



# West Lothian Retail Capacity Study

**Main Report**

On behalf of **West Lothian Council**

Project Ref: 332612309 | Rev: - | Date: March 2025

---

Registered Office: Stantec House Kelburn Court, Birchwood, Warrington, England, WA3 6UT  
Office Address: 100 Barbirolli Square, Manchester M2 3PW  
T: +44 (0)161 245 8900 E: [manchester.uk@stantec.com](mailto:manchester.uk@stantec.com)

## Document Control Sheet

**Project Name:** West Lothian Retail Capacity Study

**Project Ref:** 332612309

**Report Title:** Main Report

**Date:** March 2025

|  | <b>Name</b>   | <b>Position</b> | <b>Signature</b> | <b>Date</b> |
|--|---------------|-----------------|------------------|-------------|
| <b>Prepared by:</b>                            | Megan Beattie | Planner         | M Beattie        | March 2025  |
| <b>Reviewed by:</b>                            | Bernard Greep | Director        | B Greep          | March 2025  |
| <b>Approved by:</b>                            | Bernard Greep | Director        | B Greep          | March 2025  |
| <b>For and on behalf of Stantec UK Limited</b> |               |                 |                  |             |

| <b>Revision</b> | <b>Date</b> | <b>Description</b> | <b>Prepared</b> | <b>Reviewed</b> | <b>Approved</b> |
|-----------------|-------------|--------------------|-----------------|-----------------|-----------------|
|                 |             |                    |                 |                 |                 |
|                 |             |                    |                 |                 |                 |

This report has been prepared by Stantec UK Limited ('Stantec') on behalf of its client to whom this report is addressed ('Client') in connection with the project described in this report and takes into account the Client's particular instructions and requirements. This report was prepared in accordance with the professional services appointment under which Stantec was appointed by its Client. This report is not intended for and should not be relied on by any third party (i.e. parties other than the Client). Stantec accepts no duty or responsibility (including in negligence) to any party other than the Client and disclaims all liability of any nature whatsoever to any such party in respect of this report.

## Contents

|          |   |           |
|----------|---|-----------|
| <b>1</b> | <b>Introduction.....</b>                                      | <b>1</b>  |
| 1.1      | Purpose of the Study .....                                    | 1         |
| 1.2      | Structure of the Report .....                                 | 1         |
| <b>2</b> | <b>National and Local Planning Policy Context .....</b>       | <b>3</b>  |
| 2.1      | National Planning Policy.....                                 | 3         |
| 2.2      | Local Planning Policy .....                                   | 4         |
| <b>3</b> | <b>Market and Economic Trends .....</b>                       | <b>5</b>  |
| 3.1      | Market Trends .....   | 5         |
| 3.2      | Convenience Retail Sector.....                                | 9         |
| 3.3      | Comparison Retail Sector .....                                | 11        |
| 3.4      | Commercial Leisure.....                                       | 12        |
| 3.5      | Impacts of COVID-19 .....                                     | 14        |
| 3.6      | Potential Economic Scenarios.....                             | 14        |
| <b>4</b> | <b>Performance Analyses.....</b>                              | <b>17</b> |
| 4.1      | Introduction .....  | 17        |
| 4.2      | Performance of Livingston Town Centre .....                   | 18        |
| 4.3      | Performance of Armadale Town Centre.....                      | 26        |
| 4.4      | Performance of Bathgate Town Centre .....                     | 29        |
| 4.5      | Performance of Broxburn/Uphall Town Centre .....              | 33        |
| 4.6      | Performance of Linlithgow Town Centre .....                   | 39        |
| 4.7      | Performance of Whitburn Town Centre.....                      | 45        |
| <b>5</b> | <b>Current Retail Expenditure Patterns .....</b>              | <b>49</b> |
| 5.1      | Introduction .....  | 49        |
| 5.2      | Household Survey Methodology .....                            | 49        |
| 5.3      | Study Area .....  | 49        |
| 5.4      | Composite Patterns of Comparison Retail Goods Spending .....  | 51        |
| 5.5      | Composite Patterns of Convenience Retail Goods Spending ..... | 54        |
| <b>6</b> | <b>Assessment of Retail Needs .....</b>                       | <b>58</b> |
| 6.1      | Introduction .....  | 58        |
| 6.2      | Quantitative Assessment.....                                  | 58        |
| <b>7</b> | <b>Summary of Findings, and Recommendations .....</b>         | <b>65</b> |
| 7.1      | Introduction .....  | 65        |
| 7.2      | The Performance of West Lothian's Centres .....               | 65        |
| 7.3      | Recommendations.....  | 66        |
| 7.4      | Retail Needs arising over the Study Period .....              | 66        |
| 7.5      | Monitoring and Review .....                                   | 67        |

## Figures

|  |    |
|--|----|
| Figure 3-1: Actual and projected market share of non-store retail sales/SFT (adjusted for SFT sales from stores) ..... | 9  |
| Figure 3-2: UK Grocery Market Share (January 2025) .....   | 10 |
| Figure 3-3: UK Grocery Market Share (January 2023) .....   | 10 |
| Figure 4-1 Adopted town centre boundary (right, outlined in blue) and Experian Goad's survey area (right) .....        | 18 |
| Figure 4-2 West Lothian Retail Capacity Study (November 2018): town centre assessment indicators .....                 | 19 |
| Figure 4-3 Chain restaurants at The Elements .....   | 22 |
| Figure 4-4 Inside The Centre Livingston .....  | 23 |
| Figure 4-5 Multi-storey car park serving The Centre Livingston .....   | 24 |
| Figure 4-6 Livingston Bus Terminal .....   | 25 |
| Figure 4-7 Armadale's town centre environment .....  | 28 |
| Figure 4-8 The Goth (right) .....  | 28 |
| Figure 4-9 Vacant units along Hopetoun Street .....  | 31 |
| Figure 4-10 George Street (top left and right and bottom right) and George Place (bottom left) .....                   | 32 |
| Figure 4-11 North Bridge Street / Hopetoun Street (left) and Whitburn Road (right) .....                               | 33 |
| Figure 4-12 Argyle Court .....   | 34 |
| Figure 4-13 Broxburn's town centre environment .....   | 38 |
| Figure 4-14 Heavily congested A899 .....   | 39 |
| Figure 4-15 Regent Centre, eastern end of Linlithgow .....   | 40 |
| Figure 4-16 Linlithgow's town centre environment, The Cross (top right) and The Vennel (bottom left and right) .....   | 43 |
| Figure 4-17 Linlithgow Loch and Linlithgow Palace .....  | 43 |
| Figure 4-18 Various historic buildings in Linlithgow .....   | 44 |
| Figure 4-19 Whitburn's town centre environment .....   | 47 |
| Figure 4-20 General streetscape .....  | 47 |
| Figure 5-1 Study Area .....  | 50 |

## Tables

|   |    |
|---|----|
| Table 3-1: Net change in GB retail units occupied by multiples and chains by year 2015-2023 plus data for H1 2024 ..... | 7  |
| Table 3-2: Average Weekly Household Spending Data 2009-2023 .....   | 13 |
| Table 4-1 Diversity of Uses, Livingston Town Centre (January 2025) .....  | 20 |
| Table 4-2 Diversity of Uses, Armadale Town Centre (January 2025) .....  | 26 |
| Table 4-3 Diversity of Uses, Bathgate Town Centre (January 2025) .....  | 30 |
| Table 4-4 Diversity of Uses, Broxburn Town Centre (January 2025) .....  | 35 |
| Table 4-5 Diversity of Uses, Uphall Town Centre (January 2025) .....  | 36 |
| Table 4-6 Diversity of Uses, Linlithgow Town Centre (January 2025) .....  | 41 |
| Table 4-7 Diversity of Uses, Whitburn Town Centre (January 2025) .....  | 45 |
| Table 5-1 Composite Patterns of Comparison Goods Spend .....  | 51 |
| Table 5-2 Comparison Goods Expenditure Retained Within the Study Area in 2025 .....                                     | 52 |
| Table 5-3 Main Destinations for Comparison Goods Expenditure Leakage in 2025 .....                                      | 53 |
| Table 5-4 Broad Destinations for Convenience Goods Expenditure .....  | 54 |
| Table 5-5 Main Destinations for Convenience Goods Expenditure Retained within the Study Area in 2024 .....              | 55 |
| Table 5-6 Main Destinations for Convenience Goods Expenditure Leakage .....   | 55 |
| Table 5-7 Localised Convenience Goods Retention Rates .....   | 55 |
| Table 5-8 Convenience Goods Stores with Zonal Market Shares over 5 Per Cent .....                                       | 56 |

Table 6-1 Summary of Population Growth ..... 58  
Table 6-2 Convenience Goods Expenditure Growth Summary ..... 59  
Table 6-3 Comparison Goods Expenditure Growth Summary ..... 59  
Table 6-4 Summary of Retail Expenditure Retention in the Study Area at 2025 (excl. SFT) ..... 60  
Table 6-5 Retail Commitments ..... 60  
Table 6-6 Methodology for Convenience Retail Assessment ..... 61  
Table 6-7 Summary of Convenience Retail Floorspace Requirements ..... 62  
Table 6-8 Methodology for Comparison Retail Assessment ..... 62  
Table 6-9 Summary of Comparison Retail Floorspace Requirements ..... 63

**Separately Bound Appendices Volume**

Appendix A Goad Survey Data  
Appendix B Study Area Plan  
Appendix C Household Survey Questionnaire  
Appendix D Comparison Retail Capacity Spreadsheets  
Appendix E Convenience Retail Capacity Spreadsheets

This page is intentionally blank

# 1 Introduction

## 1.1 Purpose of the Study

1.1.1 Stantec UK Ltd<sup>1</sup> is commissioned by West Lothian Council to undertake the West Lothian Retail Capacity Study on its behalf. The purpose of this report is to advise the Council on the capacity for additional retail development over the study period (2025 to 2043). Our quantitative assessment of retail needs is informed by a new telephone survey of 850 households to establish current retail expenditure patterns. We also provide our qualitative assessment of retail needs, informed by our visits to the sub-regional centre of Livingston (hereafter referred to as 'Livingston' or 'Livingston Town Centre') as well as the five traditional town centres of Armadale, Bathgate, Broxburn/Uphall, Linlithgow and Whitburn.

1.1.2 In accordance with the Council's brief, this report contains:

- a review of national and local planning policies;
- an overview of national trends in the retail and town centre market;
- health checks (which we refer to as 'performance analyses') of Livingston as well as the five traditional town centres of Armadale, Bathgate, Broxburn/Uphall, Linlithgow and Whitburn;
- an overview of shopping expenditure patterns based on up-to-date survey data, which establishes current market shares for defined centres and other destinations;
- a quantitative assessment of retail floorspace requirements in both the convenience and comparison goods retail sectors up to 2043, taking into account the latest population and expenditure data, and the effects of multi-channel retailing (the most significant of which is online shopping);
- a qualitative assessment of retail needs, informed by our visits to West Lothian's centres; and
- policy recommendations in respect of the long-term vitality and viability of centres within West Lothian's network of centres.

## 1.2 Structure of the Report

1.2.1 The remainder of our report is structured as follows:

- Section 2 sets out the national and local planning policy context;
- Section 3 summarises key market and economic trends of relevance to planning for town centres;
- Section 4 provides our health check assessments of Livingston as well as the five traditional town centres of Armadale, Bathgate, Broxburn/Uphall, Linlithgow and Whitburn;
- Section 5 summarises current patterns of retail spending by study area residents, based on the household telephone survey;

---

<sup>1</sup> Hereafter referred to as 'Stantec'

- Section 6 contains our assessment of quantitative and qualitative requirements for additional retail floorspace; and
- Section 7 provides a summary of our findings and recommendations.

## 2 National and Local Planning Policy Context

### 2.1 National Planning Policy

#### National Planning Framework 4

- 2.1.1 National Planning Framework 4 ('NPF4') forms the national spatial strategy for Scotland. NPF4 was published in February 2023 and it sets out the country's spatial principles, regional priorities, national developments and planning policy.
- 2.1.2 'Part 1 – A National Spatial Strategy for Scotland 2045' outlines six overarching spatial principles that will inform the future planning of Scotland's places. Below, we summarise those spatial principles which are most relevant to this study, namely:
- **Conserving and recycling assets** – making productive use of existing buildings, places, infrastructure and services
  - **Local living** – supporting local liveability by ensuring people can easily access services, greenspace, learning, work and leisure locally
  - **Compact urban growth** – limiting urban expansion to optimise the use of land to provide services and resources
  - **Rebalanced development** – targeting development to create opportunities for communities and investment in areas of past decline, and manage development sustainably in areas of high demand
- 2.1.3 By applying the six overarching spatial principles, NPF4 will support the planning and delivery of sustainable, liveable and productive places. Liveable places include those that support local living, where homes are well served by local facilities and services. In more urban areas, the concept of 20-minute neighbourhoods will help to support this. In terms of creating productive places, the Town Centre Action Plan Review sets a new vision for town centres and reaffirms the commitment to the Town Centre First principle. The Review recognises the importance of planning to diversify the offer within city and town centres to help them thrive and make them more resilient and better at anticipating future changes.
- 2.1.4 NPF4 seeks to encourage, promote and facilitate development in city and town centres by applying the Town Centre First approach and encouraging town centre living. In doing so, NPF4 seeks to create centres which are vibrant, healthy and resilient places for people to live, learn, work, enjoy and visit. NPF4 notes that development will be directed to the most sustainable locations that are accessible by a range of sustainable transport modes and provide communities with easy access to the goods, services and recreational opportunities they need. Local Development Plans ('LDPs') should identify a network of centres that reflect the principles of 20-minute neighbourhoods, accommodating a proportion of local housing requirements and proactively identifying opportunities to support residential development. Policy 27 supports proposals that increase the mix of uses in city, town and local centres.
- 2.1.5 In terms of retail specifically, NPF4 seeks to direct retail investment to the most sustainable locations that are most accessible by a range of sustainable transport modes. LDPs should consider where there may be a need for further retail provision, which may be:
- where a retail study identifies deficiencies in retail provision in terms of quality and quantity in an area; or
  - when allocating sites for housing or the creation of new communities, in terms of the need for neighbourhood shopping, and supporting local living.

## 2.2 Local Planning Policy

### West Lothian Local Development Plan 2018

- 2.2.1 West Lothian is strategically located within the central belt of Scotland and is well-served by both road and rail links. Its central location and strong business and labour market connections make it an important economic hub. Moreover, 60 per cent of Scotland's population live within one hour of West Lothian, making it highly accessible for customers and suppliers alike.
- 2.2.2 One of the key aims of the LDP relates to town centres and retailing. The LDP seeks to promote the development and regeneration of town and village centres, and to consolidate and enhance Livingston's role as a sub-regional retail and commercial centre.
- 2.2.3 At the top of West Lothian's retail hierarchy sits the sub-regional centre of Livingston, which caters for a broad range of shopping needs via a cluster of shopping centres and retail parks. Below the sub-regional centre of Livingston sit the five traditional town centres of Armadale, Bathgate, Broxburn/Uphall, Linlithgow and Whitburn, which serve more localised needs. The third tier of West Lothian's retail hierarchy comprises local town centres, local neighbourhood centres and town centres associated with new development (such as Winchburgh). At the bottom of the retail hierarchy lies the commercial centre of Linlithgow Bridge Retail Park.
- 2.2.4 The various centres are described as follows within the LDP:
- *'Sub-regional centre: Serves council-wide catchment and beyond as sub-regional centre to the Lothians in terms of comparison and convenience shopping. Major visitor destination and includes the Civic Centre. Provides an extensive range of shops, services, leisure activities and community facilities. Contains West Lothian's main bus interchange;*
  - *Traditional town centres: Serve the larger towns in terms of main food shopping, limited comparison shopping and services. Provides a reasonable range of local shops, services and community facilities;*
  - *Local town centres and local neighbourhood centres: Serve the smaller towns, villages and suburbs of larger towns in terms of top-up shopping and limited local services. In larger catchments, may be anchored by larger retail store serving proportion of main shopping needs;*
  - *Town centres associated with new development: To provide a range of local shops, services and community facilities; and*
  - *Commercial centre: Provides out-of-centre focus for household, shopping and leisure complementary to Linlithgow Town Centre'*
- 2.2.5 Policy TCR 1 ('Town Centres') supports residential use on the upper floors of commercial premises in town centres where this does not prejudice the operation of existing businesses at ground floor level, a satisfactory level of residential amenity can be achieved for the prospective occupants of the new homes, adequate car parking provision can be provided and sufficient school capacity is available to support the development.
- 2.2.6 Policy TCR 2 ('Town Centres First Sequential Approach') requires new retail, commercial leisure, visitor attractions, offices, community, cultural facilities and other developments appropriate to town centres to be located in accordance with the identified sequential approach, depending on the availability of suitable opportunities.

## 3 Market and Economic Trends

### 3.1 Market Trends

#### Introduction

- 3.1.1 This study has been undertaken in the midst of a renewed focus on the changing role and function of town centres. It is widely accepted that the traditional role of town centres has been undermined by the continued attraction of out-of-centre retail locations, the growth in popularity of multi-channel shopping, recent socio-economic and geopolitical events and the associated decline in expenditure growth. In this section of our report, we highlight some of these challenges in order to set the context for the remainder of the report.
- 3.1.2 There has been ongoing restructuring in the retail and town centre market for many years, accelerated by events such as the global financial crisis in 2008 and the more recent COVID-19 pandemic. Online sales have continued to rise, most developers are building less retail floorspace in line with reducing operator demand, and existing floorspace is being converted into alternative uses. High streets in Scotland were initially forced to close in March 2020, and again in January 2021 following several temporary easings of restrictions and local lockdown rules. Whilst high streets have since re-opened, some retailers have not returned, or have rationalised their store portfolio.
- 3.1.3 Previous rules on social distancing and Government guidance to work from home, the latter of which ended in late January 2022, led to reduced custom in town centres<sup>2</sup>. 'Hybrid' working arrangements have become the norm for many employers, with employees able to work from home for part of each week. These factors have created enormous challenges for town centres. Getting back to and then maintaining pre-COVID-19 levels of existing vitality and viability should be the objective for most town centres.
- 3.1.4 Below, we discuss recent socio-economic and geopolitical events that are affecting the retail and town centre market and the key trends of the last few years; we summarise the impacts of the COVID-19 pandemic; and we set out the main economic recovery scenarios.

#### Brexit

- 3.1.5 In 2019, the UK economy grew at its slowest rate in seven years, which was largely attributed to the uncertainty surrounding Brexit negotiations and a weaker global economy. The small growth in the UK economy was reflected in consumer spending, which only increased by 1.2 per cent, the smallest increase in eight years<sup>3</sup>. Low consumer confidence and lacklustre income growth was blamed for the disappointing growth in consumer spending.
- 3.1.6 It is expected that the outlook for retail sales volumes will be more favourable in the longer term with the removal of Brexit and COVID-19 related uncertainty, and the economic backdrop strengthens. However, an anticipated steady increase in inflation in 2025 and more gradual than expected cuts to interest rates are predicted to have a dampening effect in the medium term<sup>4</sup>.

---

<sup>2</sup> In planning policy terms, 'town centre' is the catch-all phrase for defined centres of all scales including city centres, town centres, district centres and local centres.

<sup>3</sup> Experian, Retail Planner Briefing Note 17, February 2020

<sup>4</sup> Experian, Retail Planner Briefing Note 22, March 2025

## **Russia-Ukraine and Middle East Conflicts**

- 3.1.7 The Russian invasion of Ukraine early in 2022 sent shock waves through the business community, which had been in the early stages of recovery following the lifting of COVID-19 restrictions. Experian's most probable long-term economic scenario assumes that the conflict in Ukraine continues and sanctions on and from Russia remain at the current level<sup>5</sup>.
- 3.1.8 In January 2025, after 15 months of war, Israel and Hamas agreed a deal to end the war in Gaza and release Israeli hostages and Palestinian prisoners. Experian's medium-term outlook assumes a fragile ceasefire between Israel and Hamas, with trade disruptions through the Red Sea<sup>6</sup>.

## **President Trump's Tariffs**

- 3.1.9 The recently elected US Government has caused increased uncertainty amongst businesses and consumers through the introduction of global tariffs, which will have an impact on the UK economy as global trade is negatively affected. Experian's central case assumes that no new tariffs are placed on imports from the UK or elsewhere into the US; however, the threat of tariffs persists<sup>7</sup>.

## **Retail Sales**

- 3.1.10 Retail sales volumes across Great Britain increased significantly upon the re-opening of non-essential retail in April 2021<sup>8</sup> and remained high during the first half of 2021 before diminishing as consumers spent less on durable goods and more in areas of the economy that had, up until that point, been 'locked down', such as travel and leisure.
- 3.1.11 More recently, retail sales volumes are estimated to have risen by 1.7 per cent in January 2025 following a fall of 0.6 per cent in December 2024. Whilst sales volumes rose by 1.0 per cent over the 12 months to January 2025, they were down 1.3 per cent compared with their pre-COVID-19 level in February 2020.
- 3.1.12 Convenience retail sales volumes grew by 5.6 per cent in January 2025, which is the largest monthly increase since March 2020 and follows four consecutive months of decline. Sales volumes increased across supermarkets, specialist foodstores such as butchers and bakers, and alcohol and tobacco shops, which retailers attributed to more people eating at home in January.
- 3.1.13 Non-store retailers' sales volumes increased by 2.4 per cent in January 2025, somewhat recovering from the 3.4 per cent decrease in December 2024. Retailers in this sector reported post-Christmas sales remaining strong. Retail sales volumes fell by 1.3 per cent in January across non-food stores. Clothing and household goods operators suggested that the fall was due to reduced consumer confidence.
- 3.1.14 The amount spent online fell by 1.7 per cent over the month to January 2025. When comparing the three months to January 2025 with the three months to October 2025, online

---

<sup>5</sup> Experian, Retail Planner Briefing Note 22, March 2025

<sup>6</sup> Ibid.

<sup>7</sup> Following the publication of Experian's Retail Planner Briefing Note on 18 March 2025, the US imposed a 25 per cent tariff on car imports. We understand that the UK Government is trying to a deal with the US to secure an exemption.

<sup>8</sup> The lockdown dates referred to earlier in this section relate to the UK national lockdowns.

spending values fell by 4.8 per cent. On a more positive note, however, sales values rose by 0.8 per cent when comparing January 2025 with January 2024<sup>9</sup>.

## Store Closures

- 3.1.15 Table 3-1 below shows the net changes in Great Britain’s retail units occupied by multiples and chains (those with five or more outlets) per year over the 2015 to 2023 period (as well as the latest data for the first half of 2024, hereafter referred to as ‘H1 2024’). The gap between store openings and closures grew continuously between 2015 and 2021 before dropping suddenly to -3,627 in 2022. Whilst the net loss experienced in 2022 represents a 64 per cent year-on-year decrease from the 2021 figure of -10,059, it was the eighth consecutive year that the trend of a net loss of retail units had persisted<sup>10</sup>. The net loss of retail units occupied by multiples and chains grew by 1,316 between 2022 and 2023. Data for H1 2024 show another net loss in retail units and this figure will undoubtedly increase when the full dataset for 2024 is published.
- 3.1.16 The data below show that there were 14,081 store closures amongst multiples and chains in 2023, which is an increase of 6 per cent when compared with the number of store closures in 2015. Between 2015 and 2023, the net change in Great Britain’s retail units was minus 50,481, which is clearly a substantial loss of retail units and reflective of the general trend of decline in demand for physical floorspace as the market share of online shopping continues to rise.

Table 3-1: Net change in GB retail units occupied by multiples and chains by year 2015-2023 plus data for H1 2024

| Year               | Store Openings | Store Closures | Net Change in GB Retail Units |
|--------------------|----------------|----------------|-------------------------------|
| 2015               | 12,121         | 13,268         | -1,147                        |
| 2016               | 11,806         | 14,439         | -2,633                        |
| 2017               | 12,264         | 16,274         | -4,010                        |
| 2018               | 8,767          | 15,304         | -6,537                        |
| 2019               | 9,690          | 17,338         | -7,648                        |
| 2020               | 7,655          | 17,532         | -9,877                        |
| 2021               | 7,160          | 17,219         | -10,059                       |
| 2022               | 7,903          | 11,530         | -3,627                        |
| 2023               | 9,138          | 14,081         | -4,943                        |
| <b>2015 – 2023</b> | <b>86,504</b>  | <b>136,985</b> | <b>-50,481</b>                |
| H1 2024            | 4,661          | 6,945          | -2,284                        |

- 3.1.17 Data show that operators are continuing to move out of high streets in favour of retail parks. Footfall is one of the main reasons for this; the reduction in the number of shoppers (currently estimated to be around 15-20 per cent lower than pre-pandemic levels) has adversely affected decreased sales and the profitability of some operators. High streets have been particularly affected, in part due to their vulnerability to poor weather. Shopping centres have also witnessed a drop in footfall; however, for the first time since the pandemic, they have seen slightly fewer net closures than the national average. Shopping centres are typically owned by a single, unified landlord and so can respond to the challenges of vacant units more quickly. Shrewd landlords do not necessarily seek to replace one retailer with another and instead turn

<sup>9</sup> Office for National Statistics (‘ONS’), released 21 February 2025, ‘Retail sales, Great Britain: January 2025’. Available online: <https://www.ons.gov.uk/businessindustryandtrade/retailindustry/bulletins/retailsales/january2025>

<sup>10</sup> PWC, Store Openings and Closures 2023. Available online: <https://www.pwc.co.uk/industries/retail-consumer/insights/store-openings-and-closures-2023.html>

to different uses such as leisure, entertainment and hospitality to fill vacancies precipitated by the pandemic and to attract different types of footfall<sup>11</sup>.

- 3.1.18 Retail parks were the only location-type in which footfall improved over the 12 months to August 2024. The number of chain outlets actually increased by 0.4 per cent within retail parks in H1 2024. Some high streets and shopping centres suffer from poor public transport accessibility and increasingly strict rules on driving and parking within many town centres may deter some shoppers. On the other hand, retail parks are typically easily accessible by car and offer plentiful free parking and are often anchored by large foodstores, increasing the number of linked trips. Retail parks have continued to improve their offer with more leisure amenities such as drive-throughs, and the associated increases in footfall and units have remained despite a reduction in the demand during the cost-of-living crisis for home and DIY stores, which typically have a significant presence within retail parks<sup>12</sup>.

### **Online Shopping/Special Forms of Trading**

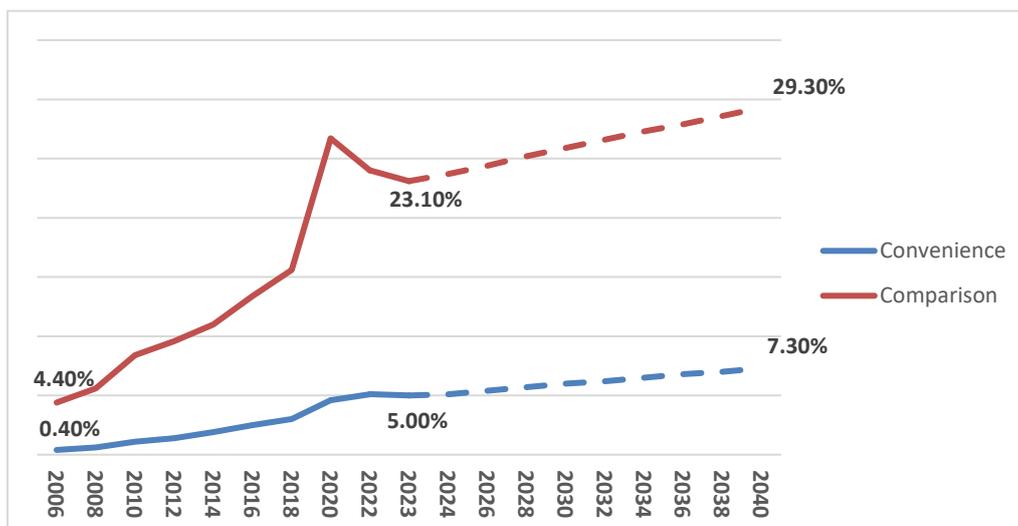
- 3.1.19 Figure 3-1 shows the market share of special forms of trading ('SFT', which includes online shopping) in both the convenience and comparison retail sectors up to 2023 and forecast to 2040. Experian defines SFT as any non-store retailing including internet sales, mail order sales, market stalls, vending machines, door-to-door selling and telephone sales. Internet sales account for a large proportion of SFT.
- 3.1.20 The market share of SFT in both the comparison and convenience retail sectors has been increasing year on year and this trend accelerated in 2020 and 2021 as lockdowns and COVID-19 related fears made in-person shopping unlawful or less desirable. The market share of SFT in the comparison retail sector peaked at an average of 26.7 per cent in 2020; however, as COVID-19 restrictions eased, this dropped back to an average of 24.0 per cent in 2022. A further small decline was experienced in 2023 (to 23.1 per cent), with certain online users (particularly older, less digitally literate cohorts) reverting back to traditional shopping habits (albeit most of the increase in the market share of SFT seen during the pandemic has not been reversed).
- 3.1.21 Figure 3-1 shows that the market share of SFT in both the comparison and convenience retail sectors resumed an upward trajectory in 2024, which is expected to continue over the period to 2040, with SFT's market share in the comparison retail sector expected to reach just shy of 30 per cent.
- 3.1.22 SFT's market share is increasing more sharply in the comparison retail sector than in the convenience retail sector. One of the reasons is because foodstore operators find it difficult to make online shopping profitable. The obvious implication of this is that less comparison retail floorspace will be required and, as we go on to explain in more detail later in our report, SFT's market share across the study area defined for this study (30.1 per cent) is already much higher than the national average for comparison goods expenditure (24.1 per cent).

---

<sup>11</sup> PWC, Store Openings and Closures H1 2024. Available online: [Store Openings and Closures H1 2024 - PwC UK](#)

<sup>12</sup> Ibid.

Figure 3-1: Actual and projected market share of non-store retail sales/SFT (adjusted for SFT sales from stores)



Source: Experian Retail Planner Briefing Note 22 (March 2025). Figure 5, Appendix 3.

3.1.23 Generally speaking, the performance of the high street retail sector is weakening, and has been for some time. Consequently, many local authorities will need to consider condensing and concentrating the defined retail area in their town centres, as well as the best ways of introducing and expanding alternative uses, such as residential and office uses.

### Commercial Retail Rents

3.1.24 Average retail rental values have grown very modestly since 2022 following three years of decline, accelerating to 1.7 per cent per annum in January 2025 from 1.3 per cent in December 2024, which is the highest rate since 2008. The trend in retail rental values varies significantly, however, depending on the type of property and location. Average rents for high street shops have been rising since May 2023, and rose at an annual rate of 1.3 per cent in January 2025. In contrast, average annual rental growth for UK shopping centres rose to 1 per cent in January 2025 from minus 0.3 per cent in December 2024, representing the first positive annual reading for this sector since early 2017<sup>13</sup>.

## 3.2 Convenience Retail Sector

3.2.1 Prior to the global financial crisis, the convenience goods retail sector was a key driver of growth in the retail sector. The original 'Big Four' foodstore operators (Asda, Morrisons, Tesco and Sainsbury's), which have traditionally dominated the market, were building and operating increasingly larger stores and expanding the range of services that they provide (particularly in terms of comparison retail goods). Whilst many of these larger stores were built outside of town centres, new large foodstores also often served to anchor re-development schemes within smaller town centres.

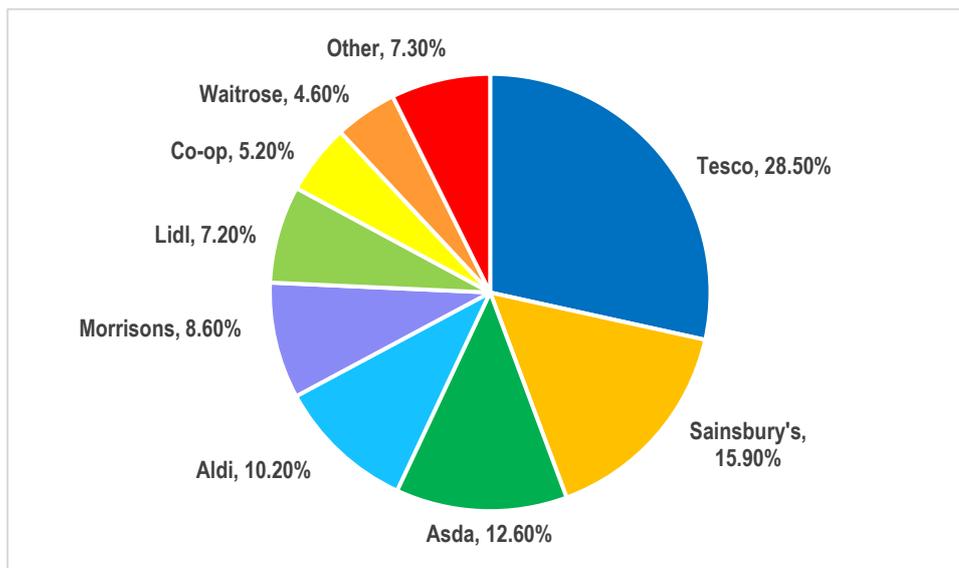
3.2.2 Following the global financial crisis, the market dominance of the traditional 'Big Four' has been increasingly challenged, both by higher-end operators, such as Waitrose and Marks & Spencer (Simply Food and Foodhall formats), and retailers which previously focused on the value/discount end of the market, such as Aldi and Lidl, which have achieved significant year-on-year growth over recent years as they have emerged as important forces in the convenience goods retail sector. Expenditure on convenience retail goods had been falling in

<sup>13</sup> Carter Jonas, Commercial Market Outlook. Available online: [https://www.carterjonas.co.uk/commercial-market-outlook#:~:text=Average%20rents%20for%20standard%20\(high,the%20current%20actual%20annual%20rate.](https://www.carterjonas.co.uk/commercial-market-outlook#:~:text=Average%20rents%20for%20standard%20(high,the%20current%20actual%20annual%20rate.) Last updated on 27 February 2025.

recent years due to increasing competition between operators (leading to a reduction in prices and low inflation).

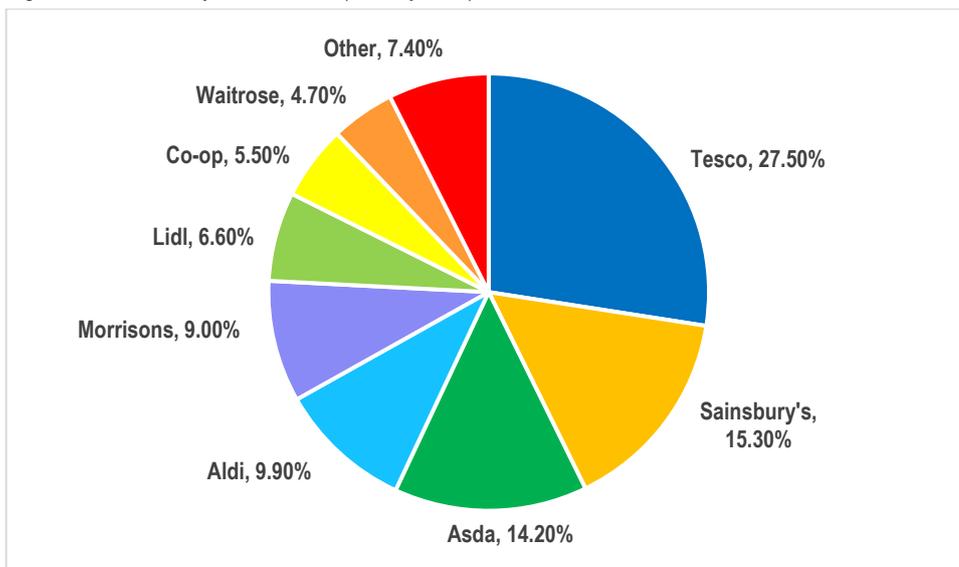
3.2.3 Figures 3-2 and 3-3 show the UK grocery market share as of January 2025 and January 2023, respectively. It is evident that Morrisons has not been a 'Big Four' foodstore operator for the last couple of years, with Aldi now taking its place. Asda's market share has reduced by 1.6 percentage points over the two-year period, whilst Aldi's has increased by 0.3 percentage points. If this trend continues, Aldi will soon have the third largest market share out of all the foodstore operators, with Asda being demoted to fourth place. Aldi and the traditional 'Big Four' operators account for approximately three quarters of the convenience retail market.

Figure 3-2: UK Grocery Market Share (January 2025)



Source: KANTAR

Figure 3-3: UK Grocery Market Share (January 2023)



Source: KANTAR

3.2.4 There has been an increasing move by the major convenience goods retail operators away from opening larger-format stores, towards smaller supermarkets and establishing a network of 'top up' convenience goods shopping facilities. These smaller-format stores are often located in town centres, or district/neighbourhood shopping parades. The shift has been

driven by changing consumer behaviour; shoppers are undertaking an increasing number of smaller 'top-up shopping' or 'basket shopping' trips instead of a weekly food shop at a large out-of-centre foodstore.

- 3.2.5 One of the reasons which explains why retailers such as Aldi and Lidl have increased their market share over recent years is because they have successfully diversified their offers to include more premium products, thereby appealing to new categories of customers. Those retailers are no longer really 'discount operators' in the way they were 10 or more years ago, and they have effectively become mainstream foodstore operators.
- 3.2.6 Both Sainsbury's and Tesco now have more convenience stores than large supermarkets and superstores, and they have withdrawn proposals for new superstores and from town centre redevelopment projects in recent years. In the last few years both Tesco and Morrisons have closed dozens of 'unprofitable' foodstores to concentrate on their core business.
- 3.2.7 By way of comparison, Aldi has been on a rapid expansion drive. The retailer currently has more than 1,020 stores and is continuing to work towards its long-term target of more than 1,500 stores across the UK<sup>14</sup>. At the end of 2024, Aldi announced that it would invest around £650 million across Great Britain in 2025 and target around 30 new store openings, further demonstrating its success<sup>15</sup>. The supermarket retailer revealed that nine of these new store openings would be in London as it sets to invest £55 million within the M25<sup>16</sup>.
- 3.2.8 In its aim to become the UK's leading omnichannel retailer, Marks & Spencer announced a £480 million investment in its store rotation programme in January 2023<sup>17</sup>. The retailer opened around 20 new, bigger and better stores during the 2023/24 financial year, helping to fulfil its aim of creating a store estate fit for the future. The store rotation programme seeks to ensure the right stores in the right places, with the right space, and the company aims to evolve its current portfolio of stores to a series of higher quality, higher productivity full line stores selling clothing, homewares and food whilst also opening over 100 bigger and better foodstores by 2027/28.

### 3.3 Comparison Retail Sector

- 3.3.1 Over the last few years there have been many notable failures and company restructurings within the comparison goods retail sector, including Homebase, Morphe Cosmetics, Ted Baker, Dawsons Music, T M Lewin, Jessops, Paperchase, Debenhams, Edinburgh Woollen Mill, Arcadia and, most recently, the high street fashion retailer Quiz which has closed 23 stores across the UK. Furthermore, the impacts of COVID-19 have led to some major operators not returning to the high street, such as Topshop. It is not just operators with physical store formats that have suffered the impacts of COVID-19, however. Missguided, the e-commerce fashion group, went into administration in May 2022. The company was particularly successful during the pandemic, when lockdown measures forced many clothing stores to temporarily close, but sales were affected upon the reopening of stores<sup>18</sup>.
- 3.3.2 Whilst the circumstances impacting each of the retailers are specific to them, a couple of common themes have led to companies failing or needing to restructure, including:

---

<sup>14</sup> Aldi, Business News: Aldi shares update on new store locations wish list. 26 June 2024. Available online: <https://www.aldipresscentre.co.uk/business-news/aldi-shares-update-on-new-store-locations-wish-list/>

<sup>15</sup> Aldi, Business News: Aldi announces £650 million investment as part of 2025 expansion plans. 18 December 2024. Available online: <https://www.aldipresscentre.co.uk/business-news/aldi-announces-650-million-investment-as-part-of-2025-expansion-plans/>

<sup>16</sup> Aldi, Business News: Aldi to open nine London stores in 2025 as part of £650 million investment in Britain. 17 January 2025. Available online: <https://www.aldipresscentre.co.uk/business-news/aldi-to-open-nine-london-stores-in-2025-as-part-of-650-million-investment-in-britain/>

<sup>17</sup> [M&S Sets Out C.£500m Investment in its Store Rotation Programme That Will Create Over 3400 Jobs Nationwide | Marks & Spencer \(marksandspencer.com\)](https://www.marksandspencer.com/news/m-s-sets-out-c-500m-investment-in-its-store-rotation-programme-that-will-create-over-3400-jobs-nationwide)

<sup>18</sup> [Who's Gone Bust in Retail? The Centre For Retail Research](#)

- **Relevance** – the format of certain retailers is becoming less relevant, a good example of this being Toys R Us. Due to the size of the stores, Toys R Us found itself competing against larger retailers such as foodstores and the likes of Argos. As Toys R Us was a specialist retailer, it was unable to change the type of goods being sold within its stores (in the way that foodstores and catalogue retailers can) and therefore Toys R Us could not react to the market change as freely. Toys R Us also had to compete against large online retailers, such as Amazon, which can offer goods at cheaper prices due to lower overheads.
- **Over-expansion** – some retailers over-expanded in the early 2000s and have not been able to respond to the growth in online retailing and decline in high street retailing. A good example of this is Maplin, which experienced rapid growth but found that its specialist product was more tailored to an online audience.

3.3.3 Whilst it is a common view that the prevalence of online retailing will continue to increase, it would be naïve to dismiss the role of the high street and multi-channel retailing. Often, the most successful online brands are built from their reputation on the high street (a good example being John Lewis).

### 3.4 Commercial Leisure

3.4.1 Following the global financial crisis, the restaurant sector felt the effects of the ‘casual dining crunch’ due to an over-saturation of the market and increased competition as well as increasing food costs, staff costs, rents and business rates. More recently, despite customers spending more when they dine, they are eating out less often and the growth in spend and revenues is in fact a red herring given that it has been below the rate of inflation<sup>19</sup>. The cost-of-living crisis has led to the return of the ‘discount downward spiral’ and many restaurant operators pushing loyalty apps to encourage customers to return<sup>20</sup>.

3.4.2 Restaurant closures are at their highest rate in over a decade, with a total of 1,409 UK restaurant businesses entering insolvency in 2023/24 (year ending 30 September 2024), up from 1,180 in 2022/23<sup>21</sup>. This is due to rising labour costs, food inflation and low consumer confidence. The trend of closures follows a number of restaurant chains, including Byron, Gourmet Burger Kitchen, Strada and Carluccio’s, being forced to close dozens of restaurants in the peak of the pandemic as they could not withstand the various lockdowns and other COVID-related restrictions. One commentator noted that those restaurants which were kept afloat during the pandemic due to government support schemes are now faced with rising inflation, a post-Brexit labour shortage and consumers who have less spending power<sup>22</sup>. Commentators envisage further restaurant closures, particularly amongst large chains.

3.4.3 The intermittent closure of the casual dining sector during the COVID-19 pandemic is partly responsible for the boost in fast-food takeaways, which is now the fastest growing category nationally. Many fast-food takeaways have expanded their estate to cater for increased demand and to take advantage of favourable trading conditions.

3.4.4 Many consider spending on leisure to be discretionary and therefore it is likely to be in line with the performance of the UK economy. Table 3-2 shows average weekly household spending on leisure between 2009 and 2023. It is worth noting that the 2009 data coincided with the aftermath of the global financial crisis, 2014 was prior to the Brexit vote, data from the

<sup>19</sup> <https://www.bidfood.co.uk/blog/the-uk-eating-out-market-where-is-it-headed/>

<sup>20</sup> The Caterer, Could the return of discounting spell trouble for casual dining?, 14 January 2025. Available online: <https://www.thecaterer.com/indepth/could-return-discounting-spell-trouble-for-casual-dining>

<sup>21</sup> The Caterer, Over 6,000 restaurants expected to close in the next 12 months, 25 November 2024. Available online: <https://www.thecaterer.com/news/restaurant-closures-price-bailey-prediction>

<sup>22</sup> Data from UHY Hacker Young sourced in The Guardian, UK restaurant insolvencies jump by more than 60 per cent in year, data shows, July 2022. Available online: [UK restaurant insolvencies jump by more than 60% in year, data shows | Hospitality industry | The Guardian](https://www.theguardian.com/hospitality/2022/jul/uk-restaurant-insolvencies-jump-by-more-than-60-per-cent-in-year-data-shows)

financial year ending 2020 relate to the period immediately prior to the COVID-19 pandemic and data from the financial year ending 2023 are the latest available figures.

Table 3-2: Average Weekly Household Spending Data 2009-2023

| Spending Category  | 2009 (£) | 2014 (£) | 2020 (£) | 2023 (£) | % change (2009-2020) | % change (2009-2023) | % change (2020-2023) |
|--|----------|----------|----------|----------|----------------------|----------------------|----------------------|
| Cinema, theatre and museums etc.                                       | 2.30     | 2.80     | 3.30     | 2.90     | 43.5                 | 26.1                 | -12.1                |
| Admissions to clubs, dances, disco and bingo                           | 0.50     | 0.50     | 0.80     | 0.60     | 60                   | 20                   | -25                  |
| Restaurant and café meals  | 13.30    | 16.60    | 20.20    | 14.00    | 51.9                 | 5.3                  | -30.7                |
| Takeaway meals and other snack food                                    | 8.00     | 8.80     | 10.90    | 7.10     | 36.3                 | -11.3                | -34.9                |
| Gambling payments  | 4.10     | 2.90     | 2.40     | 1.20     | -41.5                | -70.7                | -50                  |
| Sports admission, subscriptions, leisure class fees and equipment hire | 5.00     | 6.90     | 7.80     | 5.90     | 56                   | 18                   | -24.4                |

Source: ONS, Family Workbook Spending in the UK, March 2021 and August 2024

- 3.4.5 Between 2009 and 2020, the average weekly household spend increased across all of the sub-categories with the exception of gambling payments. There was a significant growth in spending on sports admission subscriptions and leisure class fees, largely led by a doubling of spending on subscriptions to sports and social clubs, which reflects the growth in the discount gym market.
- 3.4.6 There was also a significant increase (51.9 per cent) in spending on restaurant and café meals between the global financial crisis and 2020. The decrease in spending on gambling (minus 41.5 per cent) was largely led by a significant fall in spending at bookmakers. Online gambling, however, has become much more prevalent in recent years. A survey carried out between July and October 2024 found that the online gambling participation rate was 38 per cent. This figure, however, fell to 15 per cent when lottery draw only players were removed<sup>23</sup>.
- 3.4.7 When compared with the data for 2020, the data for 2023 show a vastly significant reduction in average weekly household spending across all of the commercial leisure sub-categories, perhaps due to the cost-of-living crisis, which led households to rein in their spending. The change in the average weekly household spending on sports admissions, takeaways and restaurants was less marked when compared to the other spending categories, demonstrating which leisure activities households would rather spend their money on during difficult financial times.

<sup>23</sup> Gambling Commission, Statistics on gambling participation – Year 2 (2024), wave 3: Official statistics, 27 February 2025. Available online: <https://www.gamblingcommission.gov.uk/statistics-and-research/publication/statistics-on-gambling-participation-year-2-2024-wave-3-official-statistics>

### 3.5 Impacts of COVID-19

- 3.5.1 The retail property market was already challenging before the onset of the COVID-19 pandemic, with an increasing volume of activity shifting to online shopping. With three national lockdowns, local lockdown rules and some form of restrictions on economic life for almost two years, the short-term impacts of the global pandemic on retail were stark. In 2020, total retail sales volumes fell by 1.9 per cent in Great Britain compared with 2019, the largest annual fall on record<sup>24</sup>. A number of national multiple retailers were forced to restructure or enter administration, including Clarks, Debenhams, Oasis, Warehouse, Cath Kidston and Brighthouse. In contrast, independent retailers performed better during the pandemic with 804 units opening in the first half of 2021<sup>25</sup>. This growth can be attributed in part to government support measures, business rates relief and the moratorium on evictions for commercial tenants, all of which enabled them to remain operational.
- 3.5.2 Longer-term potential impacts of COVID-19 are covered below.

### 3.6 Potential Economic Scenarios

- 3.6.1 As well as outlining 'the base case' for the UK's medium/long-term macro-economic performance, Experian puts forward three alternative scenarios, namely 'severe case', 'higher case' and 'very severe case'<sup>26</sup>.
- 3.6.2 In terms of the medium outlook, the base case<sup>27</sup> assumes a continuation of current geopolitical tensions and US import tariffs. More specifically, it assumes a fragile ceasefire between Israel and Hamas with trade disruptions through the Red Sea, and that the conflict in the Ukraine continues together with sanctions imposed on and by Russia. Moreover, the base case assumes that the US will not impose any new tariffs on imports from the UK or elsewhere, although existing tariffs and the threat of further tariffs remains. Geopolitical disruption and the threat of tariffs are predicted to result in domestic uncertainty with fragile business and consumer confidence persisting in 2025.
- 3.6.3 Consumer Price Index ('CPI') inflation rose to 3 per cent in January 2025 and Experian expects inflation to peak at 3.7 per cent in Q4 2025 following a further rise in the OFGEM energy price cap in April and a boost to demand associated with the large, front-loaded increase in government expenditure announced in the Autumn Budget. Furthermore, higher employers' National Insurance Contributions ('NICs') and minimum wage increases are forecast to inflate consumer prices as employers seek to offset some of these additional costs. Nevertheless, Experian assumes a gradual relaxation in monetary policy given the fundamental weakness in economic growth and a continued labour market loosening. It is expected that the unemployment rate will continue to rise steadily, and wage growth will slow down as the global backdrop remains challenging and businesses try to cut costs in the light of higher employers' NICs. As such, consumer spending is expected to grow by a moderate 1.0 per cent in 2025. GDP is forecast to grow from 0.9 per cent in 2024 to 1.3 per cent in 2025, increasing to an average of 1.6 per cent in 2026/27 as interest rates settle and business and consumer confidence improves.
- 3.6.4 The longer-term growth potential of the UK economy is largely predicated on supply side factors such as the size of the population and the labour force, structural unemployment and productivity. The fallout of the COVID-19 pandemic will continue to influence long-term growth dynamics. Recent ONS data show that the employment rate is 1.5 percentage points lower than the pre-pandemic level whilst the economic inactivity rate is 0.9 percentage points higher. The ultimate terms of the new UK-EU economic relationship remain a major factor in the long-

<sup>24</sup> ONS, Impact of the coronavirus (COVID-19) pandemic on retail sales in 2020, February 2021

<sup>25</sup> Local Data Company, Looking Beyond Lockdown: GB Retail and Leisure Market Analysis H1 2021, September 2021

<sup>26</sup> Experian, Retail Planner Briefing Note 22, March 2025

<sup>27</sup> Also referred to as 'the baseline scenario' or 'the central case'

term forecast. The base case assumes that the UK will continue to have access to the single market under the new arrangement of enhanced customs checks; however, it is unlikely that this arrangement will be as favourable as EU membership, impacting upon the long-term outlook for trade, investment and GDP. Population is expected to increase on average by 0.4 per cent per annum over the 2030-2040 period, which is below the average witnessed between 2005 and 2016. Productivity growth is forecast to recover from recent lows to 1.5 per cent; however, this is significantly below the 2.2 per cent average in the decade leading up to the last recession. The UK Bank Rate is expected to ease to 4.0 per cent by Q1 2026.

- 3.6.5 In addition to the base case, Experian presents one upside ('higher case') and two downside scenarios ('severe case' and 'very severe case'). The alternative scenarios assess the different ways in which the Russia-Ukraine and Middle East conflicts could play out (and whether any further sanctions are imposed), the level of disruption arising from the Red Sea Crisis, whether the US will impose any new tariffs on imports and the associated impacts on the global and UK economies.
- 3.6.6 A 30 per cent probability is attached to the more optimistic 'higher case', in which it is assumed that any US import tariffs introduced since the start of the new presidency are removed and the threat of new tariffs disappears, resulting in a steady increase in global growth and a boost in the demand for UK goods. An improved geopolitical backdrop also benefits global growth; the higher case assumes that the recently announced ceasefire between Israel and Hamas holds and trade flows through the Red Sea return to normal. Moreover, an agreement is reached between Russia and Ukraine and sanctions on and by Russia are lifted. The dissipation of supply chain disruptions and an easier trading environment have a positive impact on inflation globally. In the UK, CPI inflation drops to below 1 per cent by the end of 2025 and the Bank Rate falls to 3.0 per cent by Q3 2025. Business confidence responds well to the more positive monetary policy outlook resulting in strong growth in business investment. In turn, this supports job hiring and the unemployment rate drops to 3.8 per cent in 2027. A more positive outlook for household finances underpins stronger consumer confidence, and savings built up over lockdowns are more readily spent. GDP is 3.8 per cent higher than the central case's long-term forecast.
- 3.6.7 A 25 per cent probability is attached to the 'severe case' in which it is assumed that a 20 per cent tariff is imposed on all imports into the US, including those from the UK, whilst a harsher 60 per cent tariff is imposed on all imports from China. In response to this, the UK, EU and China implement reciprocal 20 per cent tariffs on imports from the US. As with the central case, the severe case assumes that a fragile ceasefire between Israel and Hamas remains, as does disruption to trade through the Red Sea. The conflict in Ukraine continues and sanctions imposed on and by Russia persist at the current level. The imposition of tariffs negatively impacts UK export volumes to the US on a permanent basis and the introduction of retaliatory tariffs increases the cost of UK imports. The result is that CPI inflation peaks at 5.1 per cent in Q4 2025. Given the above, there is some disruption to supply chains, which places more upward pressure on inflation globally, having a knock-on impact on UK prices. In response to the rise in inflation, the UK Bank Rate increases to 6.0 per cent through Q4 2025 to Q3 2026. This puts more pressure on businesses, which from April will be faced with higher employers' NICs. Businesses put less emphasis on job hiring and the unemployment rate peaks at 5.7 per cent in 2027. Rising unemployment, upward inflation and slower wage growth underpin a marked decrease in real personal disposable income growth in 2025 notwithstanding the large increases in the minimum wage and state pension in April. As the effects of the minimum wage increase wear off, income growth declines in 2026 before rising slowly in 2027 and in turn consumer spending growth significantly declines. GDP is 3.3 per cent lower than in the base case projection in the long-term.
- 3.6.8 A 5 per cent probability is attached to the 'very severe case', which adopts the same outlook as the base case regarding the Russia-Ukraine and Middle East conflicts and the US tariffs. In the very severe case, however, a rise in US Treasury yields since the Autumn has triggered an increase in government bond yields in most developed countries. The rise in gilt yields in the UK has been particularly marked due to domestic factors such as persistently high services inflation, strong nominal pay growth and a significant increase in public expenditure

and borrowing announced in the Autumn Budget. The very severe case assumes that inflation in the US and the UK rises as a result of big spending commitments from the newly elected US Government. In the UK, the growth in GDP is poor in the short-term and the debt to GDP ratio begins to not align with fiscal rules. Against this backdrop, the 10-year gilt yield continues to rise from 4.52 per cent as of March 2025 to a peak of 8.75 per cent in the second half of 2025. During the same period, the Bank of England hikes the Bank Rate up to 8.25 per cent to address rising inflation and to avert further sterling depreciation. Simultaneously, given the significant rise in borrowing costs and the rising debt to GDP ratio, the Government slashes public expenditure and raises taxes on both businesses and households further. The weakening outlook for businesses leads to a pause in hiring and the unemployment rate increases gradually to a peak of 7.4 per cent in H1 2027. Consumer spending falls in 2025 and 2026 which is exacerbated by a deterioration in wealth effects as house prices decline. GDP is 7.3 per cent lower than it is in the base case.

## 4 Performance Analyses

### 4.1 Introduction

- 4.1.1 We have undertaken performance analyses (otherwise known as ‘health checks’) of Livingston as well as the five traditional town centres of Armadale, Bathgate, Broxburn/Uphall, Linlithgow and Whitburn. Our appraisals were informed by visits to the centres on 28 and 29 January 2025, and desk-based research.
- 4.1.2 The performance analyses have been prepared with reference to the key indicators<sup>28</sup> for assessing town centre health that are set out within ‘Annex A – Town Centre Health Checks and Strategies’<sup>29</sup> to Scottish Planning Policy:
- retailer representation and intentions to change representation;
  - leisure and tourism facilities;
  - evening/night-time economy;
  - physical structure of the centre including general appearance of main buildings and major streets;
  - historic environment;
  - public realm and green infrastructure;
  - vacancy rates;
  - pedestrian footfall;
  - accessibility;
  - public transport infrastructure and facilities; and
  - parking offer.
- 4.1.3 Where relevant, we compare our findings with those from the Council’s previous retail study<sup>30</sup> in order to track changes in the performance of the centres over the past 16 years.
- 4.1.4 As well as providing the base position for the future monitoring of town centre vitality and viability, the performance analysis exercise identifies the key strengths of the centres as well as deficiencies and areas that would benefit from improvement. We then use this information to inform our recommendations in subsequent sections of our report.
- 4.1.5 For all the centres except Armadale and Uphall, the diversity of uses audits are based on Experian Goad plans, updated by Stantec in January 2025. Goad plans do not exist for Armadale or Uphall and so we recorded all of the uses within the centres during our visits. We assigned the units in Armadale and Uphall an Experian Goad code so that they could be analysed in the same way as the other centres. Floorspace data were not available for these two centres and so our diversity of uses audits focus on the number and mix of units only.
- 4.1.6 It is worth highlighting that some town centre uses such as public houses, bars, nightclubs, cinemas, theatres, solicitors, betting offices and dentists are not listed within Experian’s Centre Report and are therefore excluded from the diversity of uses analyses. This results in a difference between the actual number of units within a defined centre and the number of units reported within the diversity of uses analysis (as well as within the individual retail categories). Where relevant, however, we have referred to these common town centre uses within our

<sup>28</sup> There are 23 indicators listed in Annex A; we have listed those we deem most suitable for a Retail Study.

<sup>29</sup> ‘[Annex A - Town Centre Health Checks and Strategies](https://www.gov.scot/resources/consultation-papers/plain-text/Annex-A-Town-Centre-Health-Checks-and-Strategies.pdf)’ - Scottish planning policy, gov.scot ([www.gov.scot](http://www.gov.scot))

<sup>30</sup> West Lothian Retail Capacity Study Final Report (November 2008)

qualitative appraisal of the centres. Furthermore, Experian Goad only records uses within ground floor units, except for shopping centres, where the uses on each floor are recorded. For example, an entrance to a first-floor restaurant would not be assigned a Goad code.

- 4.1.7 It is also worth noting that the Goad definition of each centre differs slightly from the adopted town centre boundary and so the diversity of uses analysis relates to those units shown on the Goad plan as opposed to those within the adopted town centre boundary. For example, with reference to Figure 4-1 below, the adopted town centre boundary for Livingston includes the units along the northbound side of Almondvale Boulevard as well as West Lothian College, Livingston Football Club and the nearby Lidl store in the north, Mercure Livingston Hotel and surrounding businesses in the east, the units beyond Almondvale Road in the south (most notably those located at Almondvale South Retail Park) and Almondvale Business Park in the west; however, these uses are not included within the Goad plan for Livingston. We did, however, purchase the separate Goad plan for Almondvale South Retail Park and subsume the diversity of uses analysis data into that for Livingston.

Figure 4-1 Adopted town centre boundary (right, outlined in blue) and Experian Goad's survey area (right)



Source: West Lothian Local Development Plan 2018 Map 3: Livingston Area (left) and Experian Goad (right)

## 4.2 Performance of Livingston Town Centre

- 4.2.1 In this section we assess the health of Livingston Town Centre (that is, the area outlined in blue in Figure 4-1 above), as opposed to the sub-regional centre of Livingston, which also includes a number of neighbourhood centres that serve more local needs.

### Previous Findings

- 4.2.2 The West Lothian Retail Capacity Study (November 2008) notes that Livingston is the primary retail centre within West Lothian and one of the largest and most popular retail centres in the country. With it being one of Scotland's five new towns, Livingston has a particular focus on retail. Given the passage of time since the 2008 study, the shopping centres/retail parks which constitute Livingston's core retail area have changed names. Today, these shopping centres/retail parks are known as The Centre Livingston, Livingston Designer Outlet and Almondvale Retail Park. The previous retail study found that Almondvale (Livingston) was performing as a successful sub-regional centre with large foodstores and smaller retailers serving six neighbourhood centres, and further expansion planned (which can now be seen on the ground today).
- 4.2.3 The previous retail study assessed each centre against a range of indicators it described as being commonly used to assess how well a centre caters for its users. Each centre was rated as 'very poor', 'poor', 'acceptable', 'good' or 'excellent' against the indicators listed in Figure 4-2 below.

Figure 4-2 West Lothian Retail Capacity Study (November 2018): town centre assessment indicators

- Pedestrian Access (consider ease of movement, pedestrian/traffic separation, traffic calming, availability of crossings at desire routes, drop kerbs, state of pavements)
- Public Transport Access (consider convenience, frequency and coverage of bus/rail services, sheltered bus stops).
- Car and Van Access (consider congestion, availability of parking, availability of loading, on and off street, long and short term, paid and unpaid, availability of loading bays and any restrictions).
- Cycling Access (consider cycleways, crossings, storage and security).
- Mobility Impaired Access (consider disabled parking, ramp access to buildings, disabled toilet facilities, Shopmobility scheme).
- Condition of Buildings (repair, environment, evidence of investment).
- Condition of Public Spaces (landscaping, street furniture, public art, baskets and flowers, general quality of maintenance and environment).
- Information (signage availability and design quality, maps, newsletter, corporate identity, marketing).
- Environment (consider availability of litter bins, removal of trade refuse, street/footpath surface, graffiti/fly posting).
- Amenities (cash machines, post office, public toilets, baby changing).
- Leisure (heritage, theatres and museums, pubs/cafes, sports, youth activities).

Source: West Lothian Retail Capacity Study (November 2018)

4.2.4 Almondvale (Livingston) was rated 'excellent' in terms of accessibility, with the exception of cycling accessibility for which it was rated 'poor'. The centre also received an 'excellent' rating for the condition of buildings and public realm and a 'good' rating for information, environment, amenities and leisure.

### **Diversity of Uses**

4.2.5 Livingston Town Centre<sup>31</sup> contains a total of 303 retail/service units, with a combined floorspace of 161,750 sq.m gross. The diversity of uses present within the town centre in terms of the number and proportion of units and floorspace is set out in Table 4-1, compared with the Goad UK average for all of the c.1,950 centres and shopping locations covered by Experian<sup>32</sup>. The full breakdown of uses can be found within Appendix A of the separate Appendices Volume<sup>33</sup>. For all the centres for which we have completed performance analyses, the reader must take care when comparing the centre's diversity of uses to the UK average for all centres, which does not necessarily represent a like-for-like comparison given that it is an average spanning the largest city centres through to much smaller centres.

<sup>31</sup> Including Almondvale South Retail Park.

<sup>32</sup> Hereafter referred to as 'the UK average for all centres'.

<sup>33</sup> The full breakdown of uses for the other centres can also be found within Appendix A.

Table 4-1 Diversity of Uses, Livingston Town Centre (January 2025)

| Livingston Town Centre – Diversity of Uses |              |                  |            |                   |                |            |
|--|--------------|------------------|------------|-------------------|----------------|------------|
| Category                                   | No. of units | % of total units | UK (%)     | Floorspace (sq.m) | Floorspace (%) | UK (%)     |
| Retail Services <sup>34</sup>              | 17           | 5.6              | 15.1       | 2,620             | 1.6            | 7.7        |
| Leisure Services <sup>35</sup>             | 37           | 12.2             | 19.2       | 7,460             | 4.6            | 14.0       |
| Comparison                                 | 184          | 60.7             | 33.0       | 88,570            | 54.8           | 37.1       |
| Convenience                                | 18           | 5.9              | 10.3       | 37,290            | 23.1           | 19.1       |
| Financial and Business <sup>36</sup>       | 12           | 4.0              | 5.9        | 1,940             | 1.2            | 4.6        |
| Miscellaneous <sup>37</sup>                | 0            | 0                | 1.0        | 0                 | 0              | 0.6        |
| Vacant <sup>38</sup>                       | 35           | 11.6             | 15.6       | 23,870            | 14.8           | 17.0       |
| <b>Total</b>                               | <b>303</b>   | <b>100</b>       | <b>100</b> | <b>161,750</b>    | <b>100</b>     | <b>100</b> |

Source: Experian Goad (updated by Stantec January 2025). Goad UK averages: August 2024. Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.2.6 Some 60.7 per cent of units are occupied by comparison goods retailers, which equates to 54.8 per cent of all floorspace within the town centre, both of which are substantially higher than the UK average for all centres, of 33.0 per cent and 37.1 per cent, respectively. Livingston Town Centre is therefore very well represented in the comparison retail sector, which is no surprise considering it comprises a series of sizeable shopping centres/retail parks primarily selling comparison retail goods.
- 4.2.7 The Goad survey also provides detailed data for comparison retail sub-sectors, which shows that Livingston's representation is above the UK average for all centres (in terms of the proportion of units) in every comparison sub-sector besides 'car, motorcycles & motor accessories', 'florists and gardens' and 'charity shops, pets and other comparison'. These particular comparison goods are more commonly sold within large showrooms, at edge/out-of-centre locations and on the high street, the latter of which Livingston does not have. Livingston has the highest representation in the 'mixed and general clothing' (11.2 per cent of total units), 'sports, toys, cycles and hobbies' (7.6 per cent) and 'chemists, toiletries & opticians' (6.6 per cent) sub-sectors. It was noticeable during our visit that Livingston Designer Outlet had a good range of sportswear, outdoor clothing and equipment stores.
- 4.2.8 Our update of the Goad survey shows that a total of 5.9 per cent of units and 23.1 per cent of floorspace was in use by convenience retail operators, compared to UK average figures of 10.3 per cent and 19.1 per cent, respectively. The provision of convenience retail facilities therefore falls below the UK average for all centres in terms of the proportion of units but it is above the UK average in terms of the proportion of floorspace. The floorspace figure is

<sup>34</sup> Retail services comprise hairdressers, beauty parlours and health centres (Experian Goad code G3B), laundries and drycleaners (G3C) and travel agents (G3D).

<sup>35</sup> Leisure services comprise restaurants, cafés, coffee bars, fast food and takeaways (Experian Goad code G3A). As mentioned earlier in our report, numerous town centre uses are excluded from the Experian Goad based diversity of uses analysis, such as a number of leisure services including bars and wine bars; bingo and amusements; casinos and betting offices; cinemas, theatres and concert halls; clubs; disco, dance and nightclubs; hotels and guest houses; and public houses. As such, the proportion of leisure services within each of the study centres is higher than that recorded in the Diversity of Uses tables. However, we include qualitative descriptions of the excluded leisure services elsewhere in the health checks to ensure they are not overlooked.

<sup>36</sup> Financial and business services comprise banks and financial services (Experian Goad code G3E), building societies (G3F) and estate agents and auctioneers (G3G).

<sup>37</sup> Miscellaneous uses include employment, careers, Post Offices and information (Experian Goad code G4A).

<sup>38</sup> This includes all vacant retail / service units plus those under alteration (Experian Goad code G4B).

skewed by the extensive Asda superstore (16,590 sq.m) as well as large Sainsbury's and Morrisons foodstores at Almondvale South Retail Park (8,010 sq.m and 7,400 sq.m).

- 4.2.9 In each of the service sub-sectors (retail, leisure and financial & business), the proportions of units and floorspace are below the UK average for all centres. This is most evident within the retail service sub-sector, where the proportion of units (5.6 per cent) is roughly one-third the UK average for all centres (15.1 per cent). Livingston has no representation in the miscellaneous category.

### **Proportion of Vacant Property**

- 4.2.10 A total of 11.6 per cent of units within the town centre were vacant as of January 2025, which equates to 14.8 per cent of all floorspace, in both cases below the UK averages of 15.6 per cent and 17.0 per cent, respectively. The below-average vacancy rate is a sign that the centre is in good health. The most notable vacant unit is the former Debenhams store on the corner of Almondvale Boulevard and Almondvale Avenue, but we understand that it is being repurposed as an indoor leisure facility (go-karting, tenpin bowling and so on).

### **Retailer Representation**

- 4.2.11 All categories of comparison retail uses (national multiple retailers, independent retailers, designer outlet stores and large-format retail park uses) are catered for across The Centre Livingston, Livingston Designer Outlet and Livingston's various retail parks (Almondvale Retail Park, Almondvale West Retail Park and Almondvale South Retail Park). Whilst there are a few independent retailers, the overwhelming majority are national multiples. Through a discussion with a representative of the management team at the designer outlet, we understand that it is quite common for retailers to change units within the shopping centre itself and for unit sizes to be tailored to the individual needs of the retailers.
- 4.2.12 In terms of convenience retail, Livingston boasts several large-format foodstores (Aldi, Asda, Iceland, Morrisons, Sainsbury's) as well as other smaller specialist retailers (Holland & Barrett, Hotel Chocolat, Millie's Cookies and so on.). Livingston has a good range of chain restaurants, which tend to be located at The Elements (the latest extension to The Centre) and the ground and first floors of Livingston Designer Outlet (a food court is located on the first floor).

Figure 4-3 Chain restaurants at The Elements



Source: Stantec

## Leisure and Tourism Facilities

- 4.2.13 Livingston has a reasonable range of leisure facilities for a centre of its size, including a cinema (VUE), adventure golf (Paradise Island Adventure Golf), an indoor obstacle course (Aerial Adventures), betting offices (Ladbrokes and William Hill) and amusements (Admiral Casino and Carlton Clubs). Livingston is not well represented by drinking establishments, with only one public house (The NewYearField).
- 4.2.14 As we described above, the Goad definition of Livingston Town Centre is slightly different to the adopted town centre boundary and so some uses are excluded from the Goad plan. In terms of leisure facilities, Livingston also offers a skate park (Livingston Skate Park), a football stadium (Livingston Football Club's purpose-built stadium Home of the Set Fare Arena), a gym (PureGym Livingston) and an escape room (Escape Livingston).
- 4.2.15 In terms of tourism facilities, Livingston has one museum (The Wee Museum of Memory) and three hotels (Chain Runner by Marston's Inns, Mercure Livingston Hotel and Travelodge Livingston). The majority of visitors to Livingston, however, are attracted by the plentiful shopping opportunities afforded by Livingston Designer Outlet and The Centre Livingston. Livingston also boasts the main bus interchange in West Lothian.

## Evening/Night-time Economy

- 4.2.16 Livingston has a relatively poor evening/night-time economy offer, which is limited to the facilities described above. Aside from The NewYearField, Livingstone does not have any bars, nightclubs or theatres and concert halls, which are commonly found within traditional centres.

## Town Centre Environment

- 4.2.17 The physical structure of Livingston Town Centre is a direct result of the large purpose-built indoor shopping centres (The Centre Livingston and Livingston Designer Outlet) and the surrounding retail and business parks. The centre is unusual in that it does not have a traditional high street.
- 4.2.18 Both indoor shopping centres are of a high-quality design and provide for a pleasant shopping experience. Livingston Designer Outlet was rebranded in 2019 after undergoing a major £7 million refurbishment. The previously bold and colourful exterior was replaced by subtle and muted tones to give it a more modern and sophisticated appearance. The internal malls of the designer outlet are attractive and well-maintained, and the glass dome and central staircase provide a grand entrance.
- 4.2.19 The Centre Livingston was built in three phases, which is evident from both the external and internal appearance of the building. Almondvale Walk forms the eastern end of the shopping centre and is the original 1970s phase one development. Phase two – Almondvale Place – opened in 1995 and features two small towers at the centre's northern entrance. Almondvale Place forms the central part of the shopping centre. The Elements – situated at the western end of the shopping centre – opened in 2008 and is the latest addition to the centre, boasting a large glass atrium which creates a light and welcoming atmosphere and gives a sense of being outside yet still being indoors. The western end of The Centre is particularly attractive, with modern shop façades; however, the central and eastern zones are more dated and would benefit from being brought up to the same standard as The Elements. Nevertheless, the shopping centre is well-kept and was busy at the time of our visit (a Tuesday afternoon).

Figure 4-4 Inside The Centre Livingston



Source: Stantec

- 4.2.20 A number of the units at Almondvale West Retail Park have been reconfigured and altered, and the existing façades have been cladded to create a more attractive external frontage which complements that of the adjacent designer outlet. The other retail parks are more typical of mainstream edge/out-of-centre retail parks and do not positively contribute to the town centre environment. The road network and extensive parking associated with the shopping centres and retail parks detracts from the overall town centre environment; however, the multi-storey car park adjacent to Almondvale Boulevard is an example of an attractive car park.
- 4.2.21 Besides Livingston 'Livi' Skatepark – a Category B listed structure on the edge of the town centre – there are no notable heritage features within the centre. Given its composition as a

series of shopping centres and retail parks, the town centre is dominated by hard landscaping and there is almost a complete lack of greenery.

### **Accessibility and Pedestrian Flows**

- 4.2.22 Livingston Town Centre is highly accessible by road, being located just off Junction 3 of the M8 motorway which connects Glasgow and Edinburgh. Each of the shopping centres and retail/business parks are served by their own parking facilities, the former of which are served by both surface and multi-storey car parks.

Figure 4-5 Multi-storey car park serving The Centre Livingston



Source: Stantec

- 4.2.23 Livingston Bus Terminal is located between Livingston Designer Outlet and The Centre Livingston along Almondvale Avenue. The facility provides seven 'stances' (A-G), with services connecting the town centre to other areas within West Lothian and more distant destinations such as Glasgow, Edinburgh, Edinburgh Airport, Royal Infirmary of Edinburgh, Dunfermline and Lanark. The bus facilities are relatively basic; only stances E, F and G are served by bus shelters; however, Livingston Designer Outlet provides some protection from the elements for those passengers waiting at stances A-D. Livingston Town Centre is not well served by rail; the nearest railway stations are Livingston North and Livingston South, which are approximately 2.5km and 1.5km from the main retail area, respectively. Visitors would have to get a taxi from either station to the town centre.

Figure 4-6 Livingston Bus Terminal



Source: Stantec

- 4.2.24 The town centre – which primarily comprises a series of shopping centres and retail/business parks – was built with vehicles in mind and therefore lacks permeability for pedestrians. The road network which surrounds the shopping centres and retail parks is complicated and includes numerous roundabouts and the extensive surface car parks in and around the town centre make it difficult for pedestrians to negotiate. There are a couple of segregated pedestrian routes which provide access from the north and south, but they are not attractive routes. Pedestrian movement is uninhibited once in the shopping centres themselves, however.
- 4.2.25 We visited the town centre on a late Tuesday afternoon, and it was still relatively busy, particularly with school children who tended to congregate at the food court within the designer outlet or at the bus terminal.

### Summary

- 4.2.26 Overall, we consider Livingston Town Centre to be a healthy centre when measured against key indicators. It contains a substantial concentration of retail uses and is complemented by a range of chain restaurants. Almost two-thirds of the retail/service uses within the town centre are in comparison retail use, owing to the centre's composition, and all categories of comparison retail are catered for. Livingston is also well-served by national multiple convenience retailers and boasts the largest Asda superstore in the country. The town centre's vacancy rate is below the UK average for all centres, which is an obvious sign of health.
- 4.2.27 Livingston has a reasonable leisure offer but lacks an extensive evening/night-time economy given that its main focus is retail. The shopping centres themselves provide for a pleasant shopping experience but the town centre in general arguably lacks character and charm. Accessibility to the centre is excellent in terms of car and bus; however, it is located some distance from the nearest railway stations and is not overly conducive to walking/cycling. There is an abundance of parking spaces within the town centre and the centre itself was

relatively busy at the time of our visit, but we suspect that it is much busier on weekends and during school holidays.

### 4.3 Performance of Armadale Town Centre

- 4.3.1 In this section we assess the health of Armadale Town Centre, which is situated near the junction of West Main Street (A89), East Main Street, North Street and South Street (B8084).

#### Previous Findings

- 4.3.2 The previous retail study found that Armadale had a limited retail offer, which was concentrated along the main thoroughfare (East Main Street and West Main Street). The latter constituted the primary retail area and contained retail/service uses such as banks, cafés and hairdressers. The centre’s retail offer primarily comprised small-scale convenience retail with comparison retail limited to a number of household/discount operators. In terms of convenience retail, the town’s population was served by several small national operators as well as independent grocers and traditional convenience retailers (butchers, a baker and a confectioner). It was felt that Armadale could be enhanced in terms of buildings, public realm, cycling access, physical environment and leisure. The study noted that future large-scale housing development could drive up the quality of the town centre.

#### Diversity of Uses

- 4.3.3 Armadale Town Centre contains a total of 52 retail/service units. The diversity of uses present within the town centre in terms of the number and proportion of units is set out in Table 4-2, compared with the UK average for all centres. The full breakdown of uses can be found within Appendix A of the separate Appendices Volume.

Table 4-2 Diversity of Uses, Armadale Town Centre (January 2025)

| Armadale Town Centre – Diversity of Uses |              |                  |            |
|--|--------------|------------------|------------|
| Category                                 | No. of units | % of total units | UK (%)     |
| Retail Services                          | 11           | 21.2             | 15.1       |
| Leisure Services                         | 18           | 34.6             | 19.2       |
| Comparison                               | 9            | 17.3             | 33.0       |
| Convenience                              | 5            | 9.6              | 10.3       |
| Financial and Business                   | 1            | 1.9              | 5.9        |
| Miscellaneous                            | 0            | 0                | 1.0        |
| Vacant                                   | 8            | 15.4             | 15.6       |
| <b>Total</b>                             | <b>52</b>    | <b>100</b>       | <b>100</b> |

Source: Stantec survey. Goad UK averages: August 2024. Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.3.4 The proportion of comparison goods retailers present in Armadale Town Centre is roughly half the UK average for all centres. Most notably, there are no fashion or footwear operators within the town centre. Those comparison goods retailers that are represented fall into the following sub-sectors: ‘chemists, toiletries & opticians’, ‘furniture, carpets & textiles’, ‘booksellers, arts/crafts, stationers/copy bureaux’, ‘sports, toys, cycles and hobbies’ and ‘charity shops, pets and other comparison’.
- 4.3.5 The proportion of convenience goods retailers is broadly in line with the UK average for all centres (9.6 per cent versus 10.3 per cent). Armadale’s convenience retail offer includes two butchers (John Dewar & Sons and Hugh Black & Sons), a convenience store (Keystore More) and a grocery/frozen foodstore (Scotmid Co-op). Whilst an audit of facilities was not

undertaken as part of the previous study, it is evident from our foregoing commentary that the centre's convenience retail offer has declined over the last 16 years.

- 4.3.6 The proportion of retail services is higher than the UK average for all centres. All of the town centre's retail services fall into the *'hairdressers, beauty parlours & health centres'* sub-sector. Armadale appears to be well-represented in terms of leisure services; however, the overwhelming majority are hot-food takeaways.
- 4.3.7 The proportion of financial and business services in Armadale Town Centre is below the UK average for all centres, with just one estate agent (Sneddon & Son).
- 4.3.8 Armadale also contains a number of common town centre uses that are not included within Experian's Centre Report, including betting offices and bars as well as a veterinary surgery, a doctors' surgery, a dental surgery, a nursery a community centre, a public house, a function suite, an undertakers, a hotel and a dancing school. As such, although the town centre's retail/service offer is limited, the immediate residential catchment is well served by community facilities.

### **Proportion of Vacant Property**

- 4.3.9 A total of 15.4 per cent of units within the town centre are currently vacant, which is almost identical to the UK average for all centres (15.6 per cent). Despite the vacancy rate being similar to the UK average, the vacant units were quite prominent.

### **Retailer Representation**

- 4.3.10 Armadale Town Centre is not well-represented by national multiple retailers. Those that are present include Deans Pharmacy, Ladbrokes, William Hill, Scotmid Co-op and Semichem. There are very few actual shops within the town centre, and it is clear that the centre serves a very localised catchment. For this reason, we consider that Armadale is more akin to a local centre or small-scale district centre.

### **Leisure and Tourism Facilities**

- 4.3.11 Armadale Town Centre has a poor leisure offer which is largely limited to food and drink operators. The centre also has two betting offices and, whilst it used to have an indoor swimming pool (Xcite), the facility closed in 2023. Besides a hotel (Highlander Hotel) there are no other tourist facilities in the town centre.

### **Evening/Night-time Economy**

- 4.3.12 As with leisure and tourism, Armadale Town Centre has a poor evening and night-time economy offer. The centre has a high proportion of hot-food takeaways and only two restaurants (Amore and Virsa). In terms of drinking establishments, there are two bars (Coppie's Bar and Kross Bar), one bar/function suite (The Goth/Glendell Function Suite) and one public house (The Regal).

### **Town Centre Environment**

- 4.3.13 Armadale is an extremely low-grade centre. Whilst some of the retail/service uses are accommodated within traditional stone buildings, the majority of retail frontages are poor quality and require improvement. Most of the hot-food takeaways are shut until the late afternoon/early evening, which gives the impression that unit vacancy is higher than it already is. There are multiple instances where residential units break up otherwise continuous retail frontages, which creates 'dead' frontages. The overall streetscape is bleak and uninspiring.

Figure 4-7 Armadale's town centre environment



Source: Stantec

4.3.14 The only building with any sort of architectural merit / heritage significance is The Goth, which features a large clocktower.

Figure 4-8 The Goth (right)



Source: Stantec

## Accessibility and Pedestrian Flows

- 4.3.15 Armadale Town Centre is well served by the local road network and is a short distance from the M8 motorway. Short-stay and disabled parking is available along the main thoroughfare and there is ample parking on surrounding residential streets. A free car park is also located off North Street.
- 4.3.16 There are numerous bus stops located within the town centre with services to Avonbridge, Bathgate, Blackridge, Boghall, Deans (Livingston), Edinburgh, Falkirk and Whitburn. Armadale (West Lothian) Railway Station is inconveniently located at the southern extent of the built-up area of Armadale and is approximately a 30-minute walk from the town centre; however, the 6 and X18 bus services stop outside the station.
- 4.3.17 Pedestrian access to the town centre is very good from the surrounding residential areas. South Street has quite a steep gradient, which could deter the elderly and mobility impaired from accessing its retail/service units.

## Summary

- 4.3.18 Overall, we consider Armadale to be an extremely low-grade centre with a limited retail offer, a high proportion of hot-food takeaways but very few actual shops. The centre clearly serves a very localised catchment and we therefore consider it to be more akin to a local centre or a small-scale district centre.

## 4.4 Performance of Bathgate Town Centre

- 4.4.1 We next assess the health of Bathgate Town Centre, which is the second largest settlement in West Lothian after Livingston. The majority of retail activity is concentrated along George Street, Hopetoun Street and North Bridge Street.

## Previous Findings

- 4.4.2 The previous retail study found that George Street and Hopetoun Street offered a range of comparison and retail service uses; however, the quality of retail on George Street was poor for a high street. The study reported a high proportion of vacant units and charity shops within the town centre. In terms of convenience retail, a large Tesco foodstore was located on the edge of the town centre and there were a number of smaller national retailers present such as Spar and Keystore, as well as Aldi and Lidl. These foodstores were supported by a range of local grocers and traditional convenience retailers (butchers, bakers, fishmongers, greengrocers and a delicatessen). The town centre's facilities were generally rated excellent, good or acceptable with the exception of cycling facilities, which were rated poor. The author felt there was scope to improve facilities for mobility-impaired users, the condition of buildings, information availability and leisure facilities.

## Diversity of Uses

- 4.4.3 Bathgate Town Centre contains a total of 175 retail/service units, with a combined floorspace of 33,690 sq.m gross. The diversity of uses present within the town centre in terms of the number and proportion of units and floorspace is set out in Table 4-3, compared with the Goad UK average for all of the c.1,950 centres and shopping locations covered by Experian. The full breakdown of uses can be found within Appendix A of the separate Appendices Volume.

Table 4-3 Diversity of Uses, Bathgate Town Centre (January 2025)

| Bathgate Town Centre – Diversity of Uses |              |                  |            |                   |                |            |
|--|--------------|------------------|------------|-------------------|----------------|------------|
| Category                                 | No. of units | % of total units | UK (%)     | Floorspace (sq.m) | Floorspace (%) | UK (%)     |
| Retail Services                          | 46           | 26.3             | 15.1       | 4,290             | 12.7           | 7.7        |
| Leisure Services                         | 35           | 20.0             | 19.2       | 4,160             | 12.4           | 14.0       |
| Comparison                               | 42           | 24.0             | 33.0       | 13,370            | 39.7           | 37.1       |
| Convenience                              | 17           | 9.7              | 10.3       | 6,730             | 20.0           | 19.1       |
| Financial and Business                   | 13           | 7.4              | 5.9        | 1,160             | 3.4            | 4.6        |
| Miscellaneous                            | 1            | 0.6              | 1.0        | 150               | 0.5            | 0.6        |
| Vacant                                   | 21           | 12.0             | 15.6       | 3,830             | 11.4           | 17.0       |
| <b>Total</b>                             | <b>175</b>   | <b>100</b>       | <b>100</b> | <b>33,690</b>     | <b>100</b>     | <b>100</b> |

Source: Experian Goad (updated by Stantec January 2025). Goad UK averages: August 2024. Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.4.4 The proportion of retail services recorded in Bathgate Town Centre (26.3 per cent) is significantly above the UK average for all centres (15.1 per cent). Retail services account for 12.7 per cent of floorspace in the town centre, which is also higher than the UK average for all centres (7.7 per cent). The town centre hosts a range of hairdressers, barber shops, beauty salons, tattooists, health clubs and launderettes as well as a solarium and a natural therapist.
- 4.4.5 Leisure services account for 20.0 per cent of town centre units and 12.4 per cent of total floorspace, both broadly in line with the UK average for all centres. Unlike Armadale, Bathgate has a greater range of eateries including cafés/coffee shops, sandwich bars, restaurants, hot-food takeaways and a drive-thru restaurant.
- 4.4.6 The proportion of units in comparison retail use (24.0 per cent) is significantly below the UK average for all centres (33.0 per cent); however, comparison retail units account for 39.7 per cent of floorspace, which is slightly above the UK average for all centres (37.1 per cent). The floorspace figure is skewed by several large household goods and furniture stores (B&M Home Store, Home Bargains, N&P Flooring and The Original Factory Shop) in the southern part of the town centre, which are commonly found within retail parks in edge/out-of-centre locations. The majority of comparison retailers fall into the following sub-sectors: *‘chemists, toiletries & opticians’*, *‘charity shops, pets and other comparison’*, *‘furniture, carpets & textiles’* and *‘DIY, hardware & household goods’*. Bathgate has a poor fashion retail offer with only four units falling into the various clothing and footwear sub-sectors.
- 4.4.7 The proportion of convenience retailers recorded in Bathgate Town Centre (9.7 per cent) is similar to the UK average for all centres (10.3 per cent), as is the proportion of floorspace occupied by convenience retail units (20.0 per cent versus 19.1 per cent nationally). The units within the *‘grocery and frozen foods’* sub-sector are Aldi, Farmfoods, Iceland and Lidl, which are accompanied by a range of smaller convenience stores as well as traditional convenience retailers such as bakers, butchers and fishmongers.
- 4.4.8 The proportion of financial and business services (7.4 per cent) is slightly above the UK average for all centres (5.9 per cent), whilst the proportion of floorspace in that sub-sector (3.4 per cent) is slightly below the UK average for all centres (4.6 per cent). Bathgate’s financial and business services include a bank, estate agents, surveyors, letting agents and pawnbrokers.
- 4.4.9 Bathgate Town Centre has one unit which falls into the miscellaneous category, namely a Post Office.

## Proportion of Vacant Property

- 4.4.10 A total of 12.0 per cent of units within the town centre are currently vacant, which equates to 11.4 per cent of all floorspace. This compares to UK averages of 15.6 per cent and 17.0 per cent, respectively. Whilst the vacancy rate in Bathgate Town Centre is below the UK average for all centres both in terms of the proportion of units and floorspace, for the reasons that we explain elsewhere in this section of the report we do not consider Bathgate to be a particularly healthy centre.

Figure 4-9 Vacant units along Hopetoun Street



Source: Stantec

## Retailer Representation

- 4.4.11 Whilst the town centre has a number of notable high street names including Argos, B&M Home Store, Boots, Card Factory, Homes Bargains, Pep & Co, Poundland, Specsavers and WHSmith, most of them tend to cater for the lower end of the market and there is a noticeable lack of higher-quality retailers. The centre also contains several charity shops including Barnardo's, British Heart Foundation and Marie Curie Cancer Care. Bathgate has two children's clothing stores (Kiddie Couture and Kidz Eco), a men's clothing shop (Nautica) and a lingerie shop (The Personal Touch).
- 4.4.12 Bathgate is represented by a number of national convenience multiples including Aldi, Farmfoods, Food Plus, Greggs, Iceland, Lidl, Londis and Spar as well as some smaller independents.
- 4.4.13 The town centre contains a number of national multiple food and drink outlets including Costa, Domino's Pizza, McDonald's, Pere's Piri Piri, Pizza Hut Delivery and Subway, but no chain restaurants. The town centre does, however, have a good range of independent restaurants catering for different cuisines (American, Asian, Chinese, Indian, Italian and Mexican).

## Leisure and Tourism Facilities

- 4.4.14 Bathgate Town Centre has a fairly poor leisure offer limited to public houses (Railway Tavern, The Ballencrieff, The Livery, The Royal and West Port Tavern), bars (Elixir and NineteenTwelve), bars & restaurants (Hopetoun Bar & Bistro, and Rasul), nightclubs

(Dreadnoughtrock and Midnight Breakfast Club) and amusements and betting offices (Ladbrokes, Leisureland, Paddy Power and William Hill).

- 4.4.15 The town centre has two hotels (The Fairway Hotel and The Balbairdie Hotel), albeit the centre itself is not a tourist destination and it mainly serves a localised catchment with dense residential accommodation close to the centre.

### Evening/Night-time Economy

- 4.4.16 The town centre has a reasonable evening and night-time economy offer for a centre of its size, predominantly limited to independent restaurants, hot-food takeaways and drinking establishments. As we noted above, we expect that this offer mainly serves residents living within the immediate catchment as opposed to those from further afield.

### Town Centre Environment

- 4.4.17 Bathgate is a low-grade and unattractive centre. George Street – the principal shopping street – is a wide, pedestrianised street that is dominated by hard landscaping and has a rather bleak feel to it. A number of the buildings along George Street are dated and require upgrading. Whilst George Street has a good range of street furniture including benches, planters, refuse bins, signage and lighting, it lacks footfall and activity. St David’s Church – which previously accommodated the independent Bathgate Cinema – was bought by Centre Point Church in early 2024 and is set to be restored as a church for the local community. At the southern end of George Street is George Place, a relatively large public space surrounded by eateries (a bakery, a café, a coffee shop, a sandwich bar and a hot-food takeaway). Some seating is available, but more could be done to make this an attractive place where people choose to meet and dwell.

Figure 4-10 George Street (top left and right and bottom right) and George Place (bottom left)



Source: Stantec

- 4.4.18 The rest of the town centre is not particularly appealing either and some of the vacant units are dilapidated, which has a negative impact on the overall town centre environment.

Figure 4-11 North Bridge Street / Hopetoun Street (left) and Whitburn Road (right)



Source: Stantec

### **Accessibility and Pedestrian Flows**

- 4.4.19 Bathgate is easily accessible by car and there is plentiful free car parking within the town centre. The majority of bus stops are located along the A89 to the south of the core retail area, providing services between Bathgate and Blackburn, Blackridge, Boghall, Broxburn, Deans, Edinburgh, Glenmavis, Kirknewton, Livingston and Whitburn. Bathgate Railway Station is located within the south-eastern part of the town centre and provides frequent services to Edinburgh, Milngavie and Helensburgh Central. There is ample car and cycle parking at the railway station as well as a taxi rank. Pedestrian accessibility from the surrounding residential areas is good, as is pedestrian movement within the town centre. We visited the centre on a weekday morning, and it was noticeably quiet.

### **Summary**

- 4.4.20 Overall, we do not consider Bathgate to be a particularly healthy centre. Considering it is the second largest settlement in West Lothian after Livingston, the centre has a poor range of comparison retail uses and only four fashion and footwear operators. Moreover, most of the national multiple comparison retailers tend to cater for the lower end of the market. Whilst the vacancy rate is below the UK average for all centres, some of the vacant units are in a state of disrepair and have a negative impact on the overall town centre environment. Bathgate's leisure offer appears to serve a mainly localised catchment and whilst public transport accessibility to the town centre is very good, the centre lacked footfall and vibrancy.

## **4.5 Performance of Broxburn/Uphall Town Centre**

- 4.5.1 Despite 'Broxburn/Uphall' being described as one of West Lothian's five traditional town centres within the Local Development Plan, it effectively functions as two separate retail

centres with Broxburn more akin to a district centre and Uphall more comparable to a local centre. Both are linear centres that are located along the A899 approximately 2km apart. For the purposes of this performance analysis, however, we largely cover both centres together.

### Previous Findings

- 4.5.2 The previous retail study did not assess the health of Uphall, reporting only on Broxburn. It was reported that retail uses were concentrated along East Main Street, and the centre's offer included small-scale convenience and comparison retail uses and key services. Argyle Court – which consists of nine retail units located around a central car park – was located at the easternmost extent of the centre. Further retail provision was found along Greendykes Road, where a Lidl foodstore was located. Other convenience retail provision included Somerfield, independent/local grocers and traditional convenience retailers including butchers, bakeries and a fishmonger. Broxburn contained a mix of independent and national multiple retailers and a number of large vacancies on the main shopping street.

Figure 4-12 Argyle Court



Source: Stantec

### Diversity of Uses

- 4.5.3 Given that a Goad plan does not exist for Uphall, we report on each centre's diversity of uses separately.
- 4.5.4 Broxburn contains a total of 84 retail/service units, with a combined floorspace of 11,990 sq.m gross. The diversity of uses present within the town centre in terms of the number and proportion of units and floorspace is set out in Table 4-4, compared with the Goad UK average for all of the c.1,950 centres and shopping locations covered by Experian. The full breakdown of uses can be found within Appendix A of the separate Appendices Volume.

Table 4-4 Diversity of Uses, Broxburn Town Centre (January 2025)

| Broxburn Town Centre – Diversity of Uses |              |                  |            |                   |                |            |
|--|--------------|------------------|------------|-------------------|----------------|------------|
| Category                                 | No. of units | % of total units | UK (%)     | Floorspace (sq.m) | Floorspace (%) | UK (%)     |
| Retail Services                          | 26           | 31.0             | 15.1       | 1,580             | 13.2           | 7.7        |
| Leisure Services                         | 15           | 17.9             | 19.2       | 1,950             | 16.3           | 14.0       |
| Comparison                               | 25           | 29.8             | 33.0       | 5,590             | 46.6           | 37.1       |
| Convenience                              | 8            | 9.5              | 10.3       | 1,680             | 14.0           | 19.1       |
| Financial and Business                   | 2            | 2.4              | 5.9        | 130               | 1.1            | 4.6        |
| Miscellaneous                            | 1            | 1.2              | 1.0        | 250               | 2.1            | 0.6        |
| Vacant                                   | 7            | 8.3              | 15.6       | 810               | 6.8            | 17.0       |
| <b>Total</b>                             | <b>84</b>    | <b>100</b>       | <b>100</b> | <b>11,990</b>     | <b>100</b>     | <b>100</b> |

Source: Experian Goad (updated by Stantec January 2025). Goad UK averages: August 2024. Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.5.5 The proportion of comparison goods retailers present in Broxburn is below the UK average for all centres (29.8 per cent versus 33.0 per cent); however, the proportion of floorspace is significantly above the UK average for all centres (46.6 per cent versus 37.1 per cent), which reflects the generally large nature of units. The most prevalent comparison retail sub-sectors in Broxburn are: *'DIY, hardware & household goods'*, *'chemists, toiletries & opticians'*, *'charity shops, pets and other comparison'* and *'jewellers, clocks & repair'*.
- 4.5.6 The proportion of convenience goods retailers is below the UK average for all centres (9.5 per cent versus 10.3 per cent), as is the proportion of floorspace (14.0 per cent versus 19.1 per cent). Broxburn contains one grocery/frozen foods store and four convenience stores as well as a butchers, fishmongers and confectioners. A Lidl store is located approximately 600m to the east of Broxburn, alongside a Home Bargains store.
- 4.5.7 Retail services account for nearly a third of all units (31.0 per cent), which is more than double the UK average for all centres (15.1 per cent), and the proportion of floorspace (13.2 per cent) is roughly double the UK average for all centres (7.7 per cent). All of Broxburn's retail services fall into the *'hairdressers, beauty parlours & health centres'* sub-sector.
- 4.5.8 The proportion of leisure services (17.9 per cent) is broadly in line with the UK average for all centres (19.2 per cent), as is the proportion of floorspace (16.3 per cent versus 14.0 per cent). Broxburn's leisure services include two cafés, three restaurants and ten hot-food takeaways.
- 4.5.9 The proportion of financial and business services (2.4 per cent) is below the UK average for all centres (5.9 per cent), as is the proportion of floorspace (1.1 per cent versus 4.6 per cent). Broxburn has one estate agents (KnightBain) and one insurance company (Integrity Insurance).
- 4.5.10 Broxburn has one unit which falls into the miscellaneous category (Post Office). This provision is broadly in line with the UK average for all centres both in terms of the proportion of units and floorspace.
- 4.5.11 Uphall contains a total of 22 retail/service units. The diversity of uses present within the centre in terms of the number and proportion of units is set out in Table 4-5, compared with the UK average for all centres. The full breakdown of uses can be found within Appendix A of the separate Appendices Volume.

Table 4-5 Diversity of Uses, Uphall Town Centre (January 2025)

| <b>Uphall Town Centre – Diversity of Uses</b> |                     |                         |               |
|---|---------------------|-------------------------|---------------|
| <b>Category</b>                               | <b>No. of units</b> | <b>% of total units</b> | <b>UK (%)</b> |
| Retail Services                               | 7                   | 31.8                    | 15.1          |
| Leisure Services                              | 5                   | 22.7                    | 19.2          |
| Comparison                                    | 3                   | 13.6                    | 33.0          |
| Convenience                                   | 3                   | 13.6                    | 10.3          |
| Financial and Business                        | 0                   | 0                       | 5.9           |
| Miscellaneous                                 | 1                   | 4.6                     | 1.0           |
| Vacant  | 3                   | 13.6                    | 15.6          |
| <b>Total</b>                                  | <b>22</b>           | <b>100</b>              | <b>100</b>    |

Source: Stantec survey. Goad UK averages: August 2024. Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.5.12 The proportion of comparison goods retailers in Uphall is significantly below the UK average for all centres, but caution should be exercised when interpreting the figures in the diversity of uses table given the relatively small number of units across the centre. Those comparison goods retailers that are present include two fitted furniture stores (a kitchen/bathroom showroom and a flooring shop) and a pharmacy.
- 4.5.13 The proportion of convenience goods retailers is slightly above the UK average for all centres (13.6 per cent versus 10.3 per cent). Uphall has a convenience store (Day-Today), a grocery/frozen food store (Scotmid Co-op) and a butchers (John Lawson Butchers & Delicatessen).
- 4.5.14 The proportion of retail services (31.8 per cent) is more than double the UK average for all centres (15.1 per cent). All of the retail services fall into the *'hairdressers, beauty parlours & health centres'* sub-sector.
- 4.5.15 The proportion of leisure services (22.7 per cent) is slightly above the UK average for all centres (19.2 per cent). Uphall has a café, two Italian restaurants and two hot-food takeaways.
- 4.5.16 Uphall has no units in financial and business use and one unit falling into the miscellaneous category (Uphall Post Office).
- 4.5.17 Uphall also contains a number of common town centre uses that are not included within Experian's Centre Report, including a public house (Dovehill Arms), a betting office (William Hill), a hotel (The Oatridge Hotel & Restaurant), two car dealerships (Applecross Motor Company and Arnold Clark) and various health and medical services (Autumn Colonics, Dental No.9 Practice, Every Step Podiatry and West Lothian Chiropractic).

### **Proportion of Vacant Property**

- 4.5.18 A total of 8.3 per cent of Broxburn's units are currently vacant, which equates to 6.8 per cent of all floorspace. This compares to UK averages of 15.6 per cent and 17.0 per cent, respectively.
- 4.5.19 In Uphall, 12.5 per cent of all units are vacant, roughly three percentage points below the UK average for all centres.
- 4.5.20 The level of unit vacancy indicates that Broxburn/Uphall Town Centre is in good health.

## **Retailer Representation**

- 4.5.21 The vast majority of comparison goods retailers in Broxburn are independent retailers. Notable exceptions include B&M Bargains, Boots, Poundland and Semichem. In terms of national multiple convenience retailers, Broxburn has a Scotmid Co-op, Food Plus and USave. All but one of Broxburn's leisure services are independently owned (the exception being Pepe's Piri Piri).
- 4.5.22 The vast majority of retail/service uses in Uphall are independently owned. Notable exceptions include Day-Today and Scotmid Co-op.
- 4.5.23 As demonstrated above, Broxburn/Uphall Town Centre is predominantly occupied by independent retailers, perhaps due to its proximity to Livingston Town Centre, which has an excellent range of national multiple retailers across all categories of comparison retail uses.

## **Leisure and Tourism Facilities**

- 4.5.24 Broxburn/Uphall Town Centre's leisure offer is largely limited to food and drink operators with the exception of a couple of betting offices. The centre's only tourist facility is a hotel located in Uphall.

## **Evening/Night-time Economy**

- 4.5.25 As noted above above, Broxburn/Uphall's evening/night-time economy offer is limited to food and drink operators. It is clear that the town centre serves a localised catchment.

## **Town Centre Environment**

- 4.5.26 The town centre environment in Uphall is more pleasant than it is in Broxburn despite them both being situated along the A899. The buildings are generally more attractive and shop frontages are in better condition. Despite being a linear centre, Broxburn has a 'cramped' feel to it with lots of retail units crammed into quite a small stretch of road, with narrow footways cluttered with street furniture and refuse bins, on-street parking on both sides and heavy flows of traffic. Some of the vacant units in Broxburn are an eyesore and have a negative impact on the overall town centre environment. Argyle Court is dated and would benefit from complete redevelopment. Broxburn in particular is surrounded by dense, poor quality residential development.

Figure 4-13 Broxburn's town centre environment



Source: Stantec

- 4.5.27 In terms of the historic environment, there are attractive churches at either end of Broxburn, one used as a funeral director. A church is located at the eastern end of Uphall.

### **Accessibility and Pedestrian Flows**

- 4.5.28 Broxburn/Uphall Town Centre is easily accessible by car, being located a short distance from Junction 3 of the M8. The centre is well-connected to the local road network and has on-street and disabled parking available.
- 4.5.29 In Broxburn, there is a 90-minute maximum stay car park at Argyle Court, and Greendykes Road car park has 99 parking spaces. There are also customer car parks associated with B&M Bargains and Scotmid Co-op.
- 4.5.30 There are numerous bus stops located along the A899 with regular services to places including Bathgate, Whitburn, Livingston, Edinburgh, Edinburgh Airport and Glasgow.
- 4.5.31 Uphall Railway Station is located on the other side of the M8 motorway and is a 5-minute drive or 20-minute walk from Uphall, and a 7-minute drive or 50-minute walk from Broxburn. There are, however, several bus services that operate between the railway station and the town centre.
- 4.5.32 Broxburn and Uphall are each easily accessible by foot from the surrounding residential neighbourhoods. It is, however, a 30-minute walk between the two and therefore residents will most likely opt for the bus (72 or X18 bus services).
- 4.5.33 Pedestrian activity was low during our visit; however, the A899 was heavily congested.

Figure 4-14 Heavily congested A899



Source: Stantec

## Summary

- 4.5.34 Overall, we consider Broxburn/Uphall to be a fairly healthy centre insofar as it serves a localised catchment. As mentioned earlier, however, despite 'Broxburn/Uphall' being described within the Local Development Plan as one of West Lothian's five traditional town centres, it effectively performs as two separate retail centres with Broxburn functioning as a district centre and Uphall more akin to a local centre.
- 4.5.35 Whilst the proportion of comparison retail uses within Broxburn/Uphall is below the UK average for all centres, we consider that the range of comparison retailers is sufficient for a centre of its size. Furthermore, we suspect that many residents will visit nearby Livingston for the majority of their comparison retail needs. In terms of convenience retail, the town's offer primarily caters for residents' top-up shopping needs. The town's complement of hairdressers, beauty parlours and health centres is substantially above the UK average, and it does not have any representation in the other retail service sub-sectors (laundries & drycleaners and travel agents).
- 4.5.36 The proportion of vacant property within the town centre is below the UK average for all centres, which is typically a sign of good health. The town's leisure and evening/night-time economy offers are generally limited to food and drink operators; however, this is not unusual for a centre which predominantly caters for a localised catchment. The town centre environment in Broxburn is poor and needs attention, and Argyle Court would benefit from complete re-development. Broxburn/Uphall was quiet during our visit, in terms of pedestrian flows, but there were constant flows of traffic along the A899.

## 4.6 Performance of Linlithgow Town Centre

- 4.6.1 Unlike the other study centres we have assessed so far, Linlithgow is located closer to the M9 motorway than it is the M8 motorway. Linlithgow is primarily a linear centre, albeit the eastern end of the centre contains a cluster of uses around Highport and Blackness Road.

## Previous Findings

- 4.6.2 The previous study found that Linlithgow was the second largest retail centre in West Lothian after Livingston, with approximately 13,500 sq.m of retail floorspace primarily concentrated along the traditional high street. The report noted that the town centre features a number of historic buildings which enhance the general streetscape but provide little scope for larger retailers or expansion. The centre was found to be dominated by independent retailers, both comparison and convenience, and retail services. Regent Centre – a small collection of shops located around a pedestrianised square – was located at the eastern end of Linlithgow, anchored by a Tesco foodstore. The town centre was a popular tourist destination given its proximity to Linlithgow Loch and Linlithgow Palace and contained a number of specialist retailers that are attractive to tourists. The facilities in Linlithgow were generally rated as excellent or good with the exception of cycling and facilities for mobility-impaired visitors.

Figure 4-15 Regent Centre, eastern end of Linlithgow



Source: Stantec

## Diversity of Uses

- 4.6.3 Linlithgow Town Centre currently contains a total of 112 retail/service units, with a combined floorspace of 12,600 sq.m gross. The diversity of uses present within the town centre in terms of the number and proportion of units and floorspace is set out in Table 4-6, compared with the Goad UK average for all of the c.1,950 centres and shopping locations covered by Experian. The full breakdown of uses can be found within Appendix A of the separate Appendices Volume.

Table 4-6 Diversity of Uses, Linlithgow Town Centre (January 2025)

| Linlithgow Town Centre – Diversity of Uses |              |                  |            |                   |                |            |
|--|--------------|------------------|------------|-------------------|----------------|------------|
| Category                                   | No. of units | % of total units | UK (%)     | Floorspace (sq.m) | Floorspace (%) | UK (%)     |
| Retail Services                            | 25           | 22.3             | 15.1       | 1,740             | 13.8           | 7.7        |
| Leisure Services                           | 22           | 19.6             | 19.2       | 2,190             | 17.4           | 14.0       |
| Comparison                                 | 41           | 36.6             | 33.0       | 3,730             | 29.6           | 37.1       |
| Convenience                                | 12           | 10.7             | 10.3       | 3,260             | 25.9           | 19.1       |
| Financial and Business                     | 5            | 4.5              | 5.9        | 760               | 6.0            | 4.6        |
| Miscellaneous                              | 1            | 0.9              | 1.0        | 100               | 0.8            | 0.6        |
| Vacant                                     | 6            | 5.4              | 15.6       | 820               | 6.5            | 17.0       |
| <b>Total</b>                               | <b>112</b>   | <b>100</b>       | <b>100</b> | <b>12,600</b>     | <b>100</b>     | <b>100</b> |

Source: Experian Goad (updated by Stantec January 2025). Goad UK averages: August 2024. Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

- 4.6.4 The proportion of comparison retail units (36.6 per cent) is slightly above the UK average for all centres (33.0 per cent), whereas the proportion of floorspace in comparison retail use (29.6 per cent) is significantly below the UK average for all centres (37.1 per cent), reflecting the centre's historic structure and small size of the retail units along High Street. Linlithgow has a good representation across the individual comparison retail sub-sectors; the only ones with no representation are *'men's & boys' wear'* and *'variety, department & catalogue showrooms'*.
- 4.6.5 The proportion of convenience retail units (10.7 per cent) is in line with the UK average for all centres (10.3 per cent), and the proportion of floorspace (25.9 per cent) is above the UK average for all centres (19.1 per cent). The above average floorspace figure is primarily due to the reasonably large Tesco foodstore at Regent Centre (2,360 sq.m). Besides Tesco, Linlithgow has three bakeries, a butcher, a greengrocer, a health foodstore, a convenience store, two off licences and a vape shop.
- 4.6.6 Retail services account for over a fifth of the total units (22.3 per cent), which is significantly above the UK average for all centres (15.1 per cent). Similarly, the proportion of floorspace occupied by retail services (13.8 per cent) is almost double the UK average for all centres (7.7 per cent). Linlithgow has 23 units which fall into the *'hairdressers, beauty parlours & health centres'* sub-sector and only one unit in each of the other retail services sub-sectors (laundries & drycleaners, and travel agents).
- 4.6.7 The proportion of leisure services (19.6 per cent) is almost identical to the UK average for all centres (19.2 per cent), whilst the proportion of floorspace occupied by leisure services (17.4 per cent) is slightly above the UK average (14.0 per cent). The range of leisure services in Linlithgow is noticeably different than in the other study centres. Linlithgow has a range of cafés, tearooms, coffee shops, sandwich bars and restaurants but only three hot-food takeaways (two of which are fish & chips). The town centre also boasts an ice-cream parlour.
- 4.6.8 The proportion of financial and business services is broadly in line with the UK average for all centres both in terms of the proportion of units and floorspace. Linlithgow has four estate agents as well as a bank.
- 4.6.9 Linlithgow has only one unit which falls into the miscellaneous category (a Post Office).

## **Proportion of Vacant Property**

- 4.6.10 A total of 5.4 per cent of units within the town centre are currently vacant, which equates to 6.5 per cent of all floorspace. This compares to UK averages of 15.6 per cent and 17.0 per cent, respectively. Linlithgow's vacancy rate is the lowest of all the study centres and the town centre is clearly in good health.

## **Retailer Representation**

- 4.6.11 Linlithgow's comparison retailers include card and gift shops (James Wilson, Lilypond Crafts & Gifts, Linlithgow Wishes and The Gift Horse), charity shops (British Red Cross, Cancer Research UK, Chest Heart & Stroke Scotland, Debra and Oxfam), chemists (Boots and Dears Pharmacy), clothing shops (Fair Trade Winds, Kapital Kilts, Purely Patchwork and Styled by Macs), opticians (Hendry Opticians and Specsavers) and shoe/shoe repair shops (2 Feet 1<sup>st</sup> and Timpson) as well as a toy shop (Bright Star Toys), a vinyl shop (Low Port Music), a haberdasher (The Thread Counter), a bookshop (Far from the Madding Crowd), a bridal shop (Bella), a pottery studio (Linlithgow Pottery), a picture framing shop (West End Gallery), a tile shop (Tile Studio), a DIY store (Linlithgow DIY), a wood stove shop (Linlithgow Stoves), a car spares shop (Autobits), a phone repair shop (Fone Unlocker) and an antique shop (Mid-C-Mod). As can be seen, the vast majority of comparison retailers are independently owned.
- 4.6.12 The only national multiple convenience retailers are Greggs, Morrisons Daily, Tesco and VPZ (vape shop). Similarly, the only chain food and drink outlets are Costa and Subway.

## **Leisure and Tourism Facilities**

- 4.6.13 In addition to the range of food and drink outlets referred to above, Linlithgow Town Centre has several public houses (Crown Arms Linlithgow, Old Post Office Bar, Platform 3, Swan Tavern Linlithgow, The Footballers & Cricketers Arms, The Four Marys), two bar/restaurants (Bar Leo and Café Bar 1807), two museums (Linlithgow Burgh Halls and The Line Gallery) as well as a library and community centre. Unlike the other study centres, Linlithgow does not have any betting offices. In terms of tourist facilities, Linlithgow has a hotel (Court Residence).

## **Evening/Night-time Economy**

- 4.6.14 Linlithgow has a relatively poor evening/night-time economy offer limited to restaurants, bar/restaurants and public houses, which could suggest that the majority of tourists are day visitors.

## **Town Centre Environment**

- 4.6.15 Linlithgow's town centre environment is generally very pleasant with traditional stone buildings, plentiful historic buildings and attractive shop frontages. The Vennel – a 1967 development of 90 houses in three distinct blocks with shops, a library and offices – is less attractive than the other buildings within the town centre and appears out-of-place. To the immediate east of The Vennel is The Cross, a grand civic space which features The Cross Well, which is a replica of a 1535 well and was made in 1807. The eastern end of the town centre is more attractive than the western end albeit the buildings along the westbound side of the carriageway are generally attractive throughout.

Figure 4-16 Linlithgow's town centre environment, The Cross (top right) and The Vennel (bottom left and right)



Source: Stantec

- 4.6.16 Linlithgow Loch and Linlithgow Palace are located to the north of the town centre and provide a tranquil space for residents and visitors to enjoy. They clearly attract visitors from outside the immediate area, as demonstrated by the relatively high proportion of cafés and several gift/speciality shops within the town centre.

Figure 4-17 Linlithgow Loch and Linlithgow Palace



Source: Stantec

- 4.6.17 As noted above, Linlithgow is an historic centre, and there is a heritage trail for those interested in the history and architecture of the town. The trail includes 49 features and buildings, most of which are indicated by a circular plaque. There are information panels giving more details at various points along the trail.

Figure 4-18 Various historic buildings in Linlithgow



Source: Stantec

## Accessibility and Pedestrian Flows

- 4.6.18 Linlithgow is easily accessible by car, being located between Junctions 3 and 4 of the M9 motorway. There is plentiful free car parking within the centre, both surface car parks and on-street car parking. The town centre also boasts a train station, which can be accessed from Station Road just off High Street. Linlithgow Station provides regular services to Dunblane, Edinburgh and Glasgow Queen Street.
- 4.6.19 There are numerous bus stops located along High Street with regular services to Bathgate, Bo'ness, Edinburgh, Falkirk, Livingston, Maddiston and Springfield.
- 4.6.20 Pedestrian accessibility from the surrounding residential areas is relatively good. The railway somewhat impedes access from the south; however, there are a couple of segregated pedestrian routes (in the form of a footbridge and an underpass) which provide access across the railway line as well as an underbridge linking Royal Terrace and Union Road.
- 4.6.21 Whilst the town centre did not appear overly busy during our visit, the car parks were near capacity, and there were people eating and drinking within the cafés.

## Summary

- 4.6.22 Overall, we consider Linlithgow to be a healthy centre. The vast majority of retail and service uses are independently owned, which sets the centre apart from Livingston and the other traditional town centres within West Lothian. It is clear that the town attracts visitors from outside the immediate area and the retail/service offer reflects this. There is a good range of cafés, tearooms, coffee shops, sandwich bars and restaurants as well as several gift/speciality shops. The town centre's vacancy rate is around one-third of the UK average for all centres, which is a clear sign that the centre is performing well. Linlithgow has a fairly limited evening/night-time economy offer; however, its restaurants and public houses appear highly rated. The town centre environment would greatly benefit from The Vennel undergoing

cosmetic improvements so that it is more in-keeping with the rest of the buildings within the town centre, whilst also improving the setting of the loch and the palace.

## 4.7 Performance of Whitburn Town Centre

4.7.1 Whitburn is a linear centre which is concentrated along West Main Street. Retail activity also extends a short distance along East Main Street and Market Place.

### Previous Findings

4.7.2 The previous study found that retail activity was concentrated along West Main Street with East Main Street and Market Place serving as secondary retail locations. The centre lacked a quality convenience retail offer for its size with a mix of small national local operators (Londis and Iceland) and independent grocers, as well as Lidl. It was felt that Whitburn could be enhanced in terms of buildings, public realm, cycling, environment and leisure.

### Diversity of Uses

4.7.3 Whitburn Town Centre currently contains a total of 97 retail/service units, with a combined floorspace of 10,900 sq.m gross. The diversity of uses present within the town centre in terms of the number and proportion of units and floorspace is set out in Table 4-7, compared with the Goad UK average for all of the c.1,950 centres and shopping locations covered by Experian. The full breakdown of uses can be found within Appendix A of the separate Appendices Volume.

Table 4-7 Diversity of Uses, Whitburn Town Centre (January 2025)

| Whitburn Town Centre – Diversity of Uses |              |                  |            |                   |                |            |
|--|--------------|------------------|------------|-------------------|----------------|------------|
| Category                                 | No. of units | % of total units | UK (%)     | Floorspace (sq.m) | Floorspace (%) | UK (%)     |
| Retail Services                          | 21           | 21.7             | 15.1       | 1,790             | 16.4           | 7.7        |
| Leisure Services                         | 25           | 25.8             | 19.2       | 2,780             | 25.5           | 14.0       |
| Comparison                               | 18           | 18.6             | 33.0       | 2,310             | 21.2           | 37.1       |
| Convenience                              | 19           | 19.6             | 10.3       | 2,950             | 27.1           | 19.1       |
| Financial and Business                   | 2            | 2.1              | 5.9        | 160               | 1.5            | 4.6        |
| Miscellaneous                            | 1            | 1.0              | 1.0        | 30                | 0.3            | 0.6        |
| Vacant                                   | 11           | 11.3             | 15.6       | 880               | 8.0            | 17.0       |
| <b>Total</b>                             | <b>97</b>    | <b>100</b>       | <b>100</b> | <b>10,900</b>     | <b>100</b>     | <b>100</b> |

Source: Experian Goad (updated by Stantec January 2025). Goad UK averages: August 2024. Some of the percentage totals might not sum exactly to 100 per cent due to rounding.

4.7.4 The proportion of comparison retail units (18.6 per cent) is significantly below the UK average for all centres (33.0 per cent), as is the proportion of floorspace (21.2 per cent versus 37.1 per cent). The comparison retail sub-sector with the greatest representation is '*chemists, toiletries & opticians*'.

4.7.5 The proportion of convenience retail units (19.6 per cent) is significantly above the UK average for all centres (10.3 per cent), as is the proportion of floorspace (27.1 per cent versus 19.1 per cent). The majority of convenience retailers (12 out of 19 units) fall into the '*CTN & convenience*' sub-category, with three of these units being vape shops. The previous retail study stated that Whitburn lacked a quality convenience retail offer and, despite our diversity of uses analysis demonstrating that the proportion of convenience retail units and floorspace

is significantly above the UK average for all centres, we still consider that the town lacks a good quality convenience retail offer.

- 4.7.6 Retail services account for approximately a fifth of town centre units (21.7 per cent) and 16.4 per cent of total floorspace. This is significantly above the UK average for all centres, both in terms of the proportion of units (15.1 per cent) and floorspace (7.7 per cent). All of the 21 units in retail service use fall into the *'hairstylists, beauty parlour & health centres'* sub-sector.
- 4.7.7 The proportion of leisure services (25.8 per cent) is also above the UK average for all centres (19.2 per cent), as is the proportion of floorspace (25.5 per cent versus 14.0 per cent). The majority of Whitburn's leisure services are hot-food takeaways. The town centre also has several cafés, sandwich/snack bars and restaurants.
- 4.7.8 The proportion of financial and business services is below the UK average for all centres both in terms of the proportion of units and floorspace. The proportion of miscellaneous uses is almost identical to the UK average for all centres in relation to both measures.

### **Proportion of Vacant Property**

- 4.7.9 A total of 11.3 per cent of units within the town centre are currently vacant, which equates to 8.0 per cent of all floorspace. This compares to UK averages of 15.6 per cent and 17.0 per cent, respectively. The vacant units are dispersed throughout the town centre.

### **Retailer Representation**

- 4.7.10 The vast majority of comparison retailers are independently owned, with the exception of Boots and Semichem. Whitburn has a very poor fashion offer; the only units which fall into the various fashion and footwear comparison goods sub-sectors are clothing alterations shops (one of which specialises in bridalwear alterations).
- 4.7.11 In terms of convenience retail, besides the 12 *'CTN & convenience'* stores, Whitburn has two bakers and one confectioners, two butchers, one frozen food store (Iceland) and a grocery store.
- 4.7.12 Besides Subway, all of Whitburn's food and drink outlets are independently owned.

### **Leisure and Tourism Facilities**

- 4.7.13 In addition to the food and drink operators mentioned above, Whitburn has several betting offices and amusements (Betfred, Ladbrokes, Pleasureland and William Hill), public houses (Cross Tavern, Olde Market Inn and The Double Five) and social clubs (Whitburn Bowling Club and Whitburn Junior F.C. Social Club) as well as a leisure centre (Xcite Whitburn), a community centre (Whitburn Partnership Centre) and a dancing school (West Lothian Danceworld). In terms of tourism facilities, Whitburn has a guest house (The Old Coach Inn).

### **Evening/Night-time Economy**

- 4.7.14 Whitburn has a reasonable evening/night-time economy offer for a centre of its size, albeit one that clearly serves a local catchment.

### **Town Centre Environment**

- 4.7.15 Whitburn is an exceptionally low-grade centre. The buildings lack uniformity, which creates a disorderly appearance and many of the units look tired and require upgrading. A number of the buildings are covered in pebble dash, which gives them a drab and dreary exterior. The eastern end of the centre contains a concentration of poor-quality mid-rise residential

accommodation, which creates a dead retail frontage. There are half a dozen or so retail/service units located at the base of the easternmost residential blocks, but a couple of these units lie vacant.

Figure 4-19 Whitburn's town centre environment



Source: Stantec

4.7.16 In an effort to improve the public realm, numerous benches and planters have been dotted along the high street; however, the general streetscape remains pretty bleak.

Figure 4-20 General streetscape



Source: Stantec

## Accessibility and Pedestrian Flows

- 4.7.17 Whitburn is easily accessible by car from the strategic road network, being located between Junctions 4 and 4a of the M8 motorway. The town is also well served by the local road network and there is plentiful on-street parking available along the high street as well as on the surrounding residential roads.
- 4.7.18 There are numerous bus stops located along the high street, which offer services to Avonbridge, Edinburgh, Fauldhouse, Kirkliston and Stane.
- 4.7.19 Whitburn does not have its own train station; the closest is Armadale (West Lothian) Railway Station, which is located approximately 2.3km to the north of the town centre. The X18 bus service – which runs every half hour – connects Whitburn Town Centre with the Asda foodstore that is adjacent to the railway station.
- 4.7.20 The town centre is easily accessible by foot from the surrounding residential areas and pedestrian accessibility within the town centre is good. The centre was relatively quiet during our visit, albeit that was on a weekday morning when pedestrian footfall is typically lower.

## Summary

- 4.7.21 Overall, we consider Whitburn to be an extremely low-grade centre that clearly serves a very localised catchment. There are a number of parallels between Whitburn and Armadale: both centres have a poor comparison retail offer, the majority of their leisure services are hot-food takeaways, all of their retail services fall into the '*hairdressers, beauty parlour & health centres*' sub-sector, they are poorly represented by national multiple retailers, their leisure and evening/night-time economy offers primarily serve a local catchment and their town centre environments are very poor. Given the above, we consider that Whitburn is akin to a poor-quality small district centre.

## 5 Current Retail Expenditure Patterns

### 5.1 Introduction

- 5.1.1 In this section we utilise the results from the household telephone survey to identify the current patterns of comparison and convenience retail spending by residents across the defined study area.

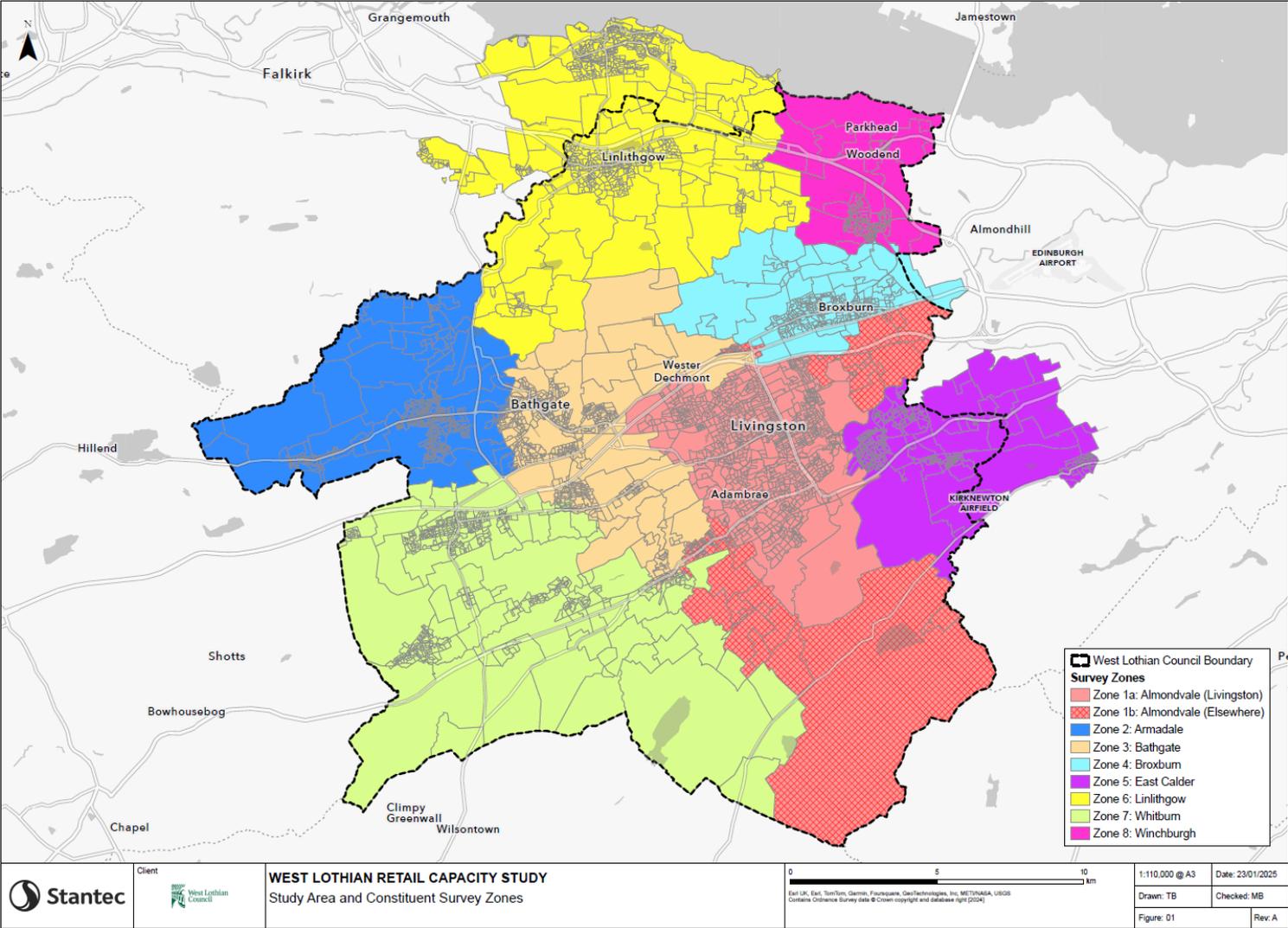
### 5.2 Household Survey Methodology

- 5.2.1 The last comprehensive Borough-wide survey of shopping patterns was undertaken in 2008, some 17 years ago, to inform the West Lothian Retail Capacity Study, which was published in November 2018. A new household telephone survey has therefore been undertaken as part of this study – conducted during January and February 2025 – to provide up-to-date evidence of current shopping expenditure patterns.

### 5.3 Study Area

- 5.3.1 The study area used for this Retail Study is shown on the plan within Appendix B of the Appendices Volume and in Figure 5-1 overleaf. The study area and constituent survey zones are based on the same list of postcodes used to define the 2008 study area. The latter, however, contained eight survey zones whereas the study area used for this Retail Study effectively comprises nine survey zones as Zone 1 has been split into Zone 1a: Almondvale (Livingston) and Zone 1b: Almondvale (Elsewhere).
- 5.3.2 West Lothian's administrative boundary coincides with the area covered by Survey Zones 1a, 1b, 2, 3, 7 and 8 whereas Zones 4, 5 and 6 lie partly outside of the administrative boundary. A total of 850 household survey interviews were achieved. As with all of our retail studies, we aimed for a minimum of 100 completed interviews in each of the study area zones. For West Lothian, we sought to achieve 100 completed interviews in Zones 2-8 and, for Zone 1, which is split into Zone 1a and Zone 1b, we sought to achieve 100 and 50 completed interviews, respectively.
- 5.3.3 The survey company (NEMS) only managed to achieve 70 completed interviews in Zone 5: East Calder and 50 completed interviews in Zone 8: Winchburgh, however, as it ran out of telephone numbers to target, due to Zone 8 only containing around 2,000 households to approach for interview (not all with landlines). In Zone 5, despite there being around 4,700 households, NEMS only had 3,000 records to target (which is normally sufficient to achieve 100 interviews). Poor engagement (even amongst its most experienced and best call-to-interview convertors) meant that NEMS could only achieve 70 interviews, which is equivalent to 1.5 per cent of households. NEMS exhausted all available landline and mobile numbers for these two zones and even reached out to a partner provider to check feasibility for online surveys, but the geography was too small to accommodate this approach. Given the above, NEMS increased the number of interviews completed in other zones (taking them from 100 to between 105 and 130 interviews) to account for the shortfall in Zones 5 and 8. NEMS has confirmed that the overall study statistical error will remain unchanged at  $\pm 3.4$  per cent (with the zones with the larger sample sizes becoming more robust to account for the greater margin of error in Zones 5 and 8).

Figure 5-1 Study Area



## Survey Questionnaire

- 5.3.4 The questionnaire used for the telephone household survey, which is reproduced within Appendix C of the Appendices Volume, sought to establish:
- Patterns of convenience goods spending, based on the location of:
    - the store where the household last undertook a main food and grocery shop, the store visited the time before that, the amount spent, and the frequency of visits for main food shopping;
    - the shop where the household last undertook a 'top-up' food and grocery shop, the amount spent, and the frequency of visits; and
    - spending on food and groceries in small shops and markets, and the location and frequency of visits.
  - Patterns of comparison goods spending, based on the locations of the last purchase of:
    - clothes and shoes;
    - furniture, furnishings, carpets or other floor coverings, or household textiles;
    - DIY, decorating or gardening goods;
    - domestic appliances, such as washing machines, fridges, cookers, kettles or toasters;
    - electrical items, such as televisions, audio equipment, photographic equipment, mobile phones or tablets, or computer equipment;
    - recreational goods, such as toys and games, pets and pet products, books or stationery, sports equipment, bicycles or musical instruments; and
    - other non-food items, such as jewellery and watches, tableware and household utensils and other personal items such as travel goods.

## 5.4 Composite Patterns of Comparison Retail Goods Spending

- 5.4.1 The composite pattern of spending for comparison retail goods, as shown by Spreadsheet 4 within Appendix D, was achieved on the basis of expenditure data supplied by Experian. Table 5-1 below provides the weightings for each comparison retail category used to achieve the composite comparison figure.

Table 5-1 Composite Patterns of Comparison Goods Spend

| Category                                      | Percentage Weighting |
|---|----------------------|
| Clothes and footwear                          | 24.07                |
| Furniture, floorcoverings, household textiles | 13.58                |
| Hardware, DIY                                 | 6.06                 |
| Domestic appliances                           | 14.68                |
| TV, AV, phones and computers                  | 11.10                |
| Recreational goods                            | 16.61                |
| Other non-food                                | 13.88                |

- 5.4.2 The resident population of the study area in 2025, disaggregated by zone, is shown by the first row of figures in Spreadsheet 1 of Appendix D. The overall population in the 2025 base year amounts to 447,251 persons. Future year population projections to 2043 (also shown within Spreadsheet 1) are sourced from Experian Micromarketer App Library, which uses ONS-based data.

- 5.4.3 The per capita spend on comparison goods in 2025 (in 2023 prices) (Spreadsheet 2 of Appendix D) varies from a low of £4,025 in Zone 7 to a high of £4,677 in Zone 5. The total pot of comparison goods expenditure available to residents of the whole of the study area in 2025 is £1,903.9m (Spreadsheet 3 of Appendix D), of which £572.4m, or 30.1 per cent, is spent on special forms of trading (internet, catalogue and TV shopping, which we subsequently abbreviate as SFT), based on the findings of the household survey.
- 5.4.4 Spreadsheet 4 of Appendix D shows the market shares that each zone of the study area achieves in terms of the total spend on comparison retail goods by residents of each zone within the study area, and Spreadsheet 5 of Appendix D sets out the pattern of expenditure flows for the comparison retail goods sector as a whole, as revealed by the household survey.
- 5.4.5 Table 5-2, which is derived from the final two columns of Spreadsheet 5 of Appendix D, summarises the top five main destinations for comparison goods expenditure within the study area. Livingston Town Centre<sup>39</sup> is by far the dominant destination for comparison shopping within the study area, attracting £739.2m (55.1 per cent of total available expenditure) in the 2025 base year. The second most popular destination for comparison shopping within the study area – as revealed by the household survey – is Bathgate Town Centre<sup>40</sup>, which attracts £108.6m, or 8.1 per cent. The other retail destinations in Study Zone 1a: Almondvale (Livingston) attract £41.8m, or 3.1 per cent whilst Stockbridge Retail Park<sup>41</sup> attracts £40.3m (3.0 per cent of total available expenditure). The other retail destinations in Study Zone 3: Bathgate attract £30.3m, or 2.3 per cent.
- 5.4.6 Overall, some 83.3 per cent of comparison goods expenditure available to the study area's residents is spent within the study area. This is known as the aggregate retention rate.

Table 5-2 Comparison Goods Expenditure Retained Within the Study Area in 2025

| Destination  | Expenditure (£m) | Expenditure (%) |
|--|------------------|-----------------|
| Livingston Town Centre                                     | 739.2            | 55.1            |
| Bathgate Town Centre                                       | 108.6            | 8.1             |
| Other Retail Destinations in Study Zone 1a                 | 41.8             | 3.1             |
| Stockbridge Retail Park                                    | 40.3             | 3.0             |
| Other Retail Destinations in Study Zone 3                  | 30.3             | 2.3             |
| <b>Total Retained Expenditure in Study Area</b>            | <b>1117.5</b>    | <b>83.3</b>     |
| <b>Total Expenditure Leakage outside of the Study Area</b> | <b>224.6</b>     | <b>16.7</b>     |
| <b>Total</b>   | <b>1342.1</b>    | <b>100.0</b>    |

- 5.4.7 Table 5-2 confirms that 16.7 per cent or £224.6m of the comparison retail expenditure available to residents within the study area in 2025 'leaks' to destinations outside of the study area. The market shares and estimated comparison goods turnovers of the main centres and

<sup>39</sup> We have aggregated the available expenditure relating to rows 11-21 of Spreadsheet 5 of Appendix D to give an overall available expenditure for Livingston Town Centre since all of the stores/retail parks are located within the town centre itself. Some respondents specifically stated what stores/retail parks they last purchased non-food items whereas others were unable/unwilling to give any more detail when probed. There is no double counting as a result of aggregating the figures.

<sup>40</sup> We have aggregated the available expenditure relating to rows 35-37 of Spreadsheet 5 of Appendix D to give an overall available expenditure for Bathgate Town Centre since B&M at Bathgate Retail Park and the retail park more generally are located within the town centre itself. As with footnote 39, there is no double counting as a result of aggregating the figures.

<sup>41</sup> We have aggregated the available expenditure relating to rows 55 and 58 of Spreadsheet 5 of Appendix D to give an overall available expenditure for Stockbridge Retail Park. As above, there is no double counting as a result of aggregating the figures.

retail parks/freestanding stores outside of the study area are also set out in the last two columns of Spreadsheet 5 of Appendix D and are summarised in Table 5-3 below.

Table 5-3 Main Destinations for Comparison Goods Expenditure Leakage in 2025

| Destinations outside the Study Area   | Expenditure (£m) | Expenditure (%) |
|---------------------------------------|------------------|-----------------|
| Edinburgh City Centre                 | 48.3             | 3.6             |
| Central Retail Park, Falkirk          | 48.0             | 3.6             |
| Other, Outside Study Area             | 44.0             | 3.3             |
| Gyle Shopping Centre, Edinburgh       | 17.8             | 1.3             |
| Hermiston Gait Retail Park, Edinburgh | 12.4             | 0.9             |
| Glasgow City Centre                   | 11.5             | 0.9             |

5.4.8 The following destinations each account for £10m or more of comparison goods expenditure leakage: Edinburgh City Centre (£48.3m), Central Retail Park, Falkirk (£48.0m), other retail destinations outside of the study area (£44.0m), Gyle Shopping Centre, Edinburgh (£17.8m), Hermiston Gait Retail Park, Edinburgh (£12.4m) and Glasgow City Centre (£11.5m).

### Summary of influence within the Study Area

5.4.9 Spreadsheet 4 of Appendix D reveals that:

- Livingston Town Centre<sup>42</sup>, which enjoys the largest expenditure share, attracts more than 10 per cent of available comparison retail expenditure from all study zones:
  - Zone 1a: 78.7 per cent
  - Zone 1b: 80.4 per cent
  - Zone 2: 45.2 per cent
  - Zone 3: 44.0 per cent
  - Zone 4: 60.9 per cent
  - Zone 5: 69.5 per cent
  - Zone 6: 10.8 per cent
  - Zone 7: 68.2 per cent
  - Zone 8: 48.6 per cent
- Bathgate Town Centre<sup>43</sup> attracts more than 10 per cent of available comparison retail expenditure in the following three zones:
  - Zone 2: 12.1 per cent
  - Zone 3: 29.8 per cent
  - Zone 8: 10.7 per cent

<sup>42</sup> As with footnote 39, we have aggregated the percentages relating to rows 11-21 of Spreadsheet 4 of Appendix D to show overall what percentage of comparison retail expenditure Livingston Town Centre attracts since all the stores/retail parks are located within the town centre itself.

<sup>43</sup> As with footnote 40, we have aggregated the percentages relating to rows 35-37 of Spreadsheet 4 of Appendix D to show overall what percentage of comparison retail expenditure Bathgate Town Centre attracts since B&M at Bathgate Retail Park and the retail park more generally are located within the town centre itself.

- Stockbridge Retail Park<sup>44</sup> attracts more than 10 per cent of available comparison retail expenditure from only one zone:
  - Zone 6: 15.7 per cent
- Livingston Town Centre clearly exerts a significant influence across a large part of the study area, but it does not attract the greatest proportion of comparison retail expenditure in all zones:
  - Central Retail Park, Falkirk is the dominant comparison retail destination in Zone 6 (19.7 per cent), ahead of Livingston Town Centre which achieves a market share of only 10.8 per cent in this zone.

## 5.5 Composite Patterns of Convenience Retail Goods Spending

- 5.5.1 Per capita expenditure on convenience retail goods in 2025, based on Experian Micromarketer App Library data, varies across the study area from a low of £2,925 in Zone 2 to a high of £3,164 in Zone 6. The total amount of convenience goods expenditure available to residents of the whole study area in the 2025 base year is £1,351.9m (Spreadsheet 3 of Appendix E), of which only £1.4m is spent on SFT. The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Spreadsheets 4 and 5 of Appendix E.
- 5.5.2 Table 5-4 – which is derived from the final two columns of Spreadsheet 5 of Appendix E – reveals that, overall, some £1,255.0m of the £1,350.2m of the convenience expenditure available within the study area is accounted for by facilities within the study area. The resultant aggregate retention rate in the study area is 93.0 per cent (see Spreadsheet 5, final column, ‘Total Inside Study Area’ row).

Table 5-4 Broad Destinations for Convenience Goods Expenditure

| Destination                                      | Expenditure (£m) | Expenditure (%) |
|--|------------------|-----------------|
| Total retained expenditure within the Study Area | 1,255.0          | 93.0            |
| Total expenditure leakage                        | 95.2             | 7.0             |
| <b>Total Expenditure</b>                         | <b>1,350.2</b>   | <b>100.0</b>    |

### Main destinations for food and grocery shopping

- 5.5.3 Table 5-5 shows that the most popular destination for food and grocery shopping within the study area is Asda Supercentre, Almondvale Centre in Livingston, which has a survey-derived convenience retail goods turnover of around £123.4m, equating to a market share of 9.1 per cent. The next most popular destinations for convenience shopping within the study area are the Tesco Superstore at Blackburn Road in Bathgate and the Morrisons superstore at Almondvale Road in Livingston, with convenience retail turnovers of £85.4m and £74.4m, respectively, equating to market shares of 6.3 per cent and 5.5 per cent. Whilst the remainder of the destinations identified in Table 5-5 have a relatively low share of total expenditure on convenience goods across the study area – of 5 per cent market share or below – the absolute value of that expenditure is high, with the lowest survey-derived turnover of the four destinations being £48.7m.

<sup>44</sup> As with footnote 41, we have aggregated the percentages relating to rows 55 and 58 of Spreadsheet 4 of Appendix D to show overall what percentage of comparison retail expenditure Stockbridge Retail Park attracts.

Table 5-5 Main Destinations for Convenience Goods Expenditure Retained within the Study Area in 2024

| Foodstores within the Study Area                | Expenditure (£m) | Expenditure (%) |
|---|------------------|-----------------|
| Asda Supercentre, Almondvale Centre, Livingston | 123.4            | 9.1             |
| Tesco, Blackburn Road, Bathgate                 | 85.4             | 6.3             |
| Morrisons, Almondvale Road, Livingston          | 74.4             | 5.5             |
| Other shops in Study Zone 8                     | 66.1             | 4.9             |
| Morrisons, Linkston Way, Bathgate               | 64.8             | 4.8             |
| Sainsbury's, Almondvale Retail Park, Livingston | 57.4             | 4.3             |
| Other shops in Study Zone 1a                    | 48.7             | 3.6             |

- 5.5.4 There is a marginal 'leakage' of convenience goods expenditure to retail destinations outside the study area, cumulatively equating to a 7.0 per cent<sup>45</sup> market share and with only one centre/store accounting for £10m or more of convenience goods expenditure leakage.

Table 5-6 Main Destinations for Convenience Goods Expenditure Leakage

| Foodstores outside of the Study Area                | Expenditure (£m) | Expenditure (%) |
|---|------------------|-----------------|
| Asda Superstore, Morningside Road, Newmains, Wishaw | 10.4             | 0.8             |
| Other   | 84.8             | 6.3             |

- 5.5.5 The localised convenience goods retention rate – the proportion of expenditure on convenience retail goods available to residents in a specific zone which is spent in centres and stores located within that zone – is highest for Zones 1a, 3 and 6, each of which achieves a localised retention rate of over 80 per cent (see Spreadsheet 4 of Appendix E, and Table 5-7). Several zones achieve a localised convenience goods retention of below 50 per cent, namely Zones 1b, 2, 5 and 7, which have a localised retention rate of 8.8 per cent, 35.0 per cent, 18.5 per cent and 36.0 per cent, respectively. That finding is perhaps not surprising given that these zones do not contain any large-format foodstores.

Table 5-7 Localised Convenience Goods Retention Rates

| Zone | Zonal retention rate (%) |
|------|--------------------------|
| 1a   | 94.0                     |
| 1b   | 8.8                      |
| 2    | 35.0                     |
| 3    | 81.0                     |
| 4    | 66.5                     |
| 5    | 18.5                     |
| 6    | 80.7                     |
| 7    | 36.0                     |
| 8    | 54.9                     |

<sup>45</sup> With reference to the figures in Table 5-6, the figures do not tally due to rounding.

## Convenience Goods Market Shares

5.5.6 Table 5-8 shows, for each zone, the main convenience shopping destinations with a zonal market share of more than 10 per cent, and destinations with shares between 5 and 10 per cent. In summary, the survey findings confirm that most convenience shopping is undertaken on a highly localised basis. The most notable exceptions are Zone 1b: Almondvale (Elsewhere) where the majority of expenditure is spent in Zone 1a: Almondvale (Livingston), Zone 5: East Calder where the majority of expenditure is spent in Zone 1a: Almondvale (Livingston) and Zone 2: Armadale where the majority of expenditure is spent in Zone 3: Bathgate.

Table 5-8 Convenience Goods Stores with Zonal Market Shares over 5 Per Cent

| Zone | Expenditure (%) (greater than 10% market share)   | Expenditure (%) (market share between 5% and 10%)  |
|------|---|--|
| 1a   | <ul style="list-style-type: none"> <li>■ Asda Supercentre, Almondvale Centre, Livingston (21.3%)</li> <li>■ Other, Zone 1a (15.0%)</li> <li>■ Morrisons, Almondvale Road, Livingston (12.2%)</li> </ul>   | <ul style="list-style-type: none"> <li>■ Sainsbury's, Almondvale Retail Park, Livingston (9.3%)</li> <li>■ Local/small shops, Livingston Town Centre (8.2%)</li> <li>■ Aldi, Almondvale Road, Livingston (7.5%)</li> <li>■ Lidl, Alderstone Road, Livingston (7.3%)</li> </ul> |
| 1b   |   | <ul style="list-style-type: none"> <li>■ Co-op (Scotmid), Polbeth Road, Polbeth (5.8%)</li> </ul>  |
| 2    | <ul style="list-style-type: none"> <li>■ Asda, Station Road, Armadale (14.6%)</li> </ul>  | <ul style="list-style-type: none"> <li>■ Local/small shops, Armadale Town Centre (7.9%)</li> <li>■ Co-op (Scotmid), West Main Street, Armadale (7.2%)</li> </ul>   |
| 3    | <ul style="list-style-type: none"> <li>■ Morrisons, Linkston Way, Bathgate (16.4%)</li> <li>■ Aldi, Gardners Lane, Bathgate (13.7%)</li> <li>■ Tesco, Blackburn Road, Bathgate (13.4%)</li> <li>■ Other, Zone 3 (12.1%)</li> <li>■ Lidl, Whitburn Road, Bathgate (10.3%)</li> </ul> | <ul style="list-style-type: none"> <li>■ Local/small shops, Bathgate Town Centre (9.8%)</li> <li>■ Iceland, Whitburn Road, Bathgate (5.3%)</li> </ul>  |
| 4    | <ul style="list-style-type: none"> <li>■ Lidl, East Mains Street, Broxburn (19.6%)</li> <li>■ Aldi, Greendykes Road, Broxburn (14.6%)</li> </ul>  | <ul style="list-style-type: none"> <li>■ Other, Zone 4 (8.4%)</li> <li>■ Co-op (Scotmid), 63 East Main Street, Uphall (6.6%)</li> <li>■ Local/small shops, Uphall Village Centre (6.4%)</li> <li>■ Local/small shops, Broxburn Town Centre (6.1%)</li> </ul>                   |
| 5    |   | <ul style="list-style-type: none"> <li>■ Co-op (Scotmid), Redcraig Road, East Calder (5.6%)</li> </ul>   |

| Zone | Expenditure (%) (greater than 10% market share)  | Expenditure (%) (market share between 5% and 10%)  |
|------|--|--|
| 6    | <ul style="list-style-type: none"> <li>▪ Tesco, Links Road, Bo'ness (14.4%)</li> <li>▪ Aldi, Falkirk Road, Linlithgow (12.8%)</li> <li>▪ Tesco, Regent Centre, Linlithgow (11.1%)</li> </ul> | <ul style="list-style-type: none"> <li>▪ Sainsbury's, Gallowsknowe, Falkirk Road, Linlithgow (9.6%)</li> <li>▪ Local/small shops, Linlithgow Town Centre (7.5%)</li> <li>▪ Other, Zone 6 (6.3%)</li> <li>▪ Lidl, Links Road, Bo'ness (6.1%)</li> </ul> |
| 7    | <ul style="list-style-type: none"> <li>▪ Aldi, Longridge Road, Whitburn (15.3%)</li> </ul>   | <ul style="list-style-type: none"> <li>▪ Lidl, Longridge Road, Whitburn (7.7%)</li> <li>▪ Other, Zone 7 (6.7%)</li> </ul>  |
| 8    | <ul style="list-style-type: none"> <li>▪ Other, Zone 8 (54.9%)</li> </ul>  |  |

## 6 Assessment of Retail Needs

### 6.1 Introduction

6.1.1 Based on the retail spending patterns identified in the previous section, and forecasts of future population and retail expenditure growth, this section of the report provides the findings from our assessment of the quantitative need for additional retail floorspace over the study period. The section also outlines the findings from the qualitative questions that respondents were asked during the telephone household survey.

### 6.2 Quantitative Assessment

#### Methodology

- 6.2.1 The key inputs and assumptions that have been applied as part of our quantitative assessment of retail needs are explained below.
- 6.2.2 At the outset, we emphasise that capacity forecasts should, in line with national guidance, be subject to regular review throughout the plan period, in order to ensure an up-to-date evidence base which is based on accurate economic and market trends. Related to that general point, we advise that the longer-term quantitative forecasts identified by this assessment should be treated as indicative given the inherent uncertainties in respect of longer-term economic and demographic trends.

#### Population and Expenditure Growth

- 6.2.3 Spreadsheets 1, 2 and 3 within Appendices D and E set out details of predicted population and retail expenditure growth across the study area over the period to 2043. The population and expenditure figures are derived from Experian, and the former are based on ONS subnational population projections.
- 6.2.4 The population figures for the study area as a whole are presented below in Table 6-1, which shows that the study area is predicted to experience relatively modest population growth over the 18-year study period. The predicted population growth by 2043 is 28,771 persons, vis-à-vis the 447,251 base population across the study area in 2025, which equates to a growth of 6.4 per cent.

Table 6-1 Summary of Population Growth

| Year | Population | Population growth relative to 2025 | Population growth relative to 2025 (%) |
|------|------------|------------------------------------|--|
| 2025 | 447,251    | -                                  | -                                      |
| 2030 | 456,936    | 9,685                              | 2.2                                    |
| 2035 | 465,177    | 17,926                             | 4.0                                    |
| 2040 | 472,288    | 25,037                             | 5.6                                    |
| 2043 | 476,022    | 28,771                             | 6.4                                    |

- 6.2.5 Table 6-2 provides a summary of overall levels of convenience retail goods spending growth across the study period. An allowance is made for special forms of trading ('SFT'), taken from Experian's Retail Planner Briefing Note 22 ('RPBN') of March 2025, with those figures adjusted to take account of SFT sales which rely on traditional floorspace such as 'click and collect' shopping. Expenditure on SFT is excluded from our assessment as it is not considered to be available to support the future development of retail floorspace. Figures are provided to

one decimal place. Localised rates of SFT were captured by the household survey (see Spreadsheet 3 within Appendices D and E).

- 6.2.6 The localised rates vary for convenience and comparison goods. For convenience goods, the SFT market share identified by the household survey was just 0.1 per cent across the study area. We have applied the market share identified by the household survey without making any further adjustments in the base year and have grown this market share over the study period according to the growth rates implied by Experian's forecasts of market shares for SFT (RPBN, Figure 5). Experian's SFT growth forecasts cover the period to 2040 and we have carried forward the 2040 SFT growth forecast into 2043.

Table 6-2 Convenience Goods Expenditure Growth Summary

| Year | Convenience goods expenditure inc. SFT (£m) | SFT (£m) |
|------|---|----------|
| 2025 | 1,351.9                                     | 1.4      |
| 2030 | 1,372.8                                     | 12.4     |
| 2035 | 1,393.4                                     | 21.0     |
| 2040 | 1,414.6                                     | 31.2     |
| 2043 | 1,425.8                                     | 35.1     |

- 6.2.7 Table 6-3 provides an equivalent summary for comparison goods expenditure. We have adopted a market share for SFT of 30.1 per cent in the base year of 2025 across the study area based on the findings of the household telephone survey. The high SFT market share is not unique to this particular study area; it reflects a more general shift in consumer preferences, which was accelerated by the COVID-19 pandemic.
- 6.2.8 The SFT market share figure has been grown over the study period, based on Experian's predicted levels of change in SFT's market shares (RPBN, Figure 5).

Table 6-3 Comparison Goods Expenditure Growth Summary

| Year | Comparison goods expenditure inc. SFT (£m) | SFT (£m) |
|------|--|----------|
| 2025 | 1,903.9                                    | 572.4    |
| 2030 | 2,196.2                                    | 709.5    |
| 2035 | 2,561.9                                    | 882.0    |
| 2040 | 2,962.7                                    | 1,082.8  |
| 2043 | 3,225.0                                    | 1,202.9  |

## Retained Expenditure

- 6.2.9 The quantitative forecasts of retail need take account of the total amount of comparison and convenience goods expenditure which is retained within the study area. Table 6-4 sets out the total amount of expenditure retained within the study area in 2025.

Table 6-4 Summary of Retail Expenditure Retention in the Study Area at 2025 (excl. SFT)

| Retail category   | Available expenditure within study area (£m) | % of expenditure retained within study area | Expenditure retained within study area (£m) |
|-------------------|--|---|---|
| Comparison goods  | 1,342.3                                      | 83.3  | 1,117.5                                     |
| Convenience goods | 1,350.2                                      | 93.0  | 1,255.0                                     |

6.2.10 In total, 83.3 per cent of study area residents' expenditure on comparison retail goods is currently retained within the study area, and 93.0 per cent of study area residents' expenditure on convenience retail goods is retained within the study area.

### Claims on Expenditure

6.2.11 As set out in the previous section, spending on SFT (such as online shopping) has been removed from the expenditure forecasts. The total expenditure figures used in our assessments make an allowance for this.

6.2.12 In addition to SFT, it is necessary to take into account commitments for new retail floorspace (schemes implemented but not yet trading at the time of the household survey, extant planning permissions which would result in additional retail floorspace, and planned development); and sales density growth (which is the expected growth in turnover of existing retailers within the study area).

### Sales Density Growth

6.2.13 Sales density growth relates to the improved productivity or efficiency of retail floorspace over time. In assessing the amount of expenditure that is available to support the development of new retail floorspace, we make an allowance for sales density growth associated with existing retail floorspace within the study area. For comparison retail floorspace, we have assumed a 1.5 per cent retail sales density growth, which is informed by Figure 4b of Experian's RPBN. For convenience retail floorspace, no allowance is made for improving sales efficiency in existing stores due to very low forecasts of sales density growth.

### Planning Commitments

6.2.14 The planning commitments – which were identified by the Council – have been taken account of in the quantitative need assessment and are identified in Table 6-5 below.

Table 6-5 Retail Commitments

|  | Gross Retail Floorspace (sq.m) | Convenience Retail Sales Area Floorspace (sq.m) | Comparison Retail Sales Area Floorspace (sq.m) |
|--|--------------------------------|---|--|
| Lidl at Almond Road, Livingston                  | 1,335                          | 694   | 187  |
| Sainsbury's at Duntarvie Castle Road, Winchburgh | 1,352                          | 703   | 189  |
| Home Bargains at Heartlands Terrace, Whitburn    | 2,545                          | 238   | 1,526  |

|  | <b>Gross Retail<br/>Floorspace<br/>(sq.m)</b> | <b>Convenience<br/>Retail Sales Area<br/>Floorspace (sq.m)</b> | <b>Comparison Retail<br/>Sales Area<br/>Floorspace (sq.m)</b> |
|--|---|--|---|
| Tesco Superstore at<br>Heartlands Terrace,<br>Whitburn | 2,838   | 1,476  | 397   |
| <b>Total</b>   | <b>8,070</b>                                  | <b>3,111</b>   | <b>2,299</b>  |

6.2.15 We estimate that the committed retail floorspace referred to above will generate a convenience goods turnover of £3.9 million in 2043, and a comparison goods turnover of £23.8 million in the same year. Further details of the assumptions applied in estimating the turnover of committed retail floorspace are contained within Spreadsheet 6 of Appendices D (comparison) and E (convenience).

### Need for Convenience Retail Floorspace

6.2.16 Spreadsheet 7 of Appendix E provides our forecasts of convenience retail floorspace requirements arising within the study area. Floorspace requirements have been calculated to the end of the study period and for the interval years of 2025, 2030, 2035, 2040 and 2043. The spreadsheet is structured as set out below in Table 6-6, where we explain some of the other assumptions that we have applied in calculating the quantitative floorspace requirements.

Table 6-6 Methodology for Convenience Retail Assessment

| <b>Row</b> | <b>Explanation/Description</b>   |
|------------|--|
| A&B        | Total population and convenience retail expenditure available in the study area. These figures are taken from Spreadsheets 1 and 3.  |
| C&D        | Proportion of convenience retail goods expenditure which is retained within the study area (£m & %) based on the findings of the household telephone survey in 2025 (as detailed in Spreadsheet 5).  |
| E&F        | Assumed inflow of convenience retail expenditure to destinations within the study area from residents outside the study area.  |
| G          | Total convenience retail turnover of destinations within the study area (£m).  |
| H          | Residual growth in convenience retail expenditure (£m), which is calculated by deducting the baseline convenience retail turnover of existing stores within the study area from the total sum of available convenience retail expenditure and inflow.  |
| I&J        | Claims on residual growth in convenience retail expenditure including turnover from committed convenience retail floorspace. Commitments are expected to be implemented and trading by 2029, and the total turnover figure from commitments is taken from Spreadsheet 6. A constant sales density was applied to both existing stores and committed convenience retail floorspace. |
| K          | Total claims on expenditure (£m) in existing stores and committed convenience retail floorspace.   |
| L          | Final residual convenience retail expenditure (£m), calculated by deducting total claims on expenditure from residual growth in retained convenience goods expenditure.  |

| Row | Explanation/Description   |
|-----|---|
| M-O | Final residual convenience retail expenditure converted into floorspace requirements by applying an average convenience retail sales density of £12,500 <sup>46</sup> per sq.m in 2025 (held constant throughout the study period). This produces a sales area floorspace requirement, which is converted to a gross convenience retail floorspace figure on the basis of an assumed net:gross floorspace ratio of 65:35. |

6.2.17 Our findings in respect of quantitative need for convenience retail floorspace are summarised below in Table 6-7 (figures relate to sales area floorspace only).

Table 6-7 Summary of Convenience Retail Floorspace Requirements

| Floorspace Requirement                              | 2025 | 2030 | 2035  | 2040  | 2043  | Change between 2025-2043 |
|---|------|------|-------|-------|-------|--------------------------|
| Floorspace requirement (sales area floorspace sq.m) | 0    | 502  | 1,483 | 2,383 | 2,973 | 2,973                    |
| Floorspace requirement (gross sq.m)                 | 0    | 772  | 2,282 | 3,667 | 4,574 | 4,574                    |

6.2.18 We have identified a very limited positive convenience retail floorspace requirement over the entire study period 2025 to 2043 of 2,973 sq.m (sales area).

### Need for Comparison Retail Floorspace

6.2.19 Spreadsheet 7 of Appendix E calculates requirements for comparison retail floorspace over the study period. Table 6-8 below explains the structure of our assessment, which is similar to the approach used for convenience retail floorspace, albeit the assumptions differ in terms of sales densities and net:gross floorspace ratios.

Table 6-8 Methodology for Comparison Retail Assessment

| Row | Explanation/Description  |
|-----|--|
| A&B | Total population and comparison retail expenditure available in the study area. These figures are taken from Spreadsheets 1 and 3.   |
| C&D | Proportion of comparison retail expenditure which is retained within the study area (£m & %) based on the findings of the household telephone survey in 2025 (as detailed in Spreadsheet 5).   |
| E&F | Assumed inflow of comparison retail expenditure to destinations within the study area from residents outside the study area.   |
| G   | Total comparison retail turnover of destinations within the study area (£m).   |
| H   | Residual growth in comparison retail expenditure (£m), which is calculated by deducting the baseline comparison retail turnover of existing stores within the study area from the total sum of available comparison retail expenditure and inflow. |

<sup>46</sup> This figure is the average convenience retail sales density for the 10 major grocery retailers (Global Data, December 2024).

| Row | Explanation/Description  |
|-----|--|
| I&J | Claims on residual growth in comparison retail expenditure including sales density growth in existing stores within the study area and turnover from committed comparison retail floorspace. Commitments are expected to be implemented and trading by 2029, and the total turnover figure is taken from Spreadsheet 6. An annual sales density growth rate of 1.5% is applied to both existing stores and committed comparison retail floorspace. |
| K   | Total claims on expenditure (£m) from sales density growth in existing stores and committed comparison retail floorspace.  |
| L   | Final residual comparison retail expenditure (£m), calculated by deducting total claims on expenditure from residual growth in retained comparison goods expenditure.  |
| M-O | Final residual comparison retail expenditure converted into floorspace requirements by applying an average comparison retail sales density of £11,000 <sup>47</sup> per sq.m in 2025 (grown over the study period to allow for sales density growth). This produces a sales area floorspace requirement, which is converted to a gross comparison retail floorspace figure on the basis of an assumed net:gross floorspace ratio of 70:30.         |

6.2.20 Our findings in respect of quantitative need for comparison retail floorspace are summarised below in Table 6-9.

Table 6-9 Summary of Comparison Retail Floorspace Requirements

| Floorspace Requirement                              | 2025   | 2030   | 2035   | 2040  | 2043  | Change between 2025-2043 |
|---|--------|--------|--------|-------|-------|--------------------------|
| Floorspace requirement (sales area floorspace sq.m) | -1,609 | -6,865 | -1,430 | 2,935 | 2,378 | 3,987                    |
| Floorspace requirement (gross sq.m)                 | -2,299 | -9,807 | -2,042 | 4,194 | 3,396 | 5,696                    |

6.2.21 We have identified a very limited positive comparison retail floorspace requirement over the entire study period 2025 to 2043 of 3,987 sq.m (sales area). It is important to note, however, that the modest positive floorspace requirement only arises from 2035 onwards.

## Customer Views

6.2.22 In this section we set out the key responses from the telephone household survey undertaken by NEMS and consider whether they suggest a qualitative need for additional comparison and/or convenience retail provision in Livingston Town Centre. Figures are provided to one decimal place.

6.2.23 Respondents were asked 'How often do you usually visit Livingston Town Centre?' More than a quarter (27.1 per cent) of respondents answered 'once a week' whilst 17.3 per cent answered 'once every two weeks', 17.1 per cent stated 'once a month' and 10.5 per cent said

<sup>47</sup> We calculated the average comparison retail sales density for Livingston Town Centre and tempered the figure slightly based on professional judgement. We did not use an average comparison retail sales density figure based on all of the study centres in West Lothian since this would drastically skew the figure, and Livingston Town Centre is realistically the only place that is likely to attract additional comparison retailers in the future.

'once every two months'. It is therefore clear that Livingston Town Centre is frequently visited by residents living within the study area.

- 6.2.24 When asked *'What time of day do you normally visit Livingston Town Centre?'*, 43.6 per cent responded *'6am to 12 noon (morning)'*, 34.7 per cent responded *'after 12 noon to 3pm (early afternoon)'*, 12.5 per cent responded *'after 3pm to 7pm (late afternoon)'*, 2.0 per cent responded *'after 7pm to 2am (evening)'* and 7.2 per cent responded *'don't know/varies'*. Earlier in the report we noted our observation that Livingston Town Centre has a relatively poor evening/night-time economy offer, which accords with the household survey finding that only a small percentage of respondents visit the town centre in the evening.
- 6.2.25 Respondents who had visited Livingston Town Centre during the past year / 12 months were asked *'When you visit Livingston Town Centre, what do you usually come to do?'* (responses could be multi-coded). Over three-quarters (76.4 per cent) of respondents said *'non-food shopping'* and 40.5 per cent responded *'food shopping'*. Other popular responses included *'visiting café / pub / restaurant'* (35.2 per cent), *'leisure activity'* (16.8 per cent), *'window shopping / browsing'* (11.9 per cent) and *'visiting family / friends'* (10.6 per cent).
- 6.2.26 When asked *'How do you usually travel to Livingston Town Centre?'*, the majority (65.7 per cent) said by *'car / van – driver'*, with 17.3 per cent saying *'car / van – passenger'*. Besides car, the second most popular transport mode was by bus (11.6 per cent of the total responses), while 3.9 per cent of respondents answered that they visited Livingston Town Centre by foot. Other modes of transport received only negligible shares of the responses.
- 6.2.27 Respondents who had visited Livingston Town Centre during the past year / 12 months were asked what they liked most about Livingston Town Centre. The most popular responses were *'close to home'* (12.9 per cent), *'shops – good range of non-food shops generally'* (12.0 per cent), *'nothing'* (10.4 per cent), *'you can get everything you need there'* (8.9 per cent), *'good layout / shops close together'* (8.7 per cent), *'has undercover shopping'* (8.4 per cent), *'shops – good range of high street retailers'* (6.1 per cent), *'shops – good range of quality shops'* (4.7 per cent), *'shops – good range of affordable shops'* (4.5 per cent), *'good cafés / restaurants'* (3.5 per cent) and *'attractive environment / nice place'* (3.2 per cent). It is clear from the responses above that Livingston Town Centre caters for all types of shopping needs (affordable, 'high street' and quality) and there is a good range of retailers.
- 6.2.28 Respondents who had visited Livingston Town Centre during the past year / 12 months were asked what they liked least about Livingston Town Centre. The most popular responses were *'nothing'* (35.4 per cent), *'too busy / crowded'* (9.9 per cent), *'parking – no free parking'* (6.0 per cent), *'parking – not enough spaces available'* (4.4 per cent), *'parking – expensive parking'* (3.6 per cent), *'shops – need more independent shops'* (3.2 per cent), *'too many empty shops'* (2.9 per cent) and *'lack of security / don't feel safe'* (2.8 per cent).
- 6.2.29 When asked *'Are there any measures or changes that would encourage you to visit Livingston Town Centre more often and/or stay in the Town Centre for longer?'* (respondents' first three responses were recorded), 41.0 per cent answered *'nothing'*, 10.9 per cent answered *'more / better leisure facilities (e.g. leisure centres, cinema, health and fitness clubs, etc)'*, 6.8 per cent answered *'parking – make it cheaper'*, 6.1 per cent answered *'shops – more high quality shops'*, 5.7 per cent answered *'parking – make it free'* and 5.6 per cent answered *'more / better cafés / restaurants'*.

## 7 Summary of Findings, and Recommendations

### 7.1 Introduction

7.1.1 In this concluding section we summarise the findings of the study and provide our recommendations that can be used in emerging planning policies.

### 7.2 The Performance of West Lothian's Centres

7.2.1 In Section 4 of the report, we considered the performance of Livingston as well as the five traditional town centres of Armadale, Bathgate, Broxburn/Uphall, Linlithgow and Whitburn. We summarise the findings in respect of the centres below and make recommendations on how they could be improved.

7.2.2 We found Livingston and Linlithgow to be healthy town centres when assessed against key indicators of vitality and viability. It was clear from our visit that Livingston is the dominant retail destination within West Lothian and the town contains a substantial concentration of retail uses. Livingston caters for all categories of comparison retail and the town boasts several large format foodstores. It does, however, lack an extensive evening/night-time economy given that its main focus is retail. The results of the household survey indicate that residents would choose to visit the town more frequently if it had a better leisure offer and the parking was more affordable.

7.2.3 Linlithgow's charm stems from its setting by the loch and palace and its range of independently owned cafés, tearooms, coffee shops and restaurants. These factors set the centre apart from Livingston and the other traditional town centres within West Lothian. We consider that the centre's strong independent offer is a significant strength rather than any weakness or deficiency and therefore the Council should seek to maintain the town centre's current mix of uses rather than focusing on attracting additional national multiple retailers as this would effectively replicate national multiple retail provision in nearby Livingston. Linlithgow's town centre environment would greatly benefit from the beautification of The Vennel, which appears out-of-place at present.

7.2.4 We found Broxburn/Uphall to be a fairly healthy centre insofar as it serves a localised catchment. Despite 'Broxburn/Uphall' being described within the Local Development Plan as one of West Lothian's five traditional town centres, it is effectively two separate retail centres with Broxburn functioning as a district centre and Uphall more akin to a local centre. The town's fairly limited range of comparison retailers reflects its role in serving a localised catchment as does its convenience retail offer which primarily caters for residents' top-up shopping needs. Broxburn's town centre environment would benefit from the re-development of Argyle Court.

7.2.5 We did not find Bathgate to be a particularly healthy centre. Despite Bathgate being the second largest settlement in West Lothian, the centre has a poor range of comparison retail uses and its retail offer primarily caters for the lower end of the market. The town centre has a rather bleak feel to it and lacked footfall and vibrancy.

7.2.6 We found both Armadale and Whitburn to be extremely low-grade centres and there were a number of similarities between the two. Both centres had very few actual shops, a high proportion of hot-food takeaways, an abundance of hairdressers and beauty parlours and a very poor town centre environment. The town centres clearly serve a very localised catchment, and it is for that reason we consider them more akin to poor-quality district centres (or even a local centre in Armadale's case).

## 7.3 Recommendations

7.3.1 In addition to the centre-specific recommendations we make above and elsewhere in the report, we also put forward the following more general recommendations which we consider the Council should take forward in order to bolster the health of the centres:

- Bringing vacant units back into productive use: this would increase consumer choice, improve the town centre environment, increase footfall and vibrancy and establish an active frontage.
- The Council could encourage 'meanwhile' uses in the town centres, which would support an active frontage approach and help to improve the centres' physical environment. Meanwhile spaces also allow for experimentation and, as they are not purpose-built, they often provide affordable space to occupiers who would typically be priced out. Whilst meanwhile uses would help to improve people's perceptions of the town centres, the Council should not lose sight of the overall aim of attracting long-term occupiers to vacant units.
- Targeted shop front enhancement work and general public realm improvements: whilst these measures might not be transformational, they would help to improve people's perceptions of the town centres and provide for a more pleasant shopping experience which are key determinants of where people choose to shop.
- Town centre uses other than retail should be considered: successful high streets need to have a mix of independent shops, markets, well-known retail chains, leisure & entertainment, community facilities and key services especially considering many retailers are unlikely to return to West Lothian's centres.
- The Council could consider cladding the windows of vacant town centre units with reflective material to give the appearance of an active frontage. This does not address the root problem but helps to improve the town centre environment and visitors' perceptions especially given that many of West Lothian's centres are poorly maintained and not attractive.
- The Council should not only direct its attention to those units which are already vacant but also concentrations of lower grade town centre uses and areas where there is risk of further occupier decline. Proactively targeting such areas will help to limit the number of vacant units rising further.
- The Council should promote more residential conversions at upper floor level within the town centres: this would generate more footfall throughout the day and night, support the towns' evening economy offers and increase the vibrancy of the centres.

## 7.4 Retail Needs arising over the Study Period

7.4.1 Based on the findings of our quantitative assessment of retail needs, set out in Section 6, we forecast that there is a very limited positive convenience retail floorspace requirement over the entire study period 2025 to 2043 of 2,973 sq.m (sales area). It is important to emphasise that the convenience retail floorspace requirement relates to the entire study area and is therefore very limited (akin to a couple of new Aldi or Lidl foodstores). That finding is a consequence of relatively modest population and expenditure growth over the study period, and a fairly high assumed average convenience retail sales density, leaving a small positive residual level of available expenditure. A very limited positive floorspace requirement effectively means there is adequate existing convenience retail floorspace within the study area and only a small need for additional retail floorspace.

- 7.4.2 In qualitative terms, we note that there are already several large foodstores within Livingston Town Centre (Asda, Morrisons and Sainsbury's) which serve local residents' convenience shopping needs. The town is also already served by the likes of Aldi and Lidl. We therefore consider that, where additional convenience retail floorspace requirements arise over the plan period, they should not automatically be directed to support new foodstore development in Livingston Town Centre – unless they would provide a niche offer that is not currently available within the town centre (such as a permanent fresh produce market) – as this may lead to an over-saturation of the market. We consider that this additional convenience retail floorspace would be better directed to other, perhaps more rural, locations within the study area, albeit we would expect this to be limited in scale and to not represent any significant claims on overall convenience retail expenditure capacity.
- 7.4.3 Similarly, we identify a very small requirement for 3,987 sq.m of additional comparison retail sales area floorspace across the study area over the period to 2043, all of which arises after 2035. It should be emphasised that this requirement covers a c.20-year study period and relates to the whole of the fairly extensive study area. Whilst Livingston Town Centre already contains a substantial concentration of comparison retail uses it is realistically the only obvious place that will attract additional national multiple comparison retailers, besides Bathgate, which could potentially attract some lower-quality retailers.

## 7.5 Monitoring and Review

- 7.5.1 A number of indicators should be monitored by the Council to determine possible changes to retail floorspace requirements over the development plan period, which include:
- The implementation of existing retail commitments. Non-implementation of commitments or the expiry of existing planning permissions will slightly increase the small positive retail floorspace requirements.
  - Expenditure growth rates reflect general economic conditions and therefore an acceleration in economic growth is likely to increase the small positive retail floorspace requirements as a result of increased expenditure growth rates. Conversely, any future economic downturn is likely to reduce the already small floorspace requirements as a result of lower or negative expenditure growth rates.
  - The market share of non-store retail sales (special forms of trading) has increased considerably over recent years, and this should be monitored carefully.
- 7.5.2 In addition to monitoring, we recommend that the Council should maintain an up-to-date picture of the performance of West Lothian's centres as well as any qualitative retail needs by continuing to review the composition of the centres and their vacancy rates.

Any sustained and significant changes in any of the key indicators should prompt a review and update of this assessment to ensure that the Council is meeting objectively assessed retail needs, encouraging sustainable shopping patterns and implementing the most appropriate strategy to support the vitality and viability of West Lothian's network of centres.