and 11** sets out the estimated the convenience goods residual headroom expenditure for Helensburgh town centre at the forecast years of 2028 and 2033. **Table 8** anticipates there will be a deficit headroom expenditure of £3million within Helensburgh town centre in 2028 and **Table 11** estimates a deficit of £4.66million in 2033.

4.5.15 For Scenario 2, through the adjusted market share and expenditure clawback, **Table 9** confirms the adjusted headroom convenience expenditure in 2028 will be £16.28million; with **Table 12** advising an adjusted headroom of convenience expenditure of £13.39million in 2033.

### Step 7: Estimated Need for Additional Retail Floorspace

4.5.16 Under Scenario 1 at the design year of 2028, **Table 8** estimates there will be an over-supply of convenience retail floorspace of around 281sqm net / 432sqm gross floorspace. Similarly, **Table 11** estimates an over-supply of 437sqm net / 672sqm gross floorspace in 2033.

4.5.17 Under Scenario 2, where Helensburgh's town centre market share is increased to around 60% of the catchment's convenience expenditure, the situation is different. **Table 9** estimates capacity for 1,526sqm net / 2,347sqm gross floorspace of additional convenience retailing in 2028. **Table 12** estimates capacity for 1,258sqm / 1,935sqm gross floorspace in 2033.

## 4.6 Convenience Goods Needs Assessment Summary

4.6.1 After the above assessment it can be concluded that there are sound reasons to plan for a realistic upwards shift of Helensburgh market share over the medium term, through the claw back of convenience expenditure into Helensburgh town centre.

4.6.2 Scenario 1 clearly displays that a constant market share over the next ten years will potentially result in the town centre's decline and will not attract any future retailers that will improve the range of foodstore facilities. As a result, the current high leakage of expenditure out from the Catchment Area into surrounding towns will continue. Potentially without any improvement in the food retailing facilities in Helensburgh town centre the level of expenditure leakage could increase, as additional modern

supermarkets are developed and opened in the surrounding towns.

4.6.3 Conversely, Scenario 2 aims to clawback convenience expenditure into the town centre through the provision of an increased range of additional modern retail floorspace. While Scenario 2 does assume an overall increase in the catchment's market share of available expenditure spend from the existing circa 70% in 2023 to around 90% in the two design years, it is considered that this level is realistic given that the majority of shoppers prefer to shop locally for food and if the retail offer is sufficiently attractive and there is a good choice of shops to compete with the surrounding towns outwith the catchment. Notably, the forecasted available spend for 2028 and 2033 under Scenario 2 is sufficient to support a wide range of new food retailers. A new food store within the town centre will extend customer choice and reduce the need for residents to travel to other towns outside the catchment area to undertake a primary shop trip at these stores. Equally, reducing the need to travel for certain retailers offer would at the same time reduce the volume of car borne trips out of the Helensburgh catchment area for food shopping, thus reducing $C0^2$ omissions, and therefore contribute to the sustainability agenda and increased self-sufficiency.

# 5. Conclusions

## 5.1 Conclusion

5.1.1 This Retail Study provides an update on the 2007 and 2011 Retail Studies undertaken by Colliers for Argyll and Bute Council in relation to Helensburgh town centre.

5.1.2 In general terms the national retail landscape has transformed considerably since the last Retail Study was undertaken in 2011. This is predominantly due to changing consumer lifestyle and shopping patterns driven by the rise of internet / online shopping for all goods and accelerated by the recent global pandemic. Online shopping has shifted a large proportion of the market from physical shopping to technology led and logistics. As a result, traditional town centres, such as Helensburgh, have lost their market share, with demand being focused on the major retail centres of Edinburgh and Glasgow. The convenience retailing market in particular has experienced great change with the rise of the value-based (discount) grocers and the overtaking of Morrisons by Aldi as the UK's fourth biggest supermarket. It is therefore fair to surmise that town centres that offer essential local services (both retail and other) are likely to fare well in the medium term. However other centres that do not cater for the residents' needs are likely to require ongoing restructuring in terms of offer into the medium term.

5.1.3 This Retail Study has provided an update on the Helensburgh retail provision, as at the current time (2023) and possible future provision over the medium term of a five-to-ten-year time frame. It provides updated Population forecasts for the Helensburgh catchment area and projects a decrease in the area's population over the period of 2023 to 2033. This study also provides up-to-date retail expenditure data for the catchment area, together with updated retail turnover and sales densities information.

5.1.4 The capacity analysis assumed by this Retail Study follows the same approach undertaken for the past 2007 and 2011 Retail Studies for Helensburgh. The analysis provides estimated floorspace need for both comparison and convenience retail based on two scenarios:

5.1.5 Scenario 1 assumes that Helensburgh town centre retains its current market share in 2023, in terms of its attractiveness as a retail centre to other competing retail centres located in the surrounding area outside Helensburgh.

5.1.6 Scenario 2 assumes that Helensburgh town centre improves its attractiveness as a retail centre, through the provision of an improved range of retailers, and claws back some of the expenditure leakage that is currently being spent at other centres outside the catchment area.

## 5.2 Conclusion – Comparison Floorspace Need Assessment

5.2.1 For comparison floorspace under Scenario 1, with the current market share continuing e.g., the significant leakage of expenditure out from the catchment area, the capacity analysis identifies a small under supply of retail floorspace within the town centre currently in 2023. However, if the current market share is maintained due to retail growth the current over trading will be lost and result in an oversupply of retail floorspace in 2028 and 2033.

5.2.2 The situation is very different under the terms of Scenario 2, where Helensburgh town centre improves its market share from 25% to 35% and claws back a proportion of the current expenditure leakage. While this level of clawback is reasonable it is considered it is a conservative figure, with the potential to further increase. Under this scenario there would be a requirement for around 3,000 to 5,000sqm gross comparison floor space over the period 2028 to 2033. Such floorspace provision would accord with the current retailer demand for Helensburgh which is referenced in Section 2 of this Study.

## 5.3 Conclusion – Convenience Floorspace Need Assessment

5.3.1 In terms of convenience floorspace, the food shopping retail provision within the catchment area has changed significantly since the last Retail Study was undertaken in 2011. The opening of Morrisons supermarket on Cardross Road, Helensburgh has significantly improved the catchment's range of food shopping facilities and has resulted in clawing back a proportion of expenditure. Notwithstanding this improved food offer within the town, it is considered that a proportion of residents are still undertaking their main food shop at other centres.

5.3.2 Under the terms of Scenario 1 where the current market share continues there is little spare headroom to accommodate any new convenience retail floorspace. As a result, the current leakage of expenditure out from the catchment area into surrounding towns will continue. Furthermore, without any improvement in the food retailing facilities in Helensburgh town centre the current level of expenditure leakage could potentially increase as additional modern supermarkets are developed and opened in the surrounding towns, resulting in the decline of the overall town centre.

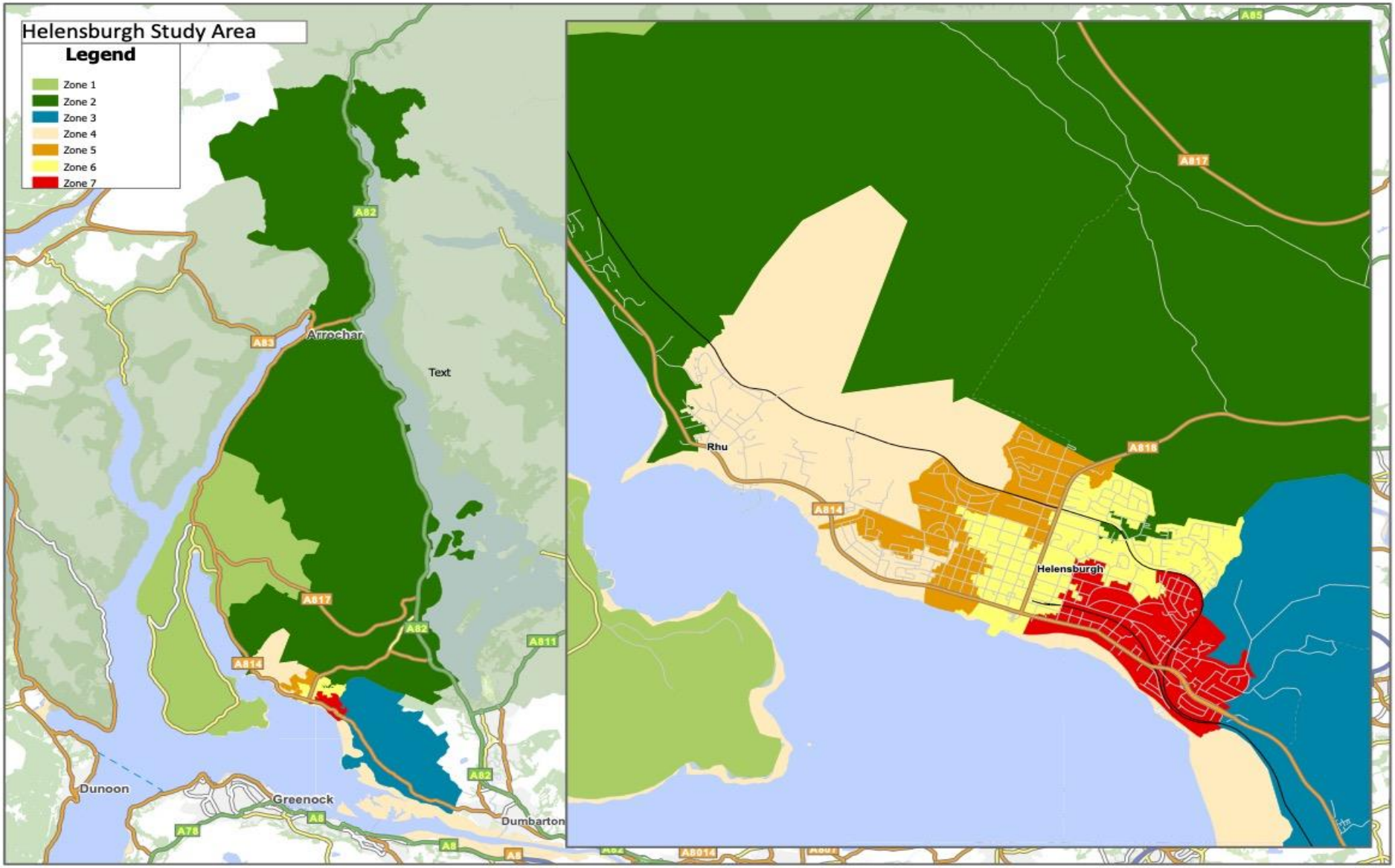
5.3.3 Conversely, the outlook for Helensburgh town centre is more positive under the terms of Scenario 2, which suggests an improved market share and clawback of expenditure leakage. This scenario assumes the town centres improves its food retail offer and thus increases its market share. Based on this reasonable scenario there would be sufficient expenditure available to justify the provision of around 2,000 to 2,500 sqm gross retail floor space in the medium to longer term. As stated above, such retail capacity would accord with the current food retail requirements mentioned in Section 2 of this Study.

## 5.4 Conclusion – Impact on Vitality & Viability

5.4.1 It is considered that the provision of new modern retail floorspace at the Helensburgh Waterfront site will assist in ensuring the town become as self-sufficient as possible, especially in relation to retailing provision, reclaiming leaked expenditure and complementing the other retail offer and supporting the various services provided within the town centre. Additional retailers of the type identified in the market assessment provided in Section 2 of this Retail Study will add a further dimension to the shaping and improving Helensburgh town centre. The potential to reduce the need to travel outside the Helensburgh area for food shopping will be a major benefit for the town centre as a whole due to the potential spin off effects of increased footfall both in terms of volume of visitors and length of time they will stay in the town centre.

# APPENDIX 1

## Helensburgh Catchment Area

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# APPENDIX 2

## Comparison Retail Floorspace Need Assessment

# Scenario 1: Constant Market Share

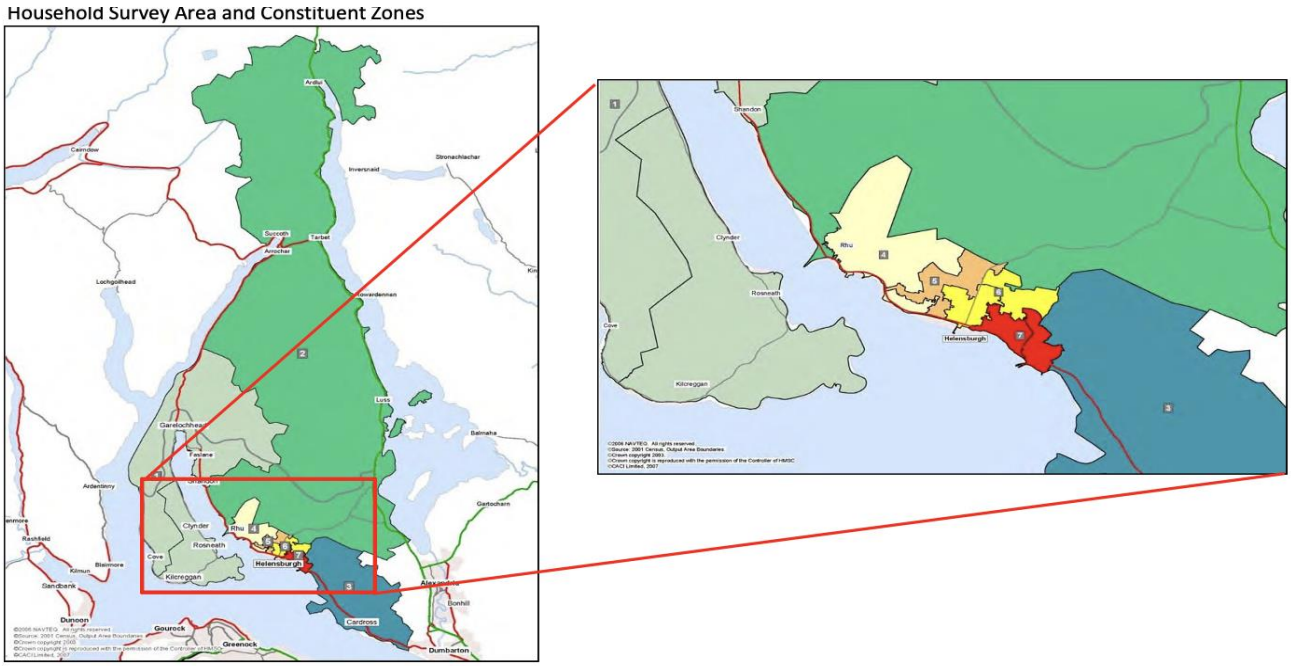


Table 1 – Population Change by Zone

| Table 1 – Catchment Population Change by Zone | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Zone** | **Area** | **2011 Population** (1) | **2023 Population Projection** (2) | **2028 Projected Population** (2) | **2033 Projected Population** (2) | **Population Change %** | |
| | | | | | | **2011 - 2023** | **2023 - 2033** |
| 1 | Cove | 6,742 | 5,074 | 4,885 | 4,708 | -1,668 | -366 |
| 2 | Arrochar | 2,183 | 1,722 | 1,611 | 1,561 | -461 | -161 |
| 3 | Cardross | 2,191 | 2,275 | 2,268 | 2,209 | 84 | -66 |
| 4 | Rhu | 2,273 | 2,219 | 2,112 | 2,046 | -54 | -173 |
| 5 | Helensburgh West | 2,918 | 2,574 | 2,512 | 2,442 | -344 | -132 |
| 6 | Helensburgh Central | 5,034 | 4,749 | 4,559 | 4,378 | -285 | -371 |
| 7 | Helensburgh East | 4,576 | 4,676 | 4,514 | 4,358 | 100 | -318 |
| **Total** | | **25,917** | **23,289** | **22,461** | **21,702** | **-2,628** | **-1,587** |

Notes
(1) Population figures for 2011 from 2011 Helensburgh Retail Update 2011.
(2) Population figures for the Catchment Area and individual Zones for 2023, 2028 and 2033 provided by Experian.

Table 2 – Catchment Area Total Available Expenditure on Comparison Goods by Zone

| Table 2 – Catchment Area Total Available Expenditure on Comparison Goods by Zone (Excluding Expenditure by Special Forms of Trading) | | | | |
|---|---|---|---|---|
| | Total Expenditure per Zone (£m) | | | **Total Increase 2023 – 2033 £m** |
| **Zone** | **2023** (1) | **2028** (1) | **2033** (1) | |
| **1** | 21.30 | 21.98 | 23.34 | |
| **2** | 8.22 | 8.24 | 8.80 | |
| **3** | 10.58 | 11.31 | 13.13 | |
| **4** | 10.64 | 10.86 | 11.59 | |
| **5** | 12.76 | 13.35 | 14.29 | |
| **6** | 21.85 | 22.48 | 23.79 | |
| **7** | 19.33 | 20.00 | 21.28 | |
| **Total** | **104.68** | **108.22** | **116.22** | **11.54** |

Notes

*(1)* Expenditure Per Zone were derived from information on expenditure per head figures gained from Experian for the Catchment Area Zones for 2023 at 2021 prices. Refer to Written Statement for detail on growth rates and allowance for special forms of trading.

Table 3 – Estimated Comparison Goods Centre Market Share by Zone in 2023 (Base Year)

| Table 3 – Estimated Comparison Goods Centre Market Share by Zone 2023 (Base Year) (%) | | | | | | | |
|---|---|---|---|---|---|---|---|
| | Consumer Demand: Where the Money Comes From (Zone) | | | | | | |
| **Retail Supply: Where the Money Is Spent** | **Zone 1** | **Zone 2** | **Zone 3** | **Zone 4** | **Zone 5** | **Zone 6** | **Zone 7** |
| **Within Catchment Area** | | | | | | | |
| Helensburgh Town Centre | 29.6 | 25.0 | 18.2 | 24.4 | 25.3 | 19.5 | 36.7 |
| All other locations / centres | 0.3 | 0.4 | *0* | 0 | 0 | 0 | 0 |
| *Sub-Total* | *29.9* | *25.4* | *18.2* | 24.4 | 25.3 | 19.5 | 36.7 |
| **Outside Catchment Area** | | | | | | | |
| Alexandria – Local Lomond Galleries | 0.0 | 0.0 | 0.1 | 0 | 0.9 | 0 | 0 |
| Alexandria Town Centre | 0.3 | 2.7 | 0.4 | 0.6 | 0 | 0 | 0 |
| Balloch – Loch Lomond Shoes | 0.0 | 1.2 | 1.3 | 0 | 1.8 | 0.9 | 0.7 |
| Braehead Retail Park –, Renfrew | 0.6 | 1.6 | 3.7 | 0.6 | 2.0 | 0.7 | 3.0 |
| Braehead Shopping centre, Renfrew | 5.9 | 2.8 | 12.6 | 5.7 | 8.2 | 5.2 | 6.7 |
| Clydebank Retail Parks | 3.1 | 5.6 | 8.3 | 5.5 | 3.1 | 6.8 | 5.5 |
| Clydebank Town centre | 9.6 | 6.4 | 2.6 | 3.5 | 1.9 | 6.0 | 7.2 |
| Drumchaple | 1.2 | 0 | 2.5 | 0.2 | 0 | 0.2 | 0 |
| Dumbarton – St James Retail Park | 12.2 | 11.2 | 13.3 | 7.9 | 4.8 | 4.8 | 3.3 |
| Dumbarton Town centre | 5.1 | 9.2 | 4.0 | 3.7 | 5.1 | 2.7 | 4.5 |
| Edinburgh | 1.7 | 1.0 | 0.2 | 0.9 | 1.3 | 0 | 0.1 |
| Glasgow City Centre | 21.9 | 23.4 | 25.2 | 37.1 | 33.3 | 38.5 | 28.5 |
| Glasgow Retail Parks | 6.7 | 7.4 | 4.1 | 8.2 | 8.0 | 10.1 | 0.9 |
| Greenock Town centre | 0 | 0.8 | 0.4 | 0 | 0 | 0 | 0.4 |
| Paisley Town centre | 0.3 | 0.4 | 0 | 0 | 0.4 | 0 | 0 |
| Renfrew Town Centre | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Stirling | 0.8 | 1.0 | 1.5 | 0.5 | 1.0 | 1.3 | 1.4 |
| Other | 0.7 | 0.0 | 1.6 | 1.2 | 3.0 | 3.4 | 0.9 |
| *Sub-Total* | *70.1* | *74.6* | *81.8* | *75.6* | *74.7* | *80.5* | *63.3* |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

Notes

(1) Refer to Section 3 of Written Statement for Market Share information.

Table 4 – All Comparison Goods Expenditure Pattern and Centre Turnover Estimates in 2023 (Base Year)

| Table 4 - All Comparison Goods Expenditure Pattern and Centre Turnover Estimates<br>Catchment Area<br>2023<br>(£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Catchment Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [2] | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 6.30 | 2.06 | 1.93 | 2.60 | 3.23 | 4.26 | 7.09 | 27.47 | 5.49 | 32.96 |
| All other locations / centres | 0.06 | *0.03* | *0* | 0 | 0 | 0 | 0 | *0.09* | | |
| *Sub-Total* | *6.36* | *2.09* | *1.93* | 2.60 | 3.23 | 4.26 | 7.09 | 27.56 | | |
| **Outside Catchment Area** | | | | | | | | | | |
| *Sub-Total* | *14.94* | *6.13* | *8.65* | *8.04* | *9.53* | *17.59* | *12.24* | 77.12 | | |
| **Total [3]** | **21.30** | **8.22** | **10.58** | **10.64** | **12.76** | **21.85** | **19.33** | **104.68** | | |

Notes
(1) From Table 3.
(2) Refer to Table 3 for expenditure flows.
(3) From Table 2

Table 5 – Estimated All Comparison Good Expenditure Patterns and Centre Turnover in 2023 (Base Year)

| Table 5 – Estimated All Comparison Good Expenditure Patterns and Centre Turnover 2023 (Base Year) (£m) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Comparison Goods Turnover Potential | Comparison Goods Floorspace ($m^2$ net) | Average Sales Density (£/$m^2$ net) | Benchmark Average Sales Density (£/$m^2$ net) | Benchmark Comparison Goods Turnover (£m) | Extent of Any Over/Under Trading (£m) |
| | A [1] | B [1] | C=A+B | D=C/D [2] | E | F [2] | G=FXD | H |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | 27.47 | 5.49 | 32.96 | 6,185 | 5,329 | 4,581 | 28.33 | +4.63 |
| All other locations / centres | 0.09 | | | | | | | |
| *Sub-Total* | 27.56 | | | | | | | |
| **Outside Catchment Area** | | | | | | | | |
| *Sub-Total* | 77.12 | | | | | | | |
| **Total [3]** | **104.68** | | | | | | | |

Notes
(1) From Table 4.
(2) Refer to Section 3 of Written Statement.
(3) From Table 2.

Table 6 – All Comparison Goods Expenditure Pattern and Centre Turnover Estimates in 2028

| Table 6 – All Comparison Goods Expenditure Pattern and Centre Turnover Estimates<br>Catchment Area<br>2028<br>(£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Catchment Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure [2] | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 6.51 | 2.06 | 2.06 | 2.65 | 3.38 | 4.38 | 7.34 | 28.38 | 5.68 | 34.06 |
| All other locations / centres | 0.06 | *0.03* | *0* | 0 | 0 | 0 | 0 | *0.09* | | |
| *Sub-Total* | *6.57* | *2.09* | *2.06* | 2.65 | 3.38 | 4.38 | 7.34 | *28.47* | | |
| **Outside Catchment Area** | | | | | | | | | | |
| *Sub-Total* | 15.41 | 6.15 | 9.25 | 8.21 | 9.97 | 18.10 | 12.66 | 79.75 | | |
| **Total [3]** | **21.98** | **8.24** | **11.31** | **10.86** | **13.35** | **22.48** | **20.00** | **108.22** | | |

Notes
(1) From Table 3.
(2) Refer to Section 3 of Written Statement.
(3) From Table 2.

Table 7 - Calculation of Potential Comparison Goods Headroom Expenditure in 2028

| Table 7 - Calculation of Potential Comparison Goods Headroom Expenditure<br>Helensburgh Town Centre<br>2028<br>(£m) | | | | | |
|---|---|---|---|---|---|
| Centre | 2023 Turnover (Base Year) | 2028 Turnover Potential | Turnover Allocation for Existing Retailing 2023-2028 | Residual Turnover Potential at 2028 | Headroom Expenditure at 2028 |
| | A | B | C | D | E |
| | (1) | (2) | (3) | D=B-C | E=D-A |
| **Within Catchment Area** | | | | | |
| Helensburgh Town Centre | 32.96 | 34.06 | 1.33 | 32.73 | -0.23 |
| **Total** | **32.96** | **34.06** | **1.33** | **32.73** | **-0.23** |

Notes
(1) From Table 4.
(2) From Table 6.
(3) Refer to Section 3 of Written Statement.

Table 8 - Comparison Goods Floorspace Need in Helensburgh in 2028

| Table 8 - Comparison Goods Floorspace Need<br>Helensburgh Town Centre<br>2028 | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Headroom Expenditure at 2028 (£m) | Forecast Turnover at 2028 of Commitments (£m) | Adjusted Headroom Expenditure at 2028 after commitments (£m) | Adjustment for Over / Under Trading at Base Year (£m) | Adjusted Residual Headroom Expenditure at 2028 (£m) | Assumed Average Sales density at 2028 (£/m$^2$ net) | Estimated Retail Floorspace Need in 2028 (m$^2$ net) | Estimated Retail Floorspace Need in 2028 (m$^2$ gross) |
| | A | B | C | D | E | F | G | H |
| | (1) | | C=A+B | (2) | E=C+D | (3) | G=E/F | H=G X 100/65 |
| **Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | -0.23 | 0.00 | -0.23 | +4.63 | 4.40 | 4,796 | 917 | 1,410 |
| **Total** | **-0.23** | **0.00** | **-0.23** | **+4.63** | **4.40** | **4,796** | **917** | **1,410** |

Notes
(1) From Table 7.
(2) From Table 5.
(3) Refer to Section 3 of Written Statement.

Table 9 - All Comparison Goods Expenditure Pattern and Centre Turnover Estimates in 2033

| Table 9 - All Comparison Goods Expenditure Pattern and Centre Turnover Estimates<br>Catchment Area<br>2033<br>(£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Catchment Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [2] | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 6.91 | 2.20 | 2.39 | 2.83 | 3.61 | 4.64 | 7.81 | 30.39 | 6.08 | 36.47 |
| All other locations / centres | *0.07* | 0.04 | *0* | 0 | 0 | 0 | 0 | *0.11* | | |
| *Sub-Total* | *6.98* | *2.24* | *2.39* | *2.83* | *3.63* | *4.64* | *7.81* | *30.50* | | |
| **Outside Catchment Area** | | | | | | | | | | |
| *Sub-Total* | *16.36* | *6.56* | *10.74* | *8.76* | *10.68* | *19.15* | *13.47* | 85.72 | | |
| **Total [3]** | 23.34 | 8.80 | 13.13 | 11.59 | 14.29 | 23.79 | 21.28 | 116.22 | | |

Notes
(1) From Table 3.
(2) Refer to Section 3 of Written Statement.
(3) From Table 2.

Table 10 - Calculation of Potential Comparison Goods Headroom Expenditure in 2033

| Table 10 - Calculation of Potential Comparison Goods Headroom Expenditure<br>Helensburgh Town Centre<br>2033<br>(£m) | | | | | |
|---|---|---|---|---|---|
| Centre | 2023 Turnover (Base Year) | 2033 Turnover Potential | Turnover Allocation for Existing Retailing 2023-2033 | Residual Turnover Potential at 2033 | Headroom Expenditure at 2033 |
| | A | B | C | D | E |
| | (1) | (2) | (3) | D=B-C | E=D-A |
| **Within Catchment Area** | | | | | |
| Helensburgh Town centre | 32.96 | 36.47 | 8.40 | 28.07 | -4.89 |
| **Total** | **32.96** | **36.47** | **8.40** | **28.07** | **-4.89** |

Notes
(1) From Table 5.
(2) From Table 9.
(3) Refer to Written Statement.

Table 11- Comparison Goods Floorspace Need in Helensburgh in 2033

| Table 11 - Comparison Goods Floorspace Need<br>Helensburgh Town Centre<br>2033 | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Headroom Expenditure at 2033 | Forecast Turnover at 2033 of Commitments (£m) | Adjusted Headroom Expenditure at 2033 after commitments (£m) | Adjustment for Over / Under Trading at Base Year (£m) | Adjusted Residual Headroom Expenditure at 2033 (£M) | Assumed Average Sales density at 2033 (£/m² net) | Estimated Retail Floorspace Need in 2028 (m² net) | Estimated Retail Floorspace Need in 2028 (m² gross) |
| | A | B | C | D | E | F | G | H |
| | (1) | | C=A+B | (2) | E=C+D | (3) | G=E/F | H=G X 100/65 |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | -4.89 | 0.00 | -4.89 | 4.63 | -0.26 | 5,939 | -44 | -68 |
| **Total** | **-.4.89** | **0.00** | **-4.89** | **4.63** | **-0.26** | **-** | **-44** | **-68** |

Notes
(1) From Table 10.
(2) From Table 5.
(3) Refer to Section 3 of Written Statement.

# Scenario 2: Market Shares Adjusted Upwards

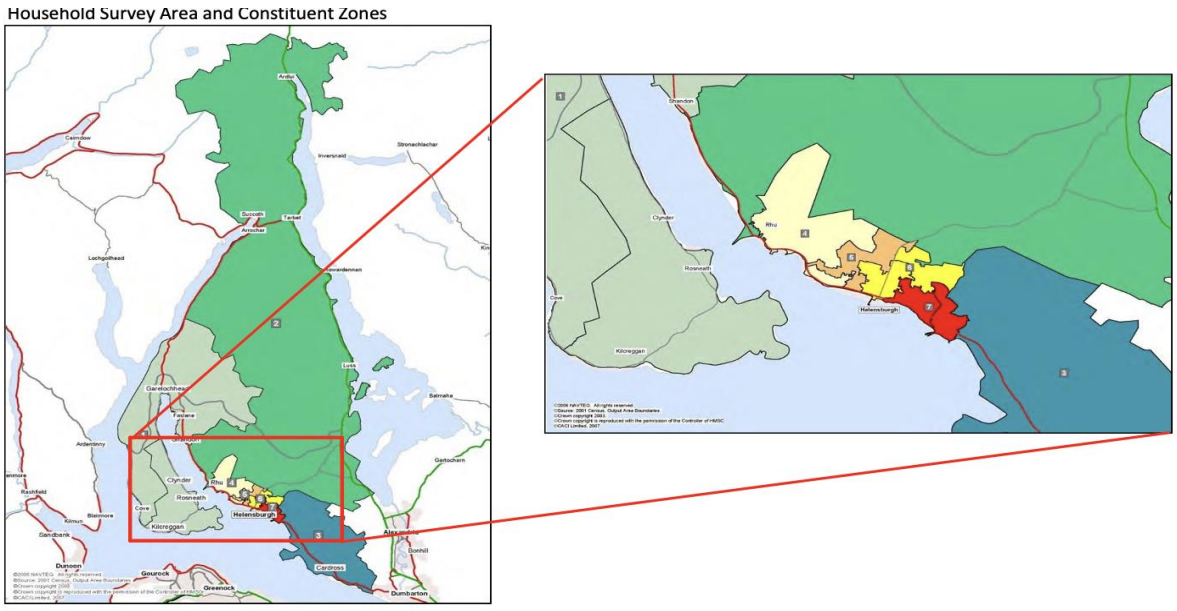


Table 1- Catchment Area Population Change by Zone

| Table 1 – Catchment Area Population Change by Zone | | | | | | | |
|---|---|---|---|---|---|---|---|
| Zone | Area | 2011 Population (1) | 2023 Population Projection (2) | 2028 Projected Population (2) | 2033 Projected Population (2) | Population Change % | |
| | | | | | | 2011 - 2023 | 2023 - 2033 |
| 1 | Cove | 6,742 | 5,074 | 4,885 | 4,708 | -1,668 | -366 |
| 2 | Arrochar | 2,183 | 1,722 | 1,611 | 1,561 | -461 | -161 |
| 3 | Cardross | 2,191 | 2,275 | 2,268 | 2,209 | 84 | -66 |
| 4 | Rhu | 2,273 | 2,219 | 2,112 | 2,046 | -54 | -173 |
| 5 | Helensburgh West | 2,918 | 2,574 | 2,512 | 2,442 | -344 | -132 |
| 6 | Helensburgh Central | 5,034 | 4,749 | 4,559 | 4,378 | -285 | -371 |
| 7 | Helensburgh East | 4,576 | 4,676 | 4,514 | 4,358 | 100 | -318 |
| Total | | 25,917 | 23,289 | 22,461 | 21,702 | -2,628 | -1,587 |

Notes

(1) Population figures for 2011 from 2011 Helensburgh Retail Update 2011.

(2) Population figures for the Catchment Area and individual Zones for 2023, 2028 and 2033 provided by Experian.

Table 2– Catchment Area Total Available Expenditure on Comparison Goods by Zone

| Table 2 – Catchment Area Total Available Expenditure on Comparison Goods by Zone (Excluding Expenditure by Special Forms of Trading) | | | | |
|---|---|---|---|---|
| | Total Expenditure per Zone (£m) [1] | | | **Total Increase 2023 – 2033 £m** |
| **Zone** | **2023** | **2028** | **2033** | |
| **1** | 21.30 | 21.98 | 23.34 | |
| **2** | 8.22 | 8.24 | 8.80 | |
| **3** | 10.58 | 11.31 | 13.13 | |
| **4** | 10.64 | 10.86 | 11.59 | |
| **5** | 12.76 | 13.35 | 14.29 | |
| **6** | 21.85 | 22.48 | 23.79 | |
| **7** | 19.33 | 20.00 | 21.28 | |
| **Total** | **104.68** | **108.22** | **116.22** | **11.54** |

Notes

*(1)* Expenditure Per Zone were derived from information on Expenditure per head figures gained from Experian for the Catchment Area Zones for 2023 at 2021 prices. Refer to Written Statement for detail on growth rates and allowance for special forms of trading.

Table 3 – Estimated Comparison Goods Centre Market Share by Zone in 2023 (Base Year)

| Table 3 – Estimated Comparison Goods Centre Market Share by Zone 2023 (Base Year) (%) | | | | | | | |
|---|---|---|---|---|---|---|---|
| | Consumer Demand: Where the Money Comes From (Zone) | | | | | | |
| **Retail Supply: Where the Money Is Spent** | **Zone 1** | **Zone 2** | **Zone 3** | **Zone 4** | **Zone 5** | **Zone 6** | **Zone 7** |
| **Within Catchment Area** | | | | | | | |
| Helensburgh Town Centre | 29.6 | 25.0 | 18.2 | 24.4 | 25.3 | 19.5 | 36.7 |
| All other locations / centres | 0.3 | 0.4 | *0* | 0 | 0 | 0 | 0 |
| *Sub-Total* | *29.9* | *25.4* | *18.2* | 24.4 | 25.3 | 19.5 | 36.7 |
| **Outside Catchment Area** | | | | | | | |
| Alexandria – Local Lomond Galleries | 0.0 | 0.0 | 0.1 | 0 | 0.9 | 0 | 0 |
| Alexandria Town Centre | 0.3 | 2.7 | 0.4 | 0.6 | 0 | 0 | 0 |
| Balloch – Loch Lomond Shoes | 0.0 | 1.2 | 1.3 | 0 | 1.8 | 0.9 | 0.7 |
| Braehead Retail Park –, Renfrew | 0.6 | 1.6 | 3.7 | 0.6 | 2.0 | 0.7 | 3.0 |
| Braehead Shopping centre, Renfrew | 5.9 | 2.8 | 12.6 | 5.7 | 8.2 | 5.2 | 6.7 |
| Clydebank Retail Parks | 3.1 | 5.6 | 8.3 | 5.5 | 3.1 | 6.8 | 5.5 |
| Clydebank Town centre | 9.6 | 6.4 | 2.6 | 3.5 | 1.9 | 6.0 | 7.2 |
| Drumchaple | 1.2 | 0 | 2.5 | 0.2 | 0 | 0.2 | 0 |
| Dumbarton – St James Retail Park | 12.2 | 11.2 | 13.3 | 7.9 | 4.8 | 4.8 | 3.3 |
| Dumbarton Town centre | 5.1 | 9.2 | 4.0 | 3.7 | 5.1 | 2.7 | 4.5 |
| Edinburgh | 1.7 | 1.0 | 0.2 | 0.9 | 1.3 | 0 | 0.1 |
| Glasgow City Centre | 21.9 | 23.4 | 25.2 | 37.1 | 33.3 | 38.5 | 28.5 |
| Glasgow Retail Parks | 6.7 | 7.4 | 4.1 | 8.2 | 8.0 | 10.1 | 0.9 |
| Greenock Town centre | 0 | 0.8 | 0.4 | 0 | 0 | 0 | 0.4 |
| Paisley Town centre | 0.3 | 0.4 | 0 | 0 | 0.4 | 0 | 0 |
| Renfrew Town Centre | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Stirling | 0.8 | 1.0 | 1.5 | 0.5 | 1.0 | 1.3 | 1.4 |
| Other | 0.7 | 0.0 | 1.6 | 1.2 | 3.0 | 3.4 | 0.9 |
| *Sub-Total* | *70.1* | *74.6* | *81.8* | *75.6* | *74.7* | *80.5* | *63.3* |
| **Total** | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

Notes:
(1) Refer to Section 3 of Written Report.

Table 4 – All Comparison Goods Expenditure Pattern and Centre Turnover Estimates 2023 (Base Year)

| Table 4 - All Comparison Goods Expenditure Pattern and Centre Turnover Estimates 2023 (Base Year) (£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Catchment Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [2] | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 6.30 | 2.06 | 1.93 | 2.60 | 3.23 | 4.26 | 7.09 | 27.47 | 5.49 | 32.96 |
| All other locations / centres | 0.06 | *0.03* | *0* | 0 | 0 | 0 | 0 | *0.09* | | |
| *Sub-Total* | *6.36* | *2.09* | *1.93* | 2.60 | 3.23 | 4.26 | 7.09 | *27.56* | | |
| **Outside Catchment Area** | | | | | | | | | | |
| *Sub-Total* | *14.94* | *6.13* | *8.65* | *8.04* | *9.53* | *17.59* | *12.24* | *77.12* | | |
| **Total [3]** | **21.30** | **8.22** | **10.58** | **10.64** | **12.76** | **21.85** | **19.33** | **104.68** | | |

Notes
(1) Table 3.
(2) Refer to Section 3 of Written Statement.
(3) From Table 2.

Table 5 – Estimated All Comparison Good Expenditure Patterns and Centre Turnover 2023 (Base Year)

| Table 5 – Estimated All Comparison Good Expenditure Patterns and Centre Turnover 2023 (Base Year) (£m) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Comparison Goods Turnover Potential | Comparison Goods Floorspace ($m^2$ net) | Average Sales Density (£/$m^2$ net) | Benchmark Average Sales Density (£/$m^2$ net) | Benchmark Comparison Goods Turnover (£m) | Extent of Any Over/Under Trading (£m) |
| | A [1] | B [1] | C=A+B | D [2] | E =C/D | F [2] | G=FXD | H |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | 27.47 | 5.49 | 32.96 | 6,185 | 5,329 | 4,581 | 28.33 | 4.63 |
| All other locations / centres | *0.09* | | | | | | | |
| *Sub-Total* | *27.56* | | | | | | | |
| **Outside Catchment Area** | | | | | | | | |
| *Sub-Total* | *77.12* | | | | | | | |
| **Total** | **104.68** | | | | | | | |

Notes
(1) From Table 4
(2) Refer to Section 3 of Written Statement.

Table 6 - Adjusted Comparison Goods Centre Market Share by Zone in 2028

| Table 6 - Adjusted Comparison Goods Centre Market Share by Zone 2028 (%) | | | | | | | |
|---|---|---|---|---|---|---|---|
| | Consumer Demand: Where the Money Comes From (Zone) [1] | | | | | | |
| **Retail Supply: Where the Money Is Spent** | **Zone 1** | **Zone 2** | **Zone 3** | **Zone 4** | **Zone 5** | **Zone 6** | **Zone 7** |
| **Within the Study Area** | | | | | | | |
| Helensburgh Town Centre | 35.0 | 35.0 | 35.0 | 35.0 | 35.0 | 35.0 | 35.0 |
| All other locations / centres | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| *Sub-Total* | *35.0* | *35.0* | *35.0* | *35.0* | *35.0* | *35.0* | *3500* |
| **Outside Survey Area** | | | | | | | |
| Alexandria – Local Lomond Galleries | | | | | | | |
| Alexandria Town Centre | | | | | | | |
| Balloch – Loch Lomond Shoes | | | | | | | |
| Braehead Retail Park – Renfrew | | | | | | | |
| Braehead Shopping centre, Renfrew | | | | | | | |
| Clydebank Retail Parks | | | | | | | |
| Clydebank Town Centre | | | | | | | |
| Drumchapel | | | | | | | |
| Dumbarton – St James Retail Park | | | | | | | |
| Dumbarton Town centre | | | | | | | |
| Edinburgh | | | | | | | |
| Glasgow City Centre | | | | | | | |
| Glasgow Retail Parks | | | | | | | |
| Greenock Town Centre | | | | | | | |
| Paisley Town Centre | | | | | | | |
| Renfrew Town Centre | | | | | | | |
| Stirling | | | | | | | |
| Other | | | | | | | |
| *Sub-Total* | *65.0* | *65.0* | *65.0* | *65.0* | *65.0* | *65.0* | *65.0* |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

Notes

(1) Refer to Section 4 of Written Statement.

Table 7 – Adjusted All Comparison Goods Expenditure Pattern and Centre Turnover Estimates in 2028

| Table 7 - Adjusted All Comparison Goods Expenditure Pattern and Centre Turnover Estimates 2028 (£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Catchment Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [2] | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 7.69 | 2.88 | 3.96 | 3.80 | 4.67 | 7.87 | 7.00 | 37.87 | 7.57 | 45.44 |
| All other locations / centres | 0 | *0* | *0* | 0 | 0 | 0 | 0 | 0 | | |
| *Sub-Total* | *7.69* | *2.88* | *3.96* | 3.80 | 4.67 | 7.87 | 7.00 | *37.87* | | |
| **Outside Catchment Area** | | | | | | | | | | |
| *Sub-Total* | *14.29* | *5.36* | *7.35* | *7.06* | *6.68* | *14.61* | 13.00 | *70.35* | | |
| Total [3] | 21.98 | 8.24 | 11.31 | 10.86 | 13.35 | 22.48 | 20.00 | 108.22 | | |

Notes
(1) From Table 6.
(2) Refer to Section 3 of Written Statement.
(3) From Table 2.

Table 8 - Calculation of Potential Comparison Goods Headroom Expenditure in 2028

| Table 8 - Calculation of Potential Comparison Goods Headroom Expenditure<br>Helensburgh Town Centre<br>2028<br>(£m) | | | | | |
|---|---|---|---|---|---|
| Centre | 2023 Turnover (Base Year) | 2028 Turnover Potential | Turnover Allocation for Existing Retailing 2023-2028 | Residual Turnover Potential at 2028 | Headroom Expenditure at 2028 |
| | A | B | C | D | E |
| | (1) | (2) | (3) | D=B-C | E=D-A |
| **Within Catchment Area** | | | | | |
| Helensburgh Town Centre | 32.96 | 45.44 | 1.33 | 44.11 | 11.15 |
| **Total** | **32.96** | **45.44** | **1.33** | **44.11** | **11.15** |

Notes
(1) From Table 4.
(2) From Table 7.
(3) Refer to Section 3 of Written Statement.

Table 9 - Comparison Goods Floorspace Need in Helensburgh in 2028

| Table 9 - Comparison Goods Floorspace Need<br>Helensburgh Town Centre<br>2028 | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Headroom Expenditure at 2028 | Forecast Turnover at 2028 of Commitments (£m) | Adjusted Headroom Expenditure at 2028 after commitments (£m) | Adjustment for Over / Under Trading at Base Year (£m) | Adjusted Residual Headroom Expenditure at 2028 (£m) | Assumed Average Sales density at 2028 (£/m$^2$ net) | Estimated Retail Floorspace Need in 2028 (m$^2$ net) | Estimated Retail Floorspace Need in 2028 (m$^2$ gross) |
| | A | B | C | D | E | F | G | H |
| | (1) | | C=A+B | (2) | E=C+D | (3) | G=E/F | H=G X 100/65 |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town centre | 11.15 | 0.00 | 11.15 | 4.63 | 15.78 | 4,796 | 3,290 | 5,061 |
| **Total** | **11.15** | **0.00** | **11.15** | **4.63** | **15.78** | **-** | **3,290** | **5,061** |

Notes
(1) From Table 8.
(2) From Table 5.
(3) Refer to Section 3 of Written Statement.

Table 10 - All Comparison Goods Expenditure Pattern and Centre Turnover Estimates in 2033

| Table 10 - All Comparison Goods Expenditure Pattern and Centre Turnover Estimates 2033 (£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Study Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [2] | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 8.17 | 3.08 | 4.60 | 4.06 | 5.00 | 8.33 | 7.45 | 40.69 | 8.14 | 48.83 |
| All other locations / centres | *0* | 0 | *0* | 0 | 0 | 0 | 0 | 0 | | |
| *Sub-Total* | *8.17* | *3.08* | *4.60* | *4.06* | *5.00* | *8.33* | *7.45* | *40.69* | | |
| **Outside Catchment Area** | | | | | | | | | | |
| *Sub-Total* | *15.17* | *5.72* | *8.53* | *7.53* | *9.29* | *15.46* | *13.83* | 75.53 | | |
| Total [3] | 23.34 | 8.80 | 13.13 | 11.59 | 14.29 | 23.79 | 21.28 | 116.22 | | |

Notes
(1) From Table 6.
(2) Refer to Section 4 of Written Statement.
(3) From Table 2.

Table 11 - Calculation of Potential Comparison Goods Headroom Expenditure in 2033

| Table 11- Calculation of Potential Comparison Goods Headroom Expenditure<br>Helensburgh Town Centre<br>2033<br>(£m) | | | | | |
|---|---|---|---|---|---|
| Centre | 2023 Turnover (Base Year) | 2033 Turnover Potential | Turnover Allocation for Existing Retailing 2023-2033 | Residual Turnover Potential at 2033 | Headroom Expenditure at 2033 |
| | A | B | C | D | E |
| | (1) | (2) | (3) | D=B-C | E=D-A |
| **Within Catchment Area** | | | | | |
| Helensburgh Town Centre | 32.96 | 48.83 | 8.40 | 40.43 | 7.47 |
| **Total** | **32.96** | **48.83** | **8.40** | **40.43** | **7.47** |

Notes
(1) From Table 4.
(2) From Table 10.
(3) Refer to Section 4 of Written Statement.

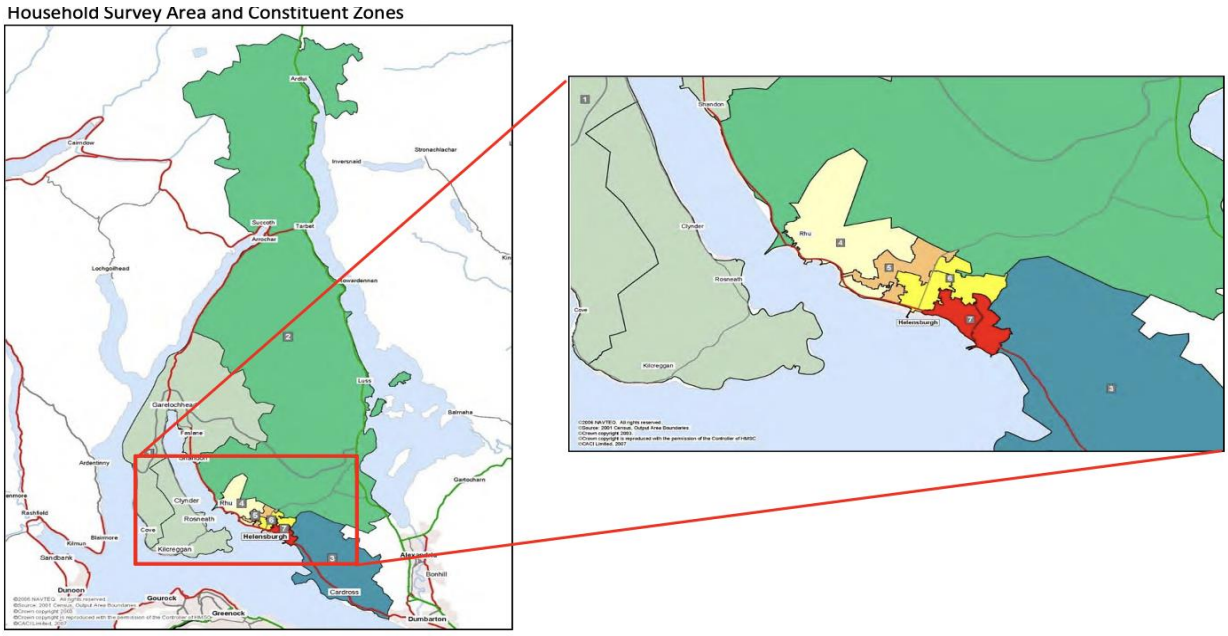
Table 12 - Comparison Goods Floorspace Need in Helensburgh in 2033

| Table 12 - Comparison Goods Floorspace Need<br>Helensburgh Town Centre<br>2033 | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Headroom Expenditure at 2033 | Forecast Turnover at 2028 of Commitments (£m) | Adjusted Headroom Expenditure at 2028 after commitments (£m) | Adjustment for Over / Under Trading at Base Year (£m) | Adjusted Residual Headroom Expenditure at 2033 (£m) | Assumed Average Sales density at 2033 (£/m$^2$ net) | Estimated Retail Floorspace Need in 2028 (m$^2$ net) | Estimated Retail Floorspace Need in 2028 (m$^2$ gross) |
| | A | B | C | D | E | F | G | H |
| | (1) | | C=A+B | (2) | E=C+D | (3) | G=E/F | H=G X 100/65 |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | 7.47 | 0.00 | 7.47 | 4.63 | 12.10 | 5,939 | 2,037 | 3,133 |
| **Total** | 7.47 | 0.00 | 7.47 | 4.63 | 12.10 | - | 2,037 | 3,133 |

Notes
(1) From Table 11.
(2) From Table 5.
(3) Based Refer to Section 3 of Written Statement.

# APPENDIX 3

## Convenience Retail Floorspace Need Assessment




# Scenario 1: Market Share

Table 1 - Population Change by Zone

| Table 1 – Catchment Population Change by Zone | | | | | | | |
|---|---|---|---|---|---|---|---|
| **Zone** | **Area** | **2011 Population (1)** | **2023 Population Projection (2)** | **2028 Projected Population (2)** | **2033 Projected Population (2)** | **Population Change %** | |
| | | | | | | **2011 - 2023** | **2023 - 2033** |
| 1 | Cove | 6,742 | 5,074 | 4,885 | 4,708 | -1,668 | -366 |
| 2 | Arrochar | 2,183 | 1,722 | 1,611 | 1,561 | -461 | -161 |
| 3 | Cardross | 2,191 | 2,275 | 2,268 | 2,209 | 84 | -66 |
| 4 | Rhu | 2,273 | 2,219 | 2,112 | 2,046 | -54 | -173 |
| 5 | Helensburgh West | 2,918 | 2,574 | 2,512 | 2,442 | -344 | -132 |
| 6 | Helensburgh Central | 5,034 | 4,749 | 4,559 | 4,378 | -285 | -371 |
| 7 | Helensburgh East | 4,576 | 4,676 | 4,514 | 4,358 | 100 | -318 |
| **Total** | | **25,917** | **23,289** | **22,461** | **21,702** | **-2,628** | **-1,587** |

Notes
(1) Population figures for 2011 from 2011 Helensburgh Retail Update 2011.
(2) Population figures for the Catchment Area and individual Zones for 2023, 2028 and 2033 provided by Experian.

Table 2 – Total Available Expenditure on Convenience Goods by Zone

| Table 2 – Total Available Expenditure on Convenience Goods by Zone (Excluding Expenditure by Special Forms of Trading) | | | | |
|---|---|---|---|---|
| | Total Expenditure per Zone (£m) [1] | | | Total Increase 2023 – 2033 £m |
| Zone | 2023 | 2028 | 2033 | |
| 1 | 16.85 | 15.42 | 14.39 | |
| 2 | 6.33 | 5.64 | 5.29 | |
| 3 | 7.86 | 7.45 | 7.03 | |
| 4 | 7.84 | 7.10 | 6.66 | |
| 5 | 8.77 | 8.14 | 7.66 | |
| 6 | 14.94 | 13.64 | 12.68 | |
| 7 | 13.94 | 12.80 | 11.97 | |
| **Total** | **76.53** | **70.19** | **65.68** | **-10.85** |

Notes:

(1) Expenditure Per Zone were derived from information on Expenditure per head figures gained from Experian for the Catchment Area Zones for 2023 at 2021 prices. Refer to Written Statement for detail on growth rates and allowance for special forms of trading.

Table 3 – Estimated Convenience Goods Centre Market Share by Zone in 2023

| Table 3 – Estimated Convenience Goods Centre Market Share by Zone 2023 (Base Year) (%) | | | | | | | |
|---|---|---|---|---|---|---|---|
| | **Consumer Demand: Where the Money Comes From (Zone) (1)** | | | | | | |
| **Retail Supply: Where the Money Is Spent** | **Zone 1** | **Zone 2** | **Zone 3** | **Zone 4** | **Zone 5** | **Zone 6** | **Zone 7** |
| **Within the Catchment Area** | | | | | | | |
| Helensburgh Town Centre | 35 | 35 | 35 | 35 | 35 | 35 | 35 |
| All other locations / centres (Morrisons & other) | *35* | *35* | *35* | *35* | *35* | *35* | *35* |
| ***Sub-Total*** | *70* | *70* | *70* | *70* | *70* | *70* | *70* |
| **Outside Catchment Area** | | | | | | | |
| Alexandria | | | | | | | |
| Braehead Shopping Centre, Renfrew | | | | | | | |
| Clydebank | | | | | | | |
| Dumbarton | | | | | | | |
| Glasgow | | | | | | | |
| Renfrew | | | | | | | |
| Other local Centres / stores | | | | | | | |
| *Sub-Total* | *30* | *30* | *30* | *30* | *30* | *30* | *30* |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

Notes
(1) Refer to Section 4 of Written Statement.

Table 4 – Estimated Convenience Goods Expenditure Pattern and Centre Turnover in 2023

| Table 4 – Estimated Convenience Goods Expenditure Pattern and Centre Turnover 2023 (Base Year) (£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Catch Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [2] | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 5.90 | 2.22 | 2.75 | 2.74 | 3.07 | 5.23 | 4.88 | 26.79 | 2.68 | 29.47 |
| All other locations / centres | 5.90 | 2.22 | 2.75 | 2.74 | 3.07 | 5.23 | 4.88 | 26.79 | | |
| *Sub-Total* | *11.80* | *4.44* | *5.5* | *5.48* | *6.14* | *10.46* | *9.76* | *53.58* | | |
| **Outside Catchment Area** | | | | | | | | | | |
| *Sub-Total* | *5.05* | *1.89* | *2.36* | *2.36* | *2.63* | *4.48* | *4.18* | *22.96* | | |
| **Total [3]** | **16.85** | **6.33** | **7.86** | **7.84** | **8.77** | **14.94** | **13.94** | **76.53** | | |

Notes:
(1) From Table 3.
(2) Refer to Section 3 of Written Statement.
(3) From Table 2.

## Table 5 - Estimated Convenience Goods Expenditure Pattern and Centre Turnover Estimates at 2023

**Table 5 - Estimated Convenience Goods Expenditure Pattern and Centre Turnover Estimates at the Base Year**
**Helensburgh Town Centre**
**2023**

**(£m)**

| Retail Supply: Where the Money Is Spent | Total Expenditure Drawn from Survey Area (1) | Estimated Inflow Expenditure (1) | Total Convenience Goods Turnover Potential | Convenience Goods Floorspace ($m^2$ net) (2) | Average Sales Density (£/$m^2$ net) (2) | Benchmark Average Sales Density (£/$m^2$ net) (32 | Benchmark Convenience Goods Turnover (£m) | Extent of Any Over/Under Trading (£m) |
|---|---|---|---|---|---|---|---|---|
| | A | B | C=A+B | D | E=C/D | F | G=FXD | H |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | 26.79 | 2.68 | 29.47 | 2,815 | 10,468 | 10,350 | 29.14 | 0.33 |
| All other locations / centres | 26.79 | | | | | | | |
| *Sub-Total* | *53.58* | | | | | | | |
| **Outside Catchment Area** | | | | | | | | |
| *Sub-Total* | *22.96* | | | | | | | |
| **Total** | **76.53** | | | | | | | |

Notes
(1) From Table 4.
(2) Refer to Section 3 of Written Statement.

Table 6 - Convenience Goods Expenditure Pattern and Centre Turnover Estimates in 2028

| **Table 6 - Convenience Goods Expenditure Pattern and Centre Turnover Estimates 2028 (£m)** | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Catchment Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [3] | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 5.40 | 1.97 | 2.61 | 2.49 | 2.85 | 4.77 | 4.48 | 24.57 | 2.46 | 27.03 |
| All other locations / centres | 5.40 | 1.97 | 2.61 | 2.49 | 2.85 | 4.77 | 4.48 | 24.57 | | |
| *Sub-Total* | *10.80* | *3.94* | *4.48* | *5.22* | *5.70* | *9.54* | *9.60* | *49.14* | | |
| Outside Catchment Area | | | | | | | | | | |
| *Sub-Total* | *4.62* | *1.70* | *2.97* | *1.88* | *2.44* | *4.10* | *3.20* | *21.05* | | |
| **Total [2]** | **15.42** | **5.64** | **7.45** | **7.10** | **8.14** | **13.64** | **12.80** | **70.19** | | |

Notes
(1) From Table 3
(2) From Table 2
(3) Refer to Section 3 of Written Statement.

Table 7 - Calculation of Potential Convenience Goods Headroom Expenditure in 2028

| Table 7 - Calculation of Potential Convenience Goods Headroom Expenditure<br>Helensburgh Town Centre<br>2028<br>(£m) | | | | | |
|---|---|---|---|---|---|
| Centre | 2023 Turnover (Base Year) | 2028 Turnover Potential | Turnover Allocation for Existing Retailing 2023-2028 | Residual Turnover Potential at 2033 | Headroom Expenditure at 2033 |
| | A | B | C | D | E |
| | (1) | (2) | | D=B-C | E=D-A |
| **Within Catchment Area** | | | | | |
| Helensburgh Town centre | 29.47 | 27.03 | 0.89 | 26.14 | -3.33 |
| **Total** | **29.47** | **27.03** | **0.89** | **26.14** | **-3.33** |

Notes
(1) From Table 5.
(2) From Table 6.

Table 8 – Quantitative Retail Floorspace Need in 2028

| Table 8 – Quantitative Retail Floorspace Need<br>Helensburgh Town Centre<br>2028 | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Centre | Headroom Expenditure at 2028 Before Commitments (£m) | Forecast Turnover at 2028 of Commitments (£m) | Headroom Expenditure at 2028 After Commitments (£m) | Adjustment for Over/Under Trading at the Base Year (£m) | Residual Headroom Expenditure at 2028 (£m) | Assumed Average Sales Density at 2028 (£ Per Sq M Net) (2) | Estimated Retail Floorspace Need (Sq M Net) | Estimated Retail Floorspace Need (Sq M Gross) |
| | A (1) | B | C=A-B | D (2) | E=C+D | F (2) | G=E/F | H=Gx100/65 |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | -3.33 | 0.0 | -3.33 | 0.33 | -3.00 | 10.666 | -281 | -432 |
| **Total** | **-3.33** | **0.0** | **-3.33** | **0.33** | **-3.00** | **10.666** | **-281** | **-432** |

Notes:
(1) From Table 7.
(2) Refer to Section 3 of Written Statement.

Table 9 - Convenience Goods Expenditure Pattern and Centre Turnover Estimates in 2033

| Table 9 - Convenience Goods Expenditure Pattern and Centre Turnover Estimates 2033 (£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Study Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [3] | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 5.04 | 1.85 | 2.46 | 2.33 | 2.68 | 4.44 | 4.20 | 23.00 | 2.30 | 25.30 |
| All other locations / centres | 5.04 | 1.85 | 2.46 | 2.33 | 2.68 | 4.44 | 4.20 | 23.00 | | |
| *Sub-Total* | *10.08* | *3.70* | *4.92* | *4.66* | *5.36* | *8.88* | *8.40* | *46.00* | | |
| Outside Catchment Area | | | | | | | | | | |
| *Sub-Total* | *4.31* | *1.59* | *2.11* | *2.00* | *2.30* | *3.80* | *3.57* | *19.68* | | |
| **Total** [2] | **14.39** | **5.29** | **7.03** | **6.66** | **7.66** | **12.68** | **11.97** | **65.68** | | |

Notes
(1) From Table 3
(2) From Table 2
(3) Refer to Section 3 of Written Statement.

Table 10 - Calculation of Potential Convenience Goods Headroom Expenditure in 2033

| Table 10- Calculation of Potential Convenience Goods Headroom Expenditure<br>Helensburgh Town Centre<br>2033<br>(£m) | | | | | |
|---|---|---|---|---|---|
| Centre | 2023 Turnover (Base Year) | 2033 Turnover Potential | Turnover Allocation for Existing Retailing 2023-2033 | Residual Turnover Potential at 2033 | Headroom Expenditure at 2033 |
| | A | B | C | D | E |
| | (1) | (2) | | D=B-C | E=D-A |
| **Within Catchment Area** | | | | | |
| Helensburgh Town Centre | 29.47 | 25.30 | 0.82 | 24.48 | -4.99 |
| **Total** | **29.47** | **25.30** | **0.82** | **24.48** | **-4.99** |

Notes
(1) From Table 4.
(2) From Table 9.

Table 11 – Quantitative Retail Floorspace Need in 2033

| Table 11 – Quantitative Retail Floorspace Need<br>Helensburgh Town Centre<br>2033 | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Centre | Headroom Expenditure at 2033 Before Commitments (£m) | Forecast Turnover at 2033 of Commitments (£m) | Headroom Expenditure at 2033 After Commitments (£m) | Adjustment for Over/Under Trading at the Base Year (£m) | Residual Headroom Expenditure at 2033 (£m) | Assumed Average Sales Density at 203 (£ Per Sqm Net) | Estimated Retail Floorspace Need (Sqm Net) | Estimated Retail Floorspace Need (Sqm Gross) |
| | A (1) | B | C=A-B | D (2) | E=C+D | F (3) | G=E/F | H=Gx100/65 |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | -4.99 | 0.0 | -4.99 | 0.33 | -4.66 | 10,642 | -437 | -672 |
| **Total** | **-4.99** | **0.0** | **-4.99** | **0.33** | **-4.66** | **10,642** | **-437** | **-672** |

Notes
(1) From Table 10.
(2) From Table 5.
(3) Refer to Section 3 of Written Statement.

# Scenario 2 - Market Shares Adjusted Upwards

Table 1 – Catchment Area Population

| Table 1 – Catchment Area Population | | | | | | | |
|---|---|---|---|---|---|---|---|
| Zone | Area | 2011 Population (1) | 2023 Population Projection (2) | 2028 Projected Population | 2033 Projected Population | Population Change % | |
| | | | | | | 2011 - 2023 | 2023 - 2033 |
| 1 | Cove | 6,742 | 5,074 | 4,885 | 4,708 | -1,668 | -366 |
| 2 | Arrochar | 2,183 | 1,722 | 1,611 | 1,561 | -461 | -161 |
| 3 | Cardross | 2,191 | 2,275 | 2,268 | 2,209 | 84 | -66 |
| 4 | Rhu | 2,273 | 2,219 | 2,112 | 2,046 | -54 | -173 |
| 5 | Helensburgh West | 2,918 | 2,574 | 2,512 | 2,442 | -344 | -132 |
| 6 | Helensburgh Central | 5,034 | 4,749 | 4,559 | 4,378 | -285 | -371 |
| 7 | Helensburgh East | 4,576 | 4,676 | 4,514 | 4,358 | 100 | -318 |
| Total | | 25,917 | 23,289 | 22,461 | 21,702 | -2,628 | -1,587 |

Notes
(1) Population from 2011 Retail Update
(2) Population information for Catchment Area and individual zones provided by Experian.

Table 2 – Total Available Expenditure on Convenience Goods by Zone

| Table 2 – Total Available Expenditure on Convenience Goods by Zone (Excluding Expenditure by Special Forms of Trading) | | | | |
|---|---|---|---|---|
| | Total Expenditure per Zone (£m) | | | **Total Increase 2023 – 2033 £m** |
| **Zone** | **2023**(1) | **2028** (2) | **2033** (2) | |
| **1** | 16.85 | 15.42 | 14.39 | |
| **2** | 6.33 | 5.64 | 5.29 | |
| **3** | 7.86 | 7.45 | 7.03 | |
| **4** | 7.84 | 7.10 | 6.66 | |
| **5** | 8.77 | 8.14 | 7.66 | |
| **6** | 14.94 | 13.64 | 12.68 | |
| **7** | 13.94 | 12.80 | 11.97 | |
| **Total** | **76.53** | **70.19** | **65.68** | **-10.85** |

Notes

(1) Expenditure Per Zone were derived from information on Expenditure per head figures gained from Experian for the Catchment Area Zones for 2023 at 2021 prices. Refer to Written Statement for detail on growth rates and allowance for special forms of trading.

Table 3 – Estimated Convenience Goods Centre Market Share by Zone in 2023

| Table 3 – Estimated Convenience Goods Centre Market Share by Zone 2023 (Base Year) (%) | | | | | | | |
|---|---|---|---|---|---|---|---|
| | **Consumer Demand: Where the Money Comes From (Zone)** [1] | | | | | | |
| **Retail Supply: Where the Money Is Spent** | **Zone 1** | **Zone 2** | **Zone 3** | **Zone 4** | **Zone 5** | **Zone 6** | **Zone 7** |
| **Within the Catchment Area** | | | | | | | |
| Helensburgh Town Centre | 35 | 35 | 35 | 35 | 35 | 35 | 35 |
| All other locations / centres (Morrisons & other) | *35* | *35* | *35* | *35* | *35* | *35* | *35* |
| *Sub-Total* | *70* | *70* | *70* | *70* | *70* | *70* | *70* |
| **Outside Catchment Area** | | | | | | | |
| Alexandria | | | | | | | |
| Braehead Shopping Centre, Renfrew | | | | | | | |
| Clydebank | | | | | | | |
| Dumbarton | | | | | | | |
| Glasgow | | | | | | | |
| Renfrew | | | | | | | |
| Other local Centres / stores | | | | | | | |
| *Sub-Total* | *30* | *30* | *30* | *30* | *30* | *30* | *30* |
| **Total** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

Notes
(1) Refer to Section 4 of Written Statement

Table 4 – Estimated Convenience Goods Expenditure Pattern and Centre Turnover at 2023

| Table 4 – Estimated Convenience Goods Expenditure Pattern and Centre Turnover 2023 (Base Year) (£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Catch Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [2] | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 5.90 | 2.22 | 2.75 | 2.74 | 3.07 | 5.23 | 4.88 | 26.79 | 2.68 | 29.47 |
| All other locations / centres | 5.90 | 2.22 | 2.75 | 2.74 | 3.07 | 5.23 | 4.88 | 26.79 | | |
| *Sub-Total* | *11.80* | *4.44* | *5.5* | *5.48* | *6.14* | *10.46* | *9.76* | *53.58* | | |
| **Outside Catchment Area** | | | | | | | | | | |
| *Sub-Total* | *5.05* | *1.89* | *2.36* | *2.36* | *2.63* | *4.48* | *4.18* | *22.96* | | |
| **Total [3]** | **16.85** | **6.33** | **7.86** | **7.84** | **8.77** | **14.94** | **13.94** | **76.53** | | |

Notes
(1) From Table 3
(2) From Table 2
(3) Refer to Section 4 of Written Statement.

Table 5 - Estimated Convenience Goods Expenditure Pattern and Centre Turnover Estimates at 2023

| Table 5 - Estimated Convenience Goods Expenditure Pattern and Centre Turnover Estimates at the Base Year<br>Helensburgh Town Centre<br>2023<br><br>(£m) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Total Expenditure Drawn from Survey Area (1) | Estimated Inflow Expenditure (1) | Total Convenience Goods Turnover Potential | Convenience Goods Floorspace ($m^2$ net) (2) | Average Sales Density (£/$m^2$ net) (2) | Benchmark Average Sales Density (£/$m^2$ net) (2) | Benchmark Convenience Goods Turnover (£m) | Extent of Any Over/Under Trading (£m) |
| | A | B | C=A+B | D | E=C/D | F | G=FXD | H |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | 26.79 | 2.68 | 29.47 | 2,815 | 10,468 | 10,350 | 29.14 | 0.33 |
| All other locations / centres | 26.79 | | | | | | | |
| *Sub-Total* | *53.58* | | | | | | | |
| **Outside Catchment Area** | | | | | | | | |
| *Sub-Total* | *22.96* | | | | | | | |
| Total | 76.53 | | | | | | | |

Notes
(1) From Table 4
(2) Refer to Section 3 of Written Statement.

Table 6 – Estimated Adjusted Convenience Goods Centre Market Share by Zone in 2028

| Table 6 – Estimated Adjusted Convenience Goods Centre Market Share by Zone 2028 (%) | | | | | | | |
|---|---|---|---|---|---|---|---|
| | **Consumer Demand: Where the Money Comes From (Zone) (1)** | | | | | | |
| **Retail Supply: Where the Money Is Spent** | **Zone 1** | **Zone 2** | **Zone 3** | **Zone 4** | **Zone 5** | **Zone 6** | **Zone 7** |
| **Within Catchment Area** | | | | | | | |
| Helensburgh Town Centre | 60 | 60 | 60 | 60 | 60 | 60 | 60 |
| All other locations / centres (Morrisons & other) | *30* | *30* | *30* | *30* | *30* | *30* | *30* |
| *Sub-Total* | *90* | *90* | *90* | *90* | *90* | *90* | *90* |
| **Outside Catchment Area** | | | | | | | |
| Alexandria | | | | | | | |
| Braehead Shopping Centre, Renfrew | | | | | | | |
| Clydebank | | | | | | | |
| Dumbarton | | | | | | | |
| Glasgow | | | | | | | |
| Renfrew | | | | | | | |
| Other local centres / areas | | | | | | | |
| *Sub-Total* | *10* | *10* | *10* | *10* | *10* | *10* | *10* |
| Total | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

Notes
(1) Refer to Section 4 of Written Statement

Table 7 – Estimated Adjusted Convenience Goods Centre Market Share by Zone in 2028

| Table 7 - All Convenience Goods Expenditure Pattern and Centre Turnover Estimates 2028 (£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Catchment Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [3] | C=A+B |
| **Within Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 9.25 | 3.38 | 4.47 | 4.26 | 4.88 | 8.18 | 7.68 | 42.10 | 4.21 | 46.31 |
| All other locations / centres | 4.63 | 1.69 | 2.24 | 2.13 | 2.44 | 4.09 | 3.84 | 21.06 | | |
| *Sub-Total* | *13.88* | *5.07* | *6.71* | *6.39* | *7.32* | *12.27* | *11.52* | *63.16* | | |
| Outside Catchment Area | | | | | | | | | | |
| *Sub-Total* | *1,54* | *0.57* | 0.74 | *0.71* | *0.82* | *1.37* | *1.28* | *7.03* | | |
| **Total [2]** | **15.42** | **5.64** | **7.45** | **7.10** | **8.14** | **13.64** | **12.80** | **70.19** | | |

Notes
(1) From Table 6
(2) From Table 2
(3) Refer to Section 3 of Written Statement.

Table 8- Calculation of Potential Convenience Goods Headroom Expenditure in 2028

| Table 8- Calculation of Potential Convenience Goods Headroom Expenditure<br>Helensburgh Town Centre<br>2028<br>(£m) | | | | | |
|---|---|---|---|---|---|
| Centre | 2023 Turnover (Base Year) | 2028 Turnover Potential | Turnover Allocation for Existing Retailing 2023-2028 | Residual Turnover Potential at 2028 | Headroom Expenditure at 2028 |
| | A | B | C | D | E |
| | (1) | (2) | | D=B-C | E=D-A |
| **Within Catchment Area** | | | | | |
| Helensburgh Town Centre | 29.47 | 46.31 | 0.89 | 45.42 | 15.95 |
| **Total** | **29.47** | **46.31** | **0.89** | **45.42** | **15.95** |

Notes
(1) From Table 4.
(2) From Table 7.

Table 9- Convenience Goods Floorspace Need in Helensburgh Town Centre in 2028

| Table 9- Convenience Goods Floorspace Need in Helensburgh Town Centre 2028 | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Headroom Expenditure at 2028 | Forecast Turnover at 2028 of Commitments (£m) | Adjusted Headroom Expenditure at 2028 after commitments (£m) | Adjustment for Over / Under Trading at Base Year (£m) | Adjusted Residual Headroom Expenditure at 2028 (£m) | Assumed Average Sales density at 2028 (£/$m^2$ net) | Estimated Retail Floorspace Need in 2028 ($m^2$ net) | Estimated Retail Floorspace Need in 2028 ($m^2$ gross) |
| | A | B | C | D | E | F | G | H |
| | (1) | | C=A+B | (2) | E=C+D | (3) | G=E/F | H=G X 100/65 |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | 15.95 | 0.00 | 15.95 | 0.33 | 16.28 | 10,666 | 1,526 | 2,347 |
| **Total** | **15.95** | **0.00** | **15.95** | **0.33** | **16.28** | **10,666** | **1,526** | **2,347** |

Notes
(1) From Table 8
(2) From Table 5
(3) Refer to Section 3 of Written Statement.

Table 10 - All Convenience Goods Expenditure Pattern and Centre Turnover Estimates in 2033

| Table 10 - All Convenience Goods Expenditure Pattern and Centre Turnover Estimates 2033 (£m) | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Retail Supply: Where the Money Is Spent | Catchment Area [1] | | | | | | | Total Expenditure Drawn from Survey Area | Estimated Inflow Expenditure | Total Turnover |
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | A | B [3] | C=A+B |
| **Within the Catchment Area** | | | | | | | | | | |
| Helensburgh Town Centre | 8.63 | 3.17 | 4.22 | 4.00 | 4.60 | 7.61 | 7.18 | 39.41 | 3.94 | 43.35 |
| All other locations / centres | 4.32 | 1.59 | 2.11 | 2.00 | 2.30 | 3.80 | 3.59 | 19.71 | | |
| *Sub-Total* | *12.95* | *4.76* | *6.33* | *6.00* | *6.90* | *11.41* | *10.77* | *59.12* | | |
| Outside Catchment Area | | | | | | | | | | |
| *Sub-Total* | *1.44* | *0.53* | *0.70* | *0.66* | *0.76* | *1.27* | *1.20* | *6.56* | | |
| **Total [2]** | **14.39** | **5.29** | **7.03** | **6.66** | **7.66** | **12.68** | **11.97** | **65.68** | | |

Notes
(1) From Table 6.
(2) From Table 2.
(3) Refer to Section 3 of Written Statement.

Table 11 - Calculation of Potential Convenience Goods Headroom Expenditure in 2033

| Table 11 - Calculation of Potential Convenience Goods Headroom Expenditure<br>Helensburgh Town Centre<br>2033<br>(£m) | | | | | |
|---|---|---|---|---|---|
| Centre | 2023 Turnover (Base Year) | 2033 Turnover Potential | Turnover Allocation for Existing Retailing 2023-2033 | Residual Turnover Potential at 2033 | Headroom Expenditure at 2033 |
| | A | B | C | D | E |
| | (1) | (2) | | D=B-C | E=D-A |
| **Within Catchment Area** | | | | | |
| Helensburgh Town Centre | 29.47 | 43.35 | 0.82 | 42.53 | 13.06 |
| **Total** | **29.47** | **43.35** | **0.82** | **42.53** | **13.06** |

Notes
(1) From Table 4.
(2) From Table 10.

Table 12 - Convenience Goods Floorspace Need in Helensburgh Town Centre in 2033

| Table 12- Convenience Goods Floorspace Need in Helensburgh Town Centre 2033 (£m) | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Headroom Expenditure at 2033 | Forecast Turnover at 2033 of Commitments (£m) | Adjusted Headroom Expenditure at 2033 after commitments (£m) | Adjustment for Over / Under Trading at Base Year (£m) | Adjusted Residual Headroom Expenditure at 2033 (£m) | Assumed Average Sales density at 2033 (£/m² net) | Estimated Retail Floorspace Need in 2033 (m² net) | Estimated Retail Floorspace Need in 2033 (m² gross) |
| | A (1) | B | C C=A+B | D (2) | E E=C+D | F (3) | G G=E/F | H H=G X 100/65 |
| **Within Catchment Area** | | | | | | | | |
| Helensburgh Town Centre | 13.06 | 0.00 | 13.06 | 0.33 | 13.39 | 10,642 | 1,258 | 1,935 |
| **Total** | **13.06** | **0.00** | **13.06** | **0.33** | **13.39** | **10,642** | **1,258** | **1,935** |

Notes
(1) From Table 11.
(2) From Table 5.
(3) Refer to Section 3 of Written Statement.

Colliers

Accelerating success.