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Strategic Review of Town Centres and Retailing in the TAYplan area

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1 Introduction and scope

1.1 Introduction

1.1.1 **Roderick MacLean Associates Ltd** was commissioned by the TAYplan Strategic Development Planning Authority to prepare this Review of Town Centres and Retailing for the emerging replacement TAYplan.

1.2 Scope

1.2.1 The purpose of the research is to inform the second Main Issues Report on key strategic issues associated with town centres in the TAYplan area. Three main elements of the research are specified in the consultancy brief, as follows:

1.2.2 **Analysis of policy and emerging policy-** a concise review of the current policy framework on town centres, including the recent External Town Centre Review Group Report; the draft SPP; current development plans and MIR reports.

1.2.3 **Analysis of national regional and local trends-** a review of trends in retailing, such as online spending and trends in retail property market demand, including information on the TAYplan area; trends in public attitudes to town centres, and trends in footfall in the main town centres within the TAYplan area.

1.2.4 **Data review:**

- Review of the existing town centre database held by the TAYplan local authorities; identification of gaps or inconsistencies in the information (especially market demand information), plus remedies and/or recommendations on how to address the matters;
- Provide a summary of the comparison retail and non-retail service floorspace in the main town centres, plus vacancies. The main town centres identified in the consultancy brief include: *Dundee, Perth, Arbroath, Cupar, Forfar, Montrose, St Andrews* and the smaller centres of *Aberfeldy, Alyth, Brechin, Carnoustie, Coupar Angus, Kirriemuir, Monifieth and Newburgh-* 15 in total. Anstruther is not included in the review, although it is part of the wider catchment of St Andrews;
- Identify the role of comparison retailing in the hierarchy of town centres (TAYplan Policy7), including consideration of cross boundary issues between the local authorities – both internal and external to the plan area;
- Examine the strengths, weaknesses and opportunities relating to the key town centres in order to promote their diversity, character and sense of place. This includes diversity of uses, key festivals, cultural events etc.

1.2.5 The review requires a holistic approach to town centre policy and not simply focus on retailing. For example, this requires looking at factors such as attractiveness of town centres as places to visit, invest and live and work. In addition, the exercise suggests a consistent and standardised method of collecting data on town centres to monitor the health of the centres.

2 Policy and emerging policy

2.1 Introduction

2.1.1 This section reviews the current planning policies relating to town centres, together with emerging draft policies and recommendations on shaping the future of town centres in Scotland.

2.2 Current Scottish Planning Policy (SPP)

2.2.1 Published in 2010, the SPP identifies town centres as a key element of the economic and social fabric of Scotland. Town centres should be the focus for a diversity of uses, including retail, leisure, entertainment, recreation, cultural and community facilities, homes and businesses. The SPP requires the development of a network of centres, with each centre having a defined role within the network. Town centre health check monitoring is needed to assess any changes in the roles of centres over time.

2.2.2 Improvement to town centres are promoted by the SPP, including quality of the built environment, accessibility, realisation of development opportunities, the evening economy, vitality and other qualities. Town centre strategies are the key to realising improvements and the SPP provides a summary structure of assessment and monitoring to achieve this.

2.2.3 The current SPP contains a list of key health check indicators to assess the vitality and viability of town centres:

- Pedestrian flow;
- Prime rental values;
- Space in use for different town centre uses and how has changed;
- Retailer representation and intentions;
- Commercial yields;
- Vacancy rates;
- Physical structure of the centre, including opportunities, constraints and accessibility;
- Periodic surveys of consumers; and
- Crime rates

2.2.4 Application of the sequential test is required to direct new retail and commercial leisure developments to town centres as a priority over other locations. The order of priority is: town centres, edge of centre locations, other types of centre and out of centre locations which are accessible by a variety of transport modes.

2.3 Draft Scottish Planning Policy

2.3.1 The Consultation Draft SPP was published in April 2013 and the final SPP will be published in June 2014. The main change in emphasis compared to the current SPP is the greater focus on encouraging the diversity of uses and vitality within town centres generally, alongside improvement to the quality of the centres as places to live and work. It proposes a holistic approach, with less singular focus on retailing and commercial leisure.

2.3.2 Additional health check indicators are proposed (alongside those in the current SPP), in order to assess town centres more fully. These include regular monitoring of the following town centre characteristics:

- Employment;
- Cultural and social activity;
- Leisure facilities; and
- Residential population

2.3.3 The draft also invites consideration of whether all significant footfall uses should be subject to the sequential test.

2.3.4 There is more detail on the development of town centre strategies in the draft SPP, especially on the need for local authorities to work with partners and engage the community. This requires establishment of long term visions for town centres; identify the potential for change; constraints; promotion of opportunities through funding; masterplanning and design, increased accessibility and other issues. All this supports the 'Town Centres First' policy in the draft document.

2.3.5 Also, the draft SPP contains a summary of key characteristics which must underpin the definition of a town centre in development plans:

- Diversity of uses, including shopping;
- A high level of accessibility;
- Qualities of character and identity which create a sense of place and further the wellbeing of communities;
- Wider economic and social activity during the day and in the evening;
- Integration with residential areas; and
- Environmental quality

2.3.6 The replacement SPP, when published next year, will contain some amendments. In the recently published **Consultation Responses** (September 2013) to the draft SPP, nearly 90% of the respondents favoured town centre health checks, but there was concern over the draw on resources and that health checks should not be too prescriptive. There were mixed views on frequency of monitoring too, but biennial checks were among the most frequent suggestions.

2.3.7 Few respondents objected to the existing list of indicators in the draft SPP. However, most respondents considered that additional indicators could be added to the list in the draft SPP, but the suggestions were very varied. Many were really elaboration of the existing list of indicators. Significant numbers of respondents felt that there should be more assessment of public realm and also, accessibility.

2.3.8 There was overwhelming support for the proposal that local authorities should prepare town centre strategies, as set out in the draft SPP.

2.3.9 Some 70% of respondents favoured application of the 'town centre first' policy to all footfall generating uses, with application of the sequential test to a wider range of uses.

2.4 National Review of Town Centres

2.4.1 The External Advisory Group's Report to the Scottish Government entitled *Community and Enterprise in Scotland's Town Centres* was published in June 2013. This document sets out a 'Town Centres First' principle, where the health of town centres is given central focus in planning for the future, with an emphasis on promoting diversity of activity within them. It has not been formally adopted by the Scottish Government, though.

2.4.2 The report draws attention to the importance of generating footfall as the key to successful town centres. This requires investment in town centres and the attraction of a range of footfall generating activities. Attention is drawn to the benefits of attracting new housing, creating accessible public services, community projects, arts and commercial opportunities to town centres. There is an emphasis on developing community engagement to realise this potential. The report contains a number of recommendations on how to stimulate this process, including funding, co-operation between organisations and establishing wider information systems, such as greater awareness of existing site/ property development opportunities in the town centres.

2.4.3 Under the 'Town Centre First' outlook, the report recommends that the current sequential test in planning policy should be applied to all footfall creating uses, giving priority to town centres as the preferred location.

2.4.4 Related recommendations include: evaluation of development of a single town centre use class; incentives to developers by reducing their usual contributions; application of a wider cost benefit appraisal of development proposals on an 'in-town centre' versus 'out of centre' approach; and proactive compulsory purchase orders to stimulate vacant and under-used land in town centres. It is also recommended that a 'masterplanning' toolkit is developed for communities to assist promote their vision within planning polices for the town centres.

2.4.5 In summary, the report by the External Group encourages a holistic approach to developing town centres, well beyond the current emphasis on retailing. It reinforces the provisions of the draft SPP policy on town centres in terms of the need to review the overall health of town centres.

2.4.6 The Scottish Government responded to the External Review Group's

Report in November 2013, with publication of their *Town Centre Action Plan*. This political document sets out a number of action points. These include:

- How to make the 'town centre first' policy work in practice;
- Support for housing in town centres;
- Economic support/ business development
- Support for community involvement;
- Increase access to public services;
- Provision of digital technology; and
- Promotion of pro-active planning.

2.5 Current TAYplan

2.5.1 The current TAYplan was approved in June 2012, for the period 2012-32. On town centres, the document briefly summarises the aims of the current SPP, including the sequential test. As a strategic plan, the focus is on identification of the hierarchy of centres, which are set out under Policy 7 (TAYplan Table 2). This is re-iterated in the table at the end of this section. Note that the study brief does not include all the smaller town centres listed in Table 2.

2.5.2 Under Policy 7, comparison retail development is to be focussed on the centres identified in Table 2, with the largest scale of activity in the largest town centres.

2.5.3 Local Development Plans (LDPs) should identify the boundaries for each town centre listed under Table 2. LDPs can also identify roles for 'other service' centres, beneath the regional hierarchy. These can include commercial centres for leisure, bulky goods and other retail. Similarly, the role of local centres for convenience and comparison retailing can be included, particularly in multi-centre settlements such as Dundee, Perth and Arbroath. LDPs should also support a mix of uses in city and town centres that encourage their vitality and diversity of economic and social activity, both during the day and in the evening.

2.5.4 Planning decisions should be based on the justification of planning proposals combining the hierarchy in Table 2, with application of the sequential test and other considerations as appropriate.

2.5.5 In light of the emerging requirement for a more holistic assessment of town centres, Policy 7 in the current TAYplan invites consideration of adjustments to reflect this requirement. Table 2, for example, expresses the hierarchy of centres in terms of comparison retailing only. A review of the hierarchy itself is relevant too, as far as it applies to the selected town centres in this study.

2.6 Local Plans and Local Development Plans

2.6.1 Of interest are issues with the town centres which can be identified from the published Main Issues Reports or Proposed Local Development Plans.

2.6.2 **Angus LDP MIR** (2013) - invited consideration of whether to have a long term vision to guide specific improvements to the town centres.

2.6.3 **Dundee City LDP** (2013) - identifies the city centre as the main shopping centre for 'the region'. It protects the main shopping frontages and supports restrictions on the range of goods that can be sold in Dundee's retail parks. The sequential test for new retail developments is re-iterated, with the regard to the city centre and the district centres. A similar test applies to proposed Class 2 office developments

2.6.4 **FIFEplan MIR** (2013) - asked the public how the new plan can help town centres fulfil a new role in light of recent changes. Proposals to support investment in the town centres are an issue, including proposals to restrict out of centre retailing. Promotion of accessibility to town centres by all modes of transport is an issue. The MIR also invites consideration of the removal of retail sites which are not developed within the life of the initial consent.

2.6.5 **Perth & Kinross Proposed LDP** (2013) - identifies Perth City Centre as the sub regional shopping centre in the TAYplan, together with the hierarchy of smaller town centres in the network. The plan encourages Class 1 retailing in the centres, together with flexibility to create larger floor plates. Selective support is also given to Classes 2 and 3. The sequential test applies to retail and commercial leisure facilities.

2.7 Other strategic plan MIRs

2.7.1 The **SESplan MIR** (2010) contained a brief section on town centres and retailing. The preferred option was to establish a strategic hierarchy based around Edinburgh City Centre and comment was invited on this single issue relating to town centres.

2.7.2 The **Aberdeen and Shire MIR** (2011) refers to the strong emphasis on protecting the vitality and viability of town centres and Aberdeen City Centre as the regional centre for shopping. Under the heading of 'Retail' it invited consideration of whether the structure plan policy supports sustainable economic growth and is ambitious in its vision.

2.7.3 **The Glasgow and Clyde Valley MIR** (2010) places Glasgow City Centre as the focus of the city region at the top of a network of centres. The MIR refers to diversity in town centres and to the role of comparison retailing. There is a detailed table summarising the role and function of the town centres. The MIR invited consideration of the network of centres set out in the MIR.

2.7.4 **Relevance to the TAYplan 2 MIR**- the MIRs for the other strategic plans precede the more recent policy emphasis on town centres in the draft SPP and the National Review of Town Centres. Apart from the Glasgow and Clyde Valley MIR, the issues offered for comment were brief. The recent changes suggest benefit in offering more than one or two issues for consideration in relation to town centres in the new TAYplan MIR. However, the MIR will inform the Proposed Plan, where the policy detail will be developed.

Current TAYplan

Table 2: Hierarchy of Comparison Retail Centres

Hierarchy of Comparison Retail Centres					
Regional Centre	Dundee City Centre				
Sub-regional Centre	Perth City Centre				
Larger Town Centres	Arbroath	Cupar	Forfar	Montrose	St Andrews
Smaller Town Centres	Aberfeldy Alyth Anstruther	Auchterarder Blairgowrie Brechin	Carnoustie Coupar Angus Crieff	Kirriemuir Kinross Monifieth	Newburgh Pitlochry
Commercial Centres	Gallagher Retail Park	Kingsway East	Kingsway West	St. Catherine's Retail Park (Perth)	

3 National, regional and local trends and current position

3.1 Introduction

3.1.1 This section provides information on trends affecting town centres, including trends in retailing and public perceptions and use of town centres in recent years. For most economic analysis, Scotland would be defined as a 'region'. However, for the purposes of this research, 'regional and local' refers to the TAYplan area and its towns.

3.2 Economic growth

3.2.1 The consensus forecasts for the UK, published in July 2013, predict an average growth rate of 1% for the economy in 2013 and 1.7% for 2014. Recent data shows that the service sector, which includes retailing, has grown at its fastest rate for more than two years. Forecasts of growth in the Scottish economy by the Fraser of Allander Institute are similar, including forecast growth of 1.9% in 2015.

3.2.2 Economic growth and business confidence is improving compared to recent years, but the IMF caution that recovery of the UK economy is likely to remain weak. This view is backed up by the British Chambers of Commerce and other organisations.

3.2.3 The predicted upward growth is encouraging for future investment in town centres, although the recovery will be slow. Over the past four years, investment has been low relative to previous years, with many development projects postponed or abandoned. Lending by banks is likely to remain restricted for some time.

3.3 Retail spending

3.3.1 In Scotland, retail sales increased by 2.1% over the year to October 2013. On a like for like basis, growth in food sales was 3% over the year, including a smaller increase in non-food (comparison) sales (1.3%). Scottish Retail Consortium/ KPMG.

3.3.2 Looking to the future, [1]Experian forecast that retail spending (convenience and comparison combined) in the UK will increase by 2.2% per annum from 2014-25 and 2.3% per annum from 2021-30. Long term growth forecasts must be treated with considerable caution, though.

3.4 Comparison expenditure growth

3.4.1 Comparison expenditure is vital for town centres, especially the major centres. Experian forecast that comparison spending in the UK will grow at 2.9% per annum from 2014-25 and again at 2.9% from 2021-30. These growth rates are much lower than in past decades. The much lower forecast growth rates for convenience expenditure 0.8% per annum to 2025 and again at 0.8% per annum from 2021-30 explain the overall retail forecasts.

3.4.2 These forecasts are relevant to the TAYplan area and they appear consistent with the modest economic growth forecasts at present, especially against the background of higher unemployment, reduced consumer credit and rising costs of other household burdens, such as fuel and power. The reduced growth in forecast comparison retail expenditure, combined with increased online sales (see below), indicate a reduced role for comparison shopping in many town centres in the future.

3.5 Internet spending

3.5.1 Internet spending is a fast growing element of retail expenditure. It reduces the expenditure available to service conventional shop floorspace.

3.5.2 [2]Experian forecast that non-store comparison retail sales could rise to 21.2% of total comparison spending by 2024

[1] Experian Retail Planner, Briefing Note 11- Figure 1a.

[2] Experian *Retail Planner- Briefing Note 11*, Appendix 3.

and remain at that around proportion up to 2030 as growth tapers off. This forecast is mainly driven by online sales. Experian explain that part of this proportion is associated with shop floorspace, so the forecast deduction from total comparison expenditure relating to shop floorspace should be around 15.9% at these dates, for the purpose of assessing future space requirements.

3.5.3 Many major multiples offer online shopping as well as their high street stores, and the latter provide an essential platform for viewing the goods before online purchases are made. Independent retailers are increasingly offering online shopping too and this can prove very successful for niche and specialist shops. For many small independent retailers though, online shopping poses direct competition, which can only be met by improved quality of offer.

3.6 Shop vacancy rates

3.6.1 Store vacancy rates in the UK increased from 5.4% in December 2008 to 14.1% in August 2013 (The Local Data Company) from a survey covering about 650 centres. The vacancy rate in Scotland is 14.9%, from the LDC survey. The company comment that alternative use or demolition is appropriate for many units where there is no retailer demand.

3.6.2 A different survey reported by the Scottish Retail Consortium, estimates that the UK vacancy rate was 11.9% and the vacancy rate in Scotland was 10%, in April 2013. This puts the Scottish vacancy rate slightly more favourably than the UK. Reasons for the difference with the LDC survey will relate to methodology and possibly the selection of centres. It is preferable that local authorities in the TAYplan area agree on the definition of vacancy rates, such as that applied in this review.

3.6.3 The main reasons for the rise in vacancies since 2008 quoted by market commentators are: the economic slow-down and weak demand; business closures; the rise in internet retail spending; associated changes in the ways of shopping; costs and margins on the high street and reduced consumer confidence generally.

3.6.4 Vacancy rates have stabilised in recent months, but some forecasters predict significant continuation of closures in the coming years if no action is taken to attract people back to the high street. For example, The Centre for Retail Research published a paper *Retail Futures*, May 2013, which estimates that a further 23% of high street stores in Scotland might close by 2018. This represents a loss of about 5,800 shops.

3.6.5 There is now a general consensus that retailing will play a smaller role in town centres in the future, while remaining a key activity. This change emphasises the need to attract people back into town centres and address the over-supply of units currently devoted to retail use.

3.6.6 The over-supply of shops in many traditional town centres is not a new issue, but it is coming into much sharper focus with the current changes in consumer patterns. Many units in traditional town centres are not well suited to modern retail requirements and those on the periphery of the centre are even less so, because of the lower footfalls. Active encouragement of alternative uses for these properties appears the best solution for the future. Alternative uses could include non-retail service businesses or conversion to housing, for example. In their recent report on vacancies, the Local Data Company comment that alternative use or demolition is the only option for the majority of these units. Encouragingly, they report that 500 new leisure units have been created in high streets this year.

3.6.7 At the regional and local level, Table 3.1 shows the current vacancy rates in the TAYplan town centres for this review, expressed in terms of units. Vacancy rates in many of the town centres, including Perth, compare quite well with the Scottish average, with the exception of Arbroath, Brechin, Coupar Angus, Dundee and Kirriemuir, where there are some supply and demand issues. The Scottish average is shown at the bottom of the table.

3.6.8 Information in Table 3.2 contains information on the change in levels of vacant floorspace in the TAYplan town centres since

Table 3.1
Vacant units in the TAYplan town centres- data from 2012 and 2013

	Vacant units	Total units	Vacancy rate %
Regional Centre			
Dundee City Centre	96	571	16.8%
Sub-regional centre			
Perth City Centre	71	524	13.5%
Larger town centres			
Arbroath	41	259	15.8%
Cupar	20	165	12.1%
Forfar	16	241	6.6%
Montrose	20	205	9.8%
St Andrews	10	214	4.7%
Smaller town centres			
Aberfeldy	7	72	9.7%
Alyth	6	44	13.6%
Brechin	28	130	21.5%
Carnoustie	6	72	8.3%
Coupar Angus (includes 6 boarded up units, used for storage)	9	35	25.7%
Kirriemuir	18	92	19.6%
Monifieth	2	49	4.1%
Newburgh	2	33	6.1%
Scottish town centre average			14.9%

Note: vacancy rate= vacant units/ (retail and non-retail service units & vacant units)
Sources: Perth CC, St Andrews, Cupar- Goad 2012. Dundee CC, Angus TCs- Council data 2012.
Newburgh, Alyth, Aberfeldy- Council street counts 2013. Coupar Angus- C A Regneration Trust count 2013
Scottish average- The Local Data Company August 2013

2006. The levels of vacant floorspace have increased in Dundee (possibly due to a few large units), Cupar and Arbroath town centres and to an appreciable extent in Perth and Kirriemuir. Vacant floorspace has diminished since 2006 in Monifieth, Forfar and Carnoustie, with little change in the remaining town centres.

3.6.9 Some town centres have a few prominent vacant or derelict sites and properties that are an opportunity for redevelopment. These are identified in Appendix 1 for the town centres in Angus and Fife, but no similar information has been provided elsewhere.

3.7 Distribution of floorspace in the town centres- trends

3.7.1 The current level and distribution of floorspace in the TAYplan town centres is shown in Table 3.2, including contrast with the position in 2006. It should be noted that not all the data on floorspace is entirely compatible between the local authorities. Some is based on Goad and others are Council estimates. There would be advantage in future agreement on consistency.

3.7.2 The level of comparison retail floorspace in most of the town centres, including Perth, has diminished since 2006, apart from in St Andrews, Forfar and Monifieth. The level of convenience floorspace has increased in the centres of Dundee, Arbroath, Cupar, Montrose, St Andrews and Brechin with slight decline elsewhere. Non-retail floorspace has increased in Cupar, Forfar, Montrose, Brechin and Monifieth, with some decline in the other town centres.

Figure 3.1 shows the current distribution of floorspace by type in the town centres, grouped according to the retail hierarchy in the current TAYplan. The graphs usefully reveal the key importance of Dundee

Table 3.2
Retail and non-retail service floorspace and vacant floorspace in the town centres 2006 and 2012/13- sq m gross

	Comparison floorspace 2006	Comparison floorspace 2012	% change	Convenience floorspace 2006	Convenience floorspace 2012	% change	Non-retail floorspace 2006	Non-retail floorspace 2012	% change	Vacant floorspace 2006	Vacant floorspace 2012	% change
Regional Centre												
Dundee City Centre (2013 data for 2012	95,744	77,273	*-19%*	7,780	8,674	*11%*	44,502	41,301	*-7%*	13,375	24,381	*82%*
Sub-regional centre												
Perth City Centre	71,525	62,147	*-13%*	8,606	7,073	*-18%*	29,389	24,713	*-16%*	11,311	13,629	*20%*
Larger town centres												
Arbroath	16,987	14,899	*-12%*	4,407	6,176	*40%*	18,179	22,822	*26%*	3,366	4,736	*41%*
Cupar (2013 data for 2012)	10,033	8,930	*-11%*	4,411	5,360	*22%*	*	25,260		1,057	4,570	*332%*
Forfar	12,613	13,270	*5%*	2,772	2,740	*-1%*	17,858	19,282	*8%*	2,901	1,996	*-31%*
Montrose	14,691	12,245	*-17%*	1,148	1,616	*41%*	15,166	16,944	*12%*	1,804	1,790	*-1%*
St Andrews (2013 data for 2012)	16,891	18,680	*11%*	3,078	5,810	*89%*	*	18,700		1,610	1,520	*-6%*
Smaller town centres												
Aberfeldy	2,772	1,800	*-35%*	1,810	1,500	*-17%*	*	5,550		*	840	
Alyth	*	700		*	1,350		*	3,300		*	720	
Brechin	5,996	4,109	*-31%*	1,356	1,381	*2%*	8,343	10,157	*22%*	2,788	2,752	*-1%*
Carnoustie	1,352	918	*-32%*	2,970	2,839	*-4%*	5,053	4,888	*-3%*	709	618	*-13%*
Coupar Angus	1,006	800	*-20%*	1,470	600	*-59%*	*	2,100		*	360	
Kirriemuir	2,421	2,432	*0%*	1,306	889	*-32%*	4,990	4,691	*-6%*	1,209	1,434	*19%*
Monifieth	517	1,744	*237%*	3,192	3,187	*0%*	2,609	3,347	*28%*	1,422	118	*-92%*
Newburgh	629	514	*-18%*	507	467	*-8%*	*	1,199		*	146	

Definitions

Non-retail floorspace refers to services and all other uses, as identfied by Goad- see text. *Vacant floorspace* includes retail and non-retail vacancies

Sources

Dundee City Centre in 2006- Dundee Retail Study 2006 Appendix 6, Colliers CRE for convenience and comparison floorspace. For non retail services and vacancies- Dundee Retail Booklet 2007 data

Dundee City Centre 2013 data- from City Council

Perth City Centre in 2006- Perth & Kinross Retail Review 2006 (Goad/Ryden).

Perth City Centre in 2012- convenience and comparison data from 2011 Retail Review (for consistency w ith 2006 approach). Non-retail and vacant floorspance from Goad 2012 TC report.

Aberfeldy, Alyth, Coupar Angus - Perth & Kinross Retail Review 2006 (Ryden estimates) and 2013 surveys of units w ith estimated av unit size

Arbroath, Forfar, Montrose,Brechin, Carnoustie,Kirriemuir,Monifieth (tow n centres)- 2006 and 2012 Angus Council floorspace surveys

Cupar and St Andrew s tow n centres- Fife Retail Capacity Study 2008, from Fife Council 2007 survey (Cupar TC in 2006 has Lidl added - 2,000 sq m- Goad). For 2012, figures are Goad 2013.

New burgh- Fife Council survey in August 2013 -unit count. Floorspace per unit derived from 2007 Council survey.

* = no available data

Figure 3.1 Distribution of floorspace by type in the town centres

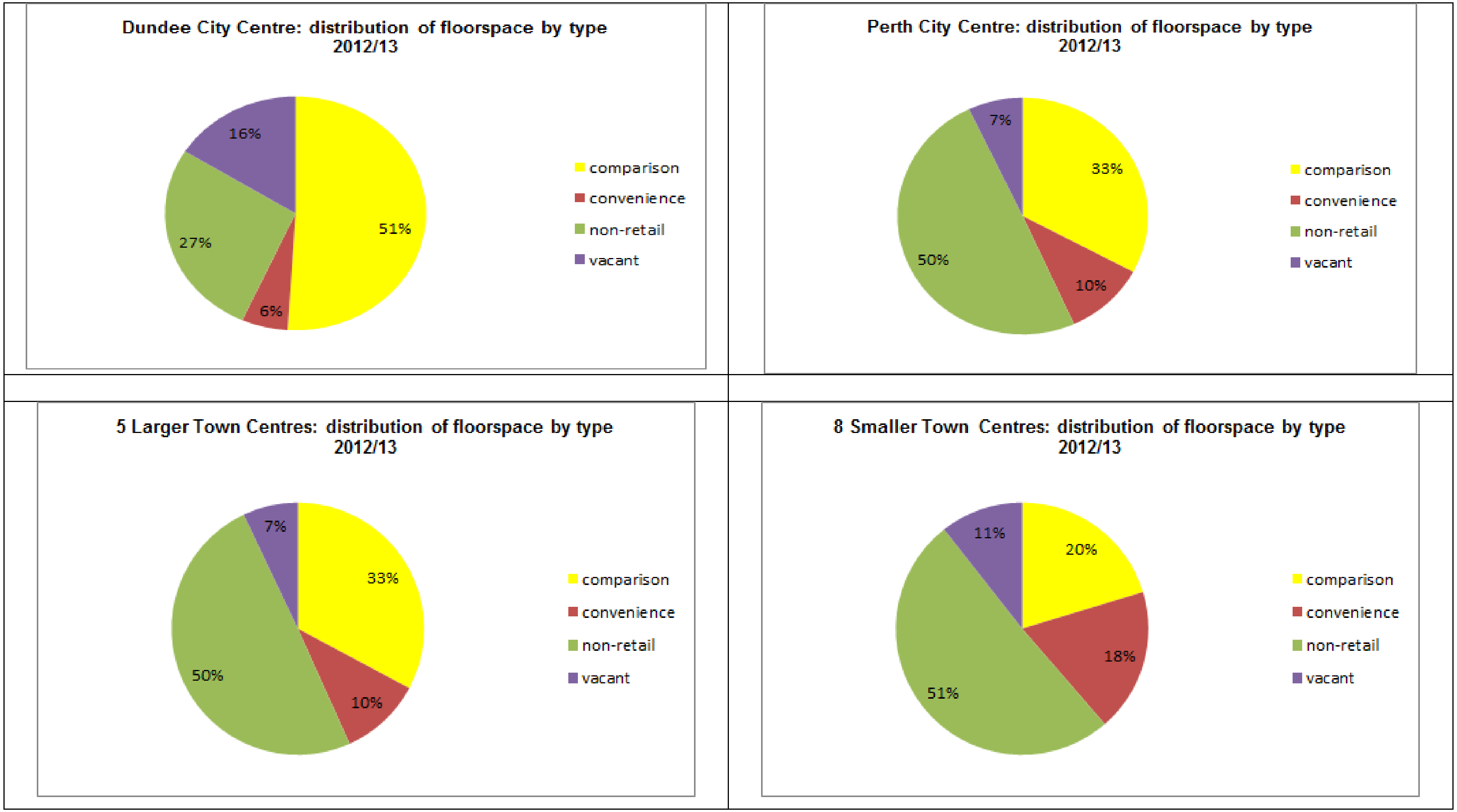
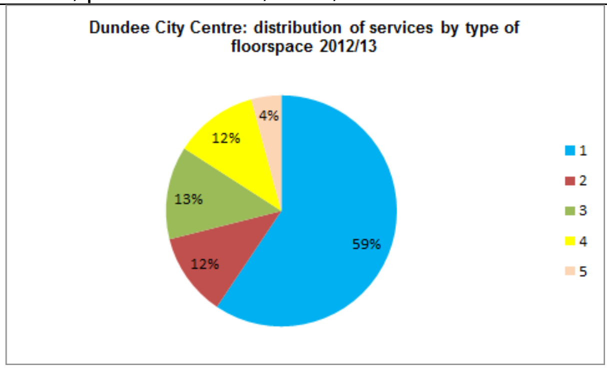
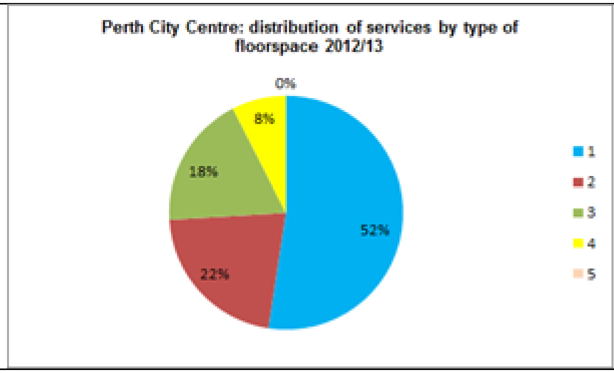


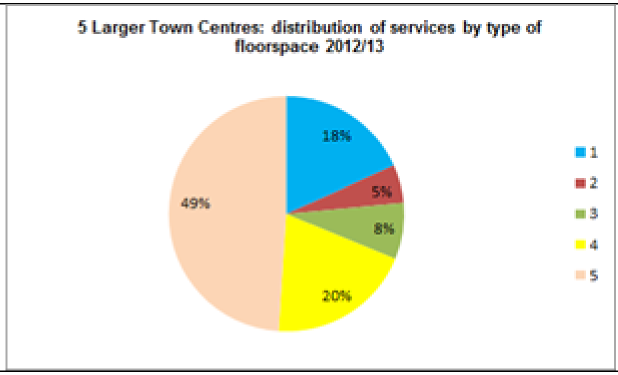
Figure 3.2 Breakdown of non-retail uses in the town centres only, excluding retailing

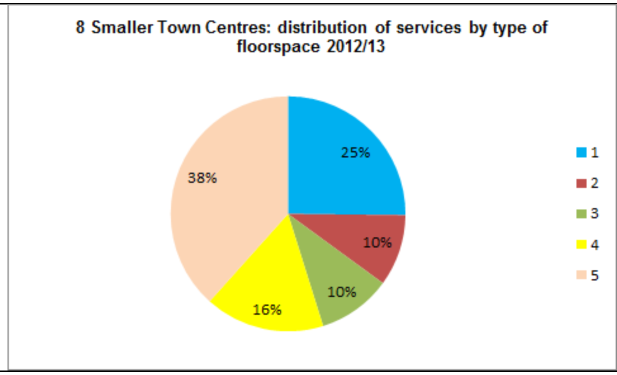
Key

Type	
1	Restaurants, cafes, pubs, take-aways
2	Other services-hairdressers, cleaners, travel agents etc
3	Banks, BS, financial services, insurance
4	Property, offices and professional services
5	Leisure, public services, halls, PO & misc.









for comparison shopping in its role as the regional shopping centre.

3.7.3 Also of interest is the large contribution by non-retail services, which appear as similar proportions (50%) in Perth and the other towns as groups. The lower proportion of comparison retailing and higher proportion of convenience retailing in the small town groups, compared to the larger towns, also reveals their more local function.

3.7.4 Information on the breakdown of non-retail service floorspace is provided in Appendix 2 and summarised in Figure 3.2. It illustrates the high contribution of restaurants/ cafes, pubs and take-aways in the two cities, compared to the other town centres.

3.8 Role of comparison retailing- overview

3.8.1 The information in Table 3.2 and Figure 3.1 illustrates the continuing key importance of comparison retail floorspace to the TAYplan town centres generally, but especially for Dundee City Centre and also in Perth and the larger towns. This statement is reinforced by evidence on retailer demand and retail rents in the following paragraphs, together with addressing the growth in internet retail spending. Nevertheless, the contribution of comparison retailing will be less than in the past, as mentioned earlier in this section.

3.8.2 Comparison retailing still remains the principal reason for visiting the cities and larger town centres, although increasingly allied to other reasons. Among the smaller town centres, comparison retailing is an important contributor to the diversity of these centres, without which all sectors would probably diminish severely, leaving many vacancies.

3.9 Comparison shopping patterns and turnover

3.9.1 The only way to establish comparison (and convenience) shopping patterns is to undertake periodic **retail capacity assessments** for the local authority areas involving household surveys. These need not be undertaken very frequently.

3.9.2 At present, there is information available on the estimated comparison turnover of the town centres in Fife and Perth & Kinross, from fairly recent retail capacity studies commissioned by those Councils. There are no recent comparison turnover estimates for Dundee City Centre or for the Angus town centres. Retail capacity studies would be the best way to provide such information.

3.9.3 Analysis from previous survey-based retail capacity studies indicates that the catchments of Dundee and Perth overlap. Dundee also functions as the main comparison shopping centre for Angus and to some extent, north east Fife. Perth is the main shopping centre for most of the Council area and for part of Fife.

3.10 Pedestrian footfall

3.10.1 Information from the Scottish Retail Consortium from their Springboard Footfall Monitor reveals that pedestrian counts in June 2013 in Scottish town centres were 1.2% higher than a year ago. The equivalent UK figure was only 0.1% up. However, Experian predict that town centre footfall will decline because of changing consumer trends in their *Town Centre Futures 2020* report, dated 2012.

3.10.2 In the TAYplan area, footfall monitoring occurs in the Dundee shopping malls and in Perth City Centre. There are anecdotal reports of a rise in Dundee footfall in the malls, and some decline in footfall in Perth. While footfall was recorded in the Angus towns in 2010, there is no overall trend data, nor amongst other towns in the TAYplan area.

3.11 Retailer demand and multiple representation

3.11.1 Demand nationally is generally at low ebb, with levels well down on the position five to ten years ago. Demand by comparison multiples is increasingly concentrated in the cities and in large commercial shopping destinations such as Glasgow Fort. Although multiples account for about 1% of the numbers of retail businesses, they account for about 70% of sales. Demand in the larger towns is confined to the prime pitches, with limited interest in smaller towns. Recent years have seen a strong rise in the budget sector, with

Table 3.3
Multiple retailer representation in the TAYplan town centres- 2012 / 2013

	Multiple retailers	Total convenience & comparison units	% multiples
Regional Centre			
Dundee City Centre	168	240	70%
Sub-regional centre			
Perth City Centre	104	280	37%
Larger town centres			
Arbroath	15	83	18%
Cupar	9	65	14%
Forfar	9	88	10%
Montrose	18	76	24%
St Andrews	25	130	19%
Smaller town centres			
Aberfeldy	1	28	4%
Alyth	2	15	13%
Brechin	4	43	9%
Carnoustie	3	25	12%
Coupar Angus	1	12	8%
Kirriemuir	3	33	9%
Monifieth	3	20	15%
Newburgh	1	15	7%

Note: this table refers to multiple retailers only, excluding service multiples
Sources: Perth CC, St Andrews, Cupar- Goad 2012. Dundee CC, Angus TCs- Council data 2012.
Newburgh, Alyth, Aberfeldy- Council street counts 2013. Coupar Angus- C A Regneration Trust count 2013

stores such as Primark, B&M and others. Most of these are large space users, which can be difficult to accommodate in some town centres.

3.11.2 Town centres are also facing competition from retail parks in some cases, as the owners seek to gain relaxation on existing restrictions on range of goods. This is a significant planning issue, because of the potential for increased competition with town centres and the potential loss of space for bulky goods / large format retailers. Consumer patterns have also changed, with shoppers increasingly seeking centres whichoffer 3shopping and leisure choices, with ready accessibility

3.11.3 Among the smaller towns, which include most of the towns in the TAYplan area, independent retailers are the mainstay, and these operators increasingly have to offer quality and/ or niche ranges of goods to compete. Collectively in any town centre, it is becoming critical that these retailers, combined with non-retail services, continue to attract people into the town centre.

3.11.4 The list of known current retailer requirements (demand) to locate in the TAYplan town centres is shown in Appendix 3, based on research by Ryden. These requirements refer to national multiples, rather than to independent operators, where demand is usually ad hoc and local, with no published requirements. The list is evidence that the concentration of multiple demand is on the cities. Caution should be applied when interpreting the list of requirements, because multiples often have recorded requirements for many locations and there is no way of knowing their priorities.

[3] Business Improvement Districts Scotland-Vacancy Report, 2011

3.11.5 Table 3.3 shows the extent of multiple retailer representation in the TAYplan town centres. The percentage refers to the number of multiple retailers as a proportion of the convenience and comparison retailer combined.

3.12 Retail rents and yields

3.12.1 Zone A retail rents are a measure of the supply and demand for retail property. Rents in Scotland generally have been in slow decline since 2008, which reflects the economic conditions. Local conditions vary and in some towns, rents have increased. Table 3.4 shows the current retail rents in the town centres, together with recent trends since 2008 (Source: Ryden).

3.12.2 Commercial property yields reflect the market capital values of property as an investment. Yields reflect revenue performance and anticipated future performance and risk. Thus, for example, low yields indicate higher value properties. In many smaller towns, the yields are similar because there are limited transactions. Table 3.3 also shows the yields in the TAYplan town centres (Source: Ryden).

3.13 Leisure spending

3.13.1 Leisure spending refers to expenditure on recreational and sporting activities, cultural services, games of chance/ lottery, restaurants, cafes, pubs, holiday accommodation and hairdressing/ grooming. Many of these activities attract people into town centres and contribute towards the economic base, alongside shopping. [4]Experian predict that leisure spending in the UK will grow by 1.7% per annum from 2013-29.

3.13.2 This role of this sector is likely to become increasingly important in the TAYplan town centres in the future.

3.14 Visitor spending

3.14.1 Visitor spending is an important contributor to the prosperity of town centres; indeed it is critical in cases where centres largely rely on visitor spending. Proposed new developments, such as the V&A in Dundee, can expect to increase visitor spending in the TAYplan area. Tourism is a competitive business, so it will be essential to maintain continued investment in town centres in the TAYplan area.

3.14.2 In [5]2011, GB visitors spent £82 million in Angus and Dundee and overseas visitors, £34 million. It was estimated that tourist related jobs were 3,200 in Dundee and 5,100 in Angus. In Perth & Kinross, GB visitors spent £180 million and overseas visitors £35 million. Tourism related employment is estimated at 8,000 jobs. In Fife, GB visitors spent £74 million and overseas visitors £59 million, but only part of these figures relate to the TAYplan area. It is likely that a substantial part of the overseas expenditure is associated with St Andrews.

3.14.3 In 2009, visitor (GB and overseas) spending was £105 million in Angus and Dundee combined, so the figures for 2011 reveal an upward trend. In Perth & Kinross, combined visitor spend was £141 million in 2009. In Fife it was £184 million in 2009, which is higher than in 2011, caused mainly by reduced overseas spending.

3.15 Consumer perceptions of town centres

3.15.1 Public perceptions of town centres are one of the main drivers of change in town centres. Most research on attitudes to town centres is at a local level through questionnaire surveys, often in support of town centre planning and regeneration initiatives, or as part of a questionnaire on shopping patterns. So the research is usually purpose-driven, rather than academic. Nor is there much published perception survey evidence that reveals trends over the last five years, say.

3.15.2 Of interest to the TAYplan are what factors commonly encourage people to visit town centres, and what discourages them. Some examples are provided in the following paragraphs.

[4] Experian Retail Planner, Briefing Note 10.1- Figure 2.

[5] VisitScotland research data for 2011

Table 3.4

Zone A prime retail rents and commercial property yields in the TAYplan town centres 2008-13 (Ryden)

Town Centre	Prime rent 2008 (£ per sq.ft)	Prime rent 2013 (£ per sq.ft.)	Comments		Prime investment yield 2008	Prime investment yield 2013	Comments
East Fife							
Cupar	12	20	£15.50 achieved, £20 is opinion		no evidence	no evidence	7.8% achieved
St Andrews	55	60	Zone A rents		no evidence	no evidence	6% achieved
Newburgh	no evidence	no evidence	mainly owner occupier		no evidence	no evidence	no evidence
Dundee City							
Dundee	105	90	Zone A rents		6.30%	7.10%	achieved
Perth & Kinross							
Perth	72.5	65	Zone A rents		no evidence	8 - 10%	5.5% achieved
Aberfeldy	no evidence	12 - 15	opinion		no evidence	no evidence	10% achieved
Alyth	no evidence	no evidence	mainly owner occupier		no evidence	no evidence	no evidence
Coupar Angus	no evidence	no evidence	mainly owner occupier		no evidence	no evidence	no evidence
Angus							
Arbroath	16 (achieved)	25	opinion, £16 achieved		no evidence	no evidence	7.2% achieved
Forfar	12 (achieved)	22	opinion, £12 achieved		5.70%	no evidence	9.8% achieved
Montrose	no evidence	25 - 30	opinion, £24 achieved		no evidence	no evidence	8.2% achieved
Brechin	21	no evidence	£20 achieved		no evidence	no evidence	7.3% achieved
Carnoustie	7.50 (achieved)	15	opinion, £10 achieved		no evidence	no evidence	no evidence
Kirriemuir	no evidence	10	significantly owner occupied, £10 achieved		no evidence	no evidence	no evidence
Monifieth	11 (achieved)	15	opinion		no evidence	no evidence	no evidence

Note- Where ‘no evidence’ is stated, this refers to no recorded property transactions upon which to assess the rents, yields etc.

3.15.3 Perth City Centre Management has just published the results of the Scotpulse consumer survey for Perth, based on fieldwork conducted in September 2013. The survey invited a responses on a range of issues, including origins, reasons for visiting Perth, the shopping experience and what could be improved.

3.15.4 The survey indicated that nearly half the visitors came from outwith the Perth area. Shopping was the main reason quoted by respondents from within the area, but 'day out' was the main reason for many of those from Edinburgh and Falkirk. The good range of shops, accessibility and good specialist shops were the main attractions. Respondents also wanted more/ better shops and improved parking and more information on events.

3.15.5 Fife Council published their last *Town Centre Perception Survey 2008*, which included over 1,000 completed questionnaires, addressing issues on the town centres of Dunfermline, Glenrothes, Kirkcaldy and St Andrews.

3.15.6 People were asked what they considered important in any town centre generally. The highest rated features included: *cleanliness and appearance, availability of parking, mix and quality of shops and street facilities*. The availability of *public transport, cafes and 'atmosphere'* were also frequently mentioned. St Andrews town centre scored very highly, except for parking and street facilities

3.15.7 The survey also asked people to identify what improvements should be made. The most frequent responses included *more/ better shops, better parking and more facilities*. Kirkcaldy town centre was identified as needing regeneration. The respondents were also asked how these improvements would change their attitude. The great majority said that they would *visit more often, stay longer and spend more*. There were also some shopping related questions on town centres in the Fife Household Shopping Survey in 2009.

3.15.8 Angus Council undertook public perception surveys in all its town centres in 2012, using the Peoples' Panel. The surveys were more detailed and covered more issues than the older surveys in Fife, including the evening economy. The responses highlighted the importance of the town centre environment, general accessibility and 'having things to do', in addition to the range and quality of shopping, cleanliness and parking as the most sought after features.

3.15.9 In 2007, South Lanarkshire Council commissioned a set of town centre surveys involving over 2,000 interviews in the main towns. The findings contained rather similar types of response to those mentioned in the previous paragraphs. Interestingly, the surveys also asked people about their awareness/ visitation of local cultural/ heritage.

3.15.10 The Department for Social Development in Northern Ireland commissioned consultants to undertake public perception surveys covering various towns during 2010/11 through the use of household interview surveys and shopper surveys. The purpose was to support town centre masterplan regeneration initiatives. These included Newry, Coleraine, Ballycastle and Ballymoney, plus other small towns (2012).

3.15.11 In general, the responses identified rather similar popular/ unpopular town centre features as the studies in Fife, Angus and South Lanarkshire. These surveys in Ireland also asked respondents to describe their local town centre overall as a place to visit- good and bad points. This type of question assisted the definition of its 'sense of place', especially when combined with questions on purpose of visit and what other activities than shopping. The surveys asked the respondents whether they are now visiting other town centres more often, compared to the past.

3.15.12 Perhaps the main point arising of the town centre perception surveys is that it is always a combination of factors that begin to define the quality of a town centre.

3.15.13 The next section addresses the selection of health check indicators.

4 Development of health check indicators- format

4.1 Introduction

4.1.1 Following the External Review Group's report on town centres and the draft SPP referred-to in section 2, there is a need to develop a set of town centre health check indicators which assess the performance of town centres as a whole entity. The four Authorities within the TAYplan area will determine what indicators they use and the degree of consistency. To assist and help inform the Authorities this report considers health check indicators.

4.1.2 This section sets out a suggested method of collecting information for each indicator and how it could be presented in a consistent *format* within the TAYplan area. Application of these health check indicators is then provided in summary form in Section 5. The advice in this review, though, is intended to apply to full health checks in the future, not just the summaries.

4.1.3 The selected health check indicators for the TAYplan town centres are based on those described in the draft SPP and in the External Review Group's report. The indicators were developed in discussion with the TAYplan, plus consultation with external bodies, including members of the External Review Group and other parties.

4.1.4 To be effective, indicators have to relate to a consistent database, whether numeric or subjective by nature. This report considers that the objective should be to establish a shared system of common indicators among the four local authorities, with agreement on the data to be collected and monitored.

4.1.5 If the Authorities wish to have a common set of indicators, it is also relevant that agreement is reached on the frequency of monitoring by the TAYplan local authorities, while allowing some flexibility. In general, there is unlikely to be value in monitoring the health check indicators more frequently than every two years. Also, local authorities would be constrained by time and resources.

4.2 Selected TAYplan health check indicators

4.2.1 In this review, the indicators listed below have been selected and the remainder of this section considers issues relating to the method of data collection and presentation of each indicator.

- Pedestrian footfall
- Diversity of uses and change
- Quality of built environment
- Recent and proposed investment
- Strategic accessibility
- Attitudes and perceptions
- Retailer representation and demand
- Commercial yields and retail rents
- Vacancy rates
- Cultural and social events
- Leisure and cultural facilities
- Sense of place
- Town centre residential population
- Employment in the town centre
- Street safety

4.3 Pedestrian footfall

4.3.1 Pedestrian footfall is a basic indicator of the vitality of town centres. Mostly, pedestrian counts are undertaken regularly in shopping malls, and more occasionally by local authorities in town centre streets.

4.3.2 As mentioned in section 3, pedestrian flow monitoring is undertaken in the Dundee malls and in Perth City Centre and has been recorded in the Angus towns in 2010. However, there is no comprehensive trend information covering all the town centres.

4.3.3 It is recommended that pedestrian flow counts are extended to all the centres every two years, say. The counts only need to be on a few prime pitch locations. There may be an issue of access to data in private shopping malls in Dundee for example. A suggestion is that the results of count points in towns are combined to show a percentage change over a period (up or down), taken to represent the whole town centre. This may suffice for strategic planning purposes.

4.4 Diversity of town centre uses and change

4.4.1 It is suggested that text is used to provide an overview for each town centre, highlighting any particular features, followed by the data analysis. Statistical information for the TAYplan town centres is provided in section 3. The overview could apply summary descriptions such as *wide variety, medium variety and limited variety.*

4.4.2 The two main sources of data commonly used are the Assessor and Goad, aside from town centre land use surveys. There are difficulties in establishing a comprehensive land use assessment from the two sources mentioned. Data from the Assessor requires some interpretation for planning purposes and data from Goad may not have complete coverage and data on upper floor properties is scarce. Furthermore, there is limited Goad coverage of small towns.

4.4.3 Both the Assessor and Goad are excellent sources of floorspace data relating to commercial and community uses, and they represent practical sources for ready monitoring- see Table 3.2. In the TAYplan area, town centre floorspace data for Dundee and Angus is largely Assessor- based, whereas in Fife and Perth & Kinross it is largely based on Goad, with estimates applied to small towns without Goad coverage. In fact, street surveys provide a ready way of quickly bringing the information up to date in smaller towns, while applying average unit sizes to the unit counts.

4.4.4 The main point is that the records for each local authority should adhere to their chosen database for consistency over the years.

4.4.5 Another issue is how to treat town centre land uses which are not included, or readily integrated with, the commercial/ community use floorspace data, such as in Table 3.2 and Figure 3.1 in this review. For example, this includes housing, other uses and sites. There is a lack of information on housing numbers in the town centres, apart from in the Angus town centres.

4.4.6 It is probably unnecessary to monitor the diversity of use more frequently than every two years.

4.5 Quality of built environment

4.5.1 This indicator is best applied in the form of a written description for each town centre. Aside from the Angus town centres, it should be developed for the other town centres in the TAYplan area in a consistent way. Brief reference should be made to key features, such as historic aspects, general appearance and any outstanding problems, such as the extent of vacant properties or lack of facilities for town centre users. Surveys of public perceptions offer the best way forward to provide a more comprehensive assessment.

4.6 Recent and proposed investment

4.6.1 A brief written description should highlight significant development projects and regeneration initiatives. A way of assessing proposed investment would be to monitor town centre planning approvals to record changes in activity.

4.7 Strategic accessibility

4.7.1 As an indicator, the emphasis needs to be on accessibility between the centres and ease of movement within the centres. The assessment would indicate the ease with which the public can visit town centres. The indicator requires a brief description, combined with evidence of the levels of accessibility for each town centre to include car parking, bus services and rail services.

4.7.2 Appendix 4 shows the current off-street and on-street car parking spaces in the TAYplan town centres. Appendices 5 and 6 show the bus and train services. It is important that any major access improvements are recorded in the monitoring process.

4.8 Attitudes and perceptions

4.8.1 Aside from the recent perception surveys in the Angus town centres, there are no recent surveys in the other TAYplan town centres. It is recommended that a common form of survey questionnaire is applied, with questions which consider views on the town centre a whole and whether people intend to change their use of the centre, for example. In other words, include questions which seek the beginning of any trends.

4.9 Retailer representation and demand

4.9.1 As an indicator of the strength of the retail offer in town centres, it is important to show the proportion of multiple retailer representation, while also commenting on the quality of the independent retailers. Information on the retailers is readily collectable as part of any retail floorspace survey. Information on retailer requirements (demand) is probably best collected by an outside agency for consistency and access/ experience with commercial data. Additional information and commentary may be available from local authority regeneration staff and town centre managers.

4.10 Commercial yields and retail rents

4.10.1 This data can readily be collected every two years and presented in the sort of format shown in section 3. Again, the use of an outside agency will assist with achieving consistency.

4.11 Vacancy rates

4.11.1 The information can be collected as part of the floorspace survey information. When quoting vacancy rates, it is important that consistency is achieved. For example, it is probably more useful to express vacancy rates in terms of units, rather than floorspace, because it enables comparison with national vacancy rates. Also, consistency in the denominator is important. In this review, vacancy rates are expressed as: *vacant units/ (retail units+non-retail units and vacant units).*

4.11.2 As a separate but related issue, it may be worth highlighting any major vacant or derelict sites in the town centres which represent a visibly undesirable feature, or a significant development opportunity in the town centres. The list is better kept to a minimum, in order to focus on the principal problem/ opportunity areas.

4.12 Cultural and social events

4.12.1 Cultural and social events contribute strongly to the sense of identity associated with town centres, including community involvement. The best way to present this indicator is to list the main events associated with each town centre and provide brief commentary. Investigation of web links provides useful information.

4.13 Leisure and cultural facilities

4.13.1 It is important to highlight the main venues and facilities located within each town centre, in order to reveal the extent to which these contribute to the range of land uses and vitality of the town centres. Again, this can be achieved with text, and in some cases, reference could be made to key facilities outside town centres where there is a relationship or context. Investigation of web links provides useful information.

4.14 Sense of place

4.14.1 This indicator is a subjectively expressed combination of the results of applying the other indicators, with an emphasis on the quality of environment, diversity of offer and social, historical and cultural associations. It should distil the defining characteristics of any town centre into a few words or images.

4.14.2 In order to achieve some consistency in comparing the sense of place in different town centres, it is suggested that the depiction could relate to their role in the hierarchy of centres, as set out in the current TAYplan.

4.15 Town centre residential population

4.15.1 The residential population of town centres often contributes strongly to the economy of that centre and its vitality generally, including the evening economy. Estimates of housing in the Angus town centres have been made, but not among the other town centres in the TAYplan area.

4.15.2 A baseline estimate of town centre populations could be achieved from a geo-mapping exercise, by applying the population at a detailed level by postcode address, which is already available from the 2011 Census. It would probably require to be conducted by a specialist agency. Monitoring of change could be achieved by reviewing annual house completions.

4.16 Employment in town centres

4.16.1 Assessment of the concentration of employment in town centres would provide a valuable indicator of their contribution to the local economy. The difficulty lies in gathering information on employment which would also need to be broadly accurate to serve any useful purpose. It would require knowledge of the number of businesses and employees in the town centres. While it may be possible to draw on Nomis data for the cities, this is likely to be more difficult for the smaller towns. Rough estimates could probably be made, based on the number of retail and non-retail units and applying ratios of employees per unit or area.

4.17 Street safety

4.17.1 Crime is among the list of indicators identified in the current and draft SPP. Reported crime in town centres can be monitored by liaison with the local police. Data on recorded vandalism, shoplifting, drug dealing and occasional attacks can be recorded. Other areas of public concern are loitering and the perceived risk of attack or robbery in some town centres.

4.17.2 For planning purposes, it is probably sufficient to comment on persistent problems, where they exist and monitor changes accordingly. Some information on crime is included in the health checks for the Angus town centres. In general, it appears more relevant to present the subject under the limited heading of ‘street safety’ which is more relevant to planning and the environment of town centres.

4.18 Summary

4.18.1 It is recommended that the health check indictors described in this section are applied to the town centres in the TAYplan area in the format suggested. However, the indicators relating to assessment of the residential population and employment in the town centres require to be developed. It maybe however, that the indicators suggested do not all apply to all town centres, e.g. the district centres in Dundee.

5 Town centre health check summaries

5.1 Introduction

5.1.1 This section contains health check summaries for each of the 15 TAYplan town centres under review. The applied indicators are those described in section 4, which encompass an holistic approach to town centre performance assessment, as promoted by the draft SPP and the National Review of Town Centres External Advisory Group Report

5.1.2 The purpose of the summary health checks is to contribute towards informing the next TAYplan, by identifying key characteristics of the town centres, including their strengths and weaknesses. This exercise is also the first time health checks have been presented in the same format among the TAYplan local authorities.

5.1.3 Each health check summary occupies one page and these are presented in the order of the hierarchy of the town centres.

5.2 Themes emerging from the health checks

5.2.1 Review of the health checks indicates that there are no failed town centres as all have positive attributes, although to varying degrees. Some common themes on how to attract more people into town centres emerge from review of the health check findings:

- The need to continuously invest in the appearance and quality of environment to encourage people to linger;
- Highlighting of historical buildings and local history, to strengthen the 'sense of place';
- Providing a good retail offer for the size of town, including specialist shops;
- Providing a good range of non-retail services, especially good quality cafes and restaurants;
- The better performing town centres usually had more diversity of uses relative to the others;
- Addressing lingering areas of vacant or derelict properties;
- Actively promoting events and 'things to do' in the town centres; and
- Ensuring good accessibility within the town centres, through the road system, signage, parking, pedestrian access and public transport.

5.2.2 The health checks and data review indicate that Dundee and Perth are the most appropriate locations for major new comparison shopping. The two cities have a complementary relationship. Dundee has the most potential for large scale increase in activity, including speciality retailing and visitor attraction through the Waterfront Development, including the V&A. Perth has most potential for increasing its attraction for visitors, attracted to its specialist shops and attractive range of cafes and restaurants. Both the cities offer the main potential for developing their evening economies in the TAYplan area. The other towns are generally too small to achieve any radical change.

5.2.3 Among the larger towns, St Andrews is unique in terms of its combination of historic town centre, University, very good shops and as the Home of Golf with an international appeal. The other larger towns, and the smaller towns, will still require some intervention to secure a more modest future.

Dundee City Centre indicators 2012/13 TAYplan role: Regional Centre	Sources/ Assessment
Pedestrian footfall	Survey in eight locations in the City Centre by Beacon Research in 2006 (Colliers' Study). Busiest in the Overgate Centre on Saturdays and by M&S at the Murraygate and by RBS on weedays. The count at the Wellgate Centre ranked fourth busiest. Current footfall recording at the Overgate, Wellgate and the Murraygate *(anecdotal- rising).*
Diversity of uses and change	Wide level of variety, including retailing and commericial uses, public services, community uses, arts, leisure, halls, museums, conference facilities, tourism and residential. University town. Downward trend in comparison retail floorspace since 2006.
Quality of built environment	High quality with modern shopping centre and continued investment, such as the significant recent improvements to City Square. Existing and proposed major regeneration and investment will uplift the quality. Conservation area with support from City Heritage Trust Grant (£0.75m)
Recent and proposed investment	Dundee City Square Dundee regeneration (£2.2 m). Waterfront Masterplan- leisure, retail, hotel, offices, civic uses, including forthcoming £45m V&A Museum. Major proposed investment at the Wellgate (multi screen cinema, restaurants, cafes and leisure outlets). Proposed extension to the Overgate.
Strategic accessibility	Dundee is a gateway between central Scotland and the north east, located on the A90 and A92, linking the central belt, Perth and Aberdeen. The City is highly accessible from destinations throughout the central belt, the north east, and most of the principal settlements in the TAYplan area. It has good rail links, with a proposed new station concourse. Parking and bus services- see appendices. P&R at Dundee West.
Attitudes and perceptions	No known recent consumer surveys on attitudes to the City Centre- (need further information).
Retailer representation and demand	Regional shopping centre with substantial multiple representation (168) or 70%. Dundee has by far the highest level of comparison retail floorspace in the TAYplan area. The Wellgate Centre has seen openings by retailers: Pavers Shoes, Brighthouse and Bears & Buddies (toys). 16 retailer requirements- see Appendix 3
Commercial yields **Prime rental values**	7.10% £90 per sq ft - down from 2008- see Table 3.4
Vacancy rates % = vacant/ (retail +non retail +vacant)	Dundee City Council 2013 data: 16.8% (96 units out of a total of 571 TC units).
Cultural and social events	Annual photographic exhibition, Dundee Womens' Festival, Spring Festival, jazz and blues, October Fest, Literary Festival, Film Festival, Science Festival and others. Dundee bid to become UK City of Culture in 2017
Leisure and cultural facilities	Dundee Contempory Arts, McManus Gallery, forthcoming V&A Museum, Rep Theatre, Conserts & conferences (Caird Hall), museums, Science Centre, Discovery Point, Olympia leisure pool, cinema, dining out, cafés. Very good provision.
Sense of place	Dundee Partnership Single Outcome Agreement. Regional shopping centre/ arts/ culture with strong identity
TC residential population	
Employment in the TC	
Street safety	

Perth City Centre indicators 2012/13 TAYplan role: Sub-regional Centre	Sources/ Assessment
Pedestrian footfall	Weekly surveys on High St & St John's street by City Centre Management. Downward trend over last 3 years. No detail supplied
Diversity of uses and change	Wide level of variety, including retailing and commericial uses, public services, community uses, arts, leisure, halls, conference facilities and residential. Café Quarter & Cultural Quarter present. Downward trend in retail floorspace in the City Centre.
Quality of built environment	High quality, with City Centre covered as Conservation Area with a high number of listed buildings. A number of buildings require repairs and substantial investment. See *Perth Conservation Area Appraisal, 2008*
Recent and proposed investment	Recent upgrading of pedestrianised central area. Some investment in St Johns Shopping Centre completed with River Island opening and H&M open. St J trading well. Proposed £1.2 m investment into Mill St to improve pedestrian linkages. See also *Invest in Perth* and the associated *Perth City Plan 2013-23.* More investment needed.
Strategic accessibility	Perth is a transport nodal point within Scottish road and rail network, providing good accessibility to the Central Belt and to the North East. Good potential for attracting more visitors and shoppers. Parking and bus services- see appendices
Attitudes and perceptions	Anecdotal evidence of lack of provision for shoppers aged 16-24. (CC Management). This should improve with the new retailers at St Johns- see investment. No known recent consumer surveyon attitudes to the City Centre.
Retailer representation and demand	Goad 2012: good multiple retailer represenation at 37% - (104/ 280) Good quality independent retailers, including specialist shops. CC Management report a popular demand for representation by Starbucks,Mcdonalds and KFC. 11 retailer requirements- see Appendix 3. Major comparison shopping centre.
Commercial yields **Prime rental values**	8%-10%, with 5.5% achieved £65 per sq ft. Down from 2008- see Table 3.4
Vacancy rates % = vacant/ (retail +non retail +vacant)	Goad 2012: 13.5% (71 units out of a total of 524 TC units). Similar to Goad average for UK town centres. Note that the vacancy rate in Dundee CC is based on 2013 Council data, therefore may not be precisely compatible with the Perth data.
Cultural and social events	An events programme for the City Centre is being developed. Key events will include a Kilt Run, Winter Festival and sporting events. Aim to have more festivals. Farmers' Market in the City Centre. Also Perth Show and Highland Games.
Leisure and cultural facilities	Theatre & Concert Hall (Horsecross), museums, galleries, leisure pool, ice rink, cinema, dining out, cafes and city centre walks. Overall provision is good.
Sense of place	Very strong identity, and a significant visitor destination, including for shopping.
TC residential population	
Employment in the TC	
Street safety	

Larger Town Centres

Arbroath Town Centre indicators 2012/13 TAYplan role: Larger Town Centre	Sources/ Assessment
Pedestrian footfall	Recorded in Angus Town Centre Health Checks 2010. Arbroath and Montrose TCs busiest among the Angus towns.
Diversity of uses and change	Medium level of variety, including retailing and commericial uses, public services, community uses, theatre, leisure, halls, and residential. High proportion of non-retail service floorspace. Highest level of comparison retail floorspace among the Angus TCs, but fallen since 2006. No budget hotels- a limitation for business and visitors
Quality of built environment	Parts of the town centre have distinctive character, but marred by some degredation, poor quality development and the level of vacant units. The Abbey is a distinct and welcome feature by the town centre.
Recent and proposed investment	More investment in the fabric of the town centre buildings needed.
Strategic accessibility	Located on the eastern edge of the TAYplan area. Good frequency of bus service relative to other Angus towns. Rail connections. Off-street parking relatively good. Pedestrianised high street. Car parking and bus services- see appendices.
Attitudes and perceptions	Angus Citizens' Panel Survey 2012 on town centres. Findings on Arbroath TC indicate good accessibility and parking, TC good as a place to shop but limited range, poor shop frontages. Restaurants and cafes satisfactory. Street safety satisfactory
Retailer representation and demand	Good multiple representation for size at 18% of retail units (15/83- Council survey 2012). Higher proportion of charity shops and discount stores than most other Angus towns. Low proportion of specialist retailers. Currently 4 retailer requirements- see Appendix 3
Commercial yields **Prime rental values**	7.2% £25 per sq ft- see Table 3.4
Vacancy rates % = vacant/ (retail +non retail +vacant)	Council survey 2012: 15.8% (41 units out of a total of 259 TC units). The level of vacancies affects the environmental quality. Vacancy rate quite high. There were 34 vacant units in 2006.
Cultural and social events	Annual Sea Fest, Bell Rock Blues Festival, Accordion & Fiddle Festival
Leisure and cultural facilities	Webster Memorial Theatre (numerous events/ music), sports centre and swimming pool, Arbroath Harbour Visitor Centre nearby
Sense of place	Could be improved. Limited environmental quality, with nowhere to linger. Famous for the 'Arbroath Smokie' adds character. Good views of the Abbey
TC residential population	About 420 residential properties recorded in the Town Centre Health Check 2010- estimate around 900 people.
Employment in the TC	Significant manufacturing in Arbroath, compared to the other Angus towns, but out of centre.
Street safety	Shoplifting more of a problem in Arbroath compared to most other towns (Health Checks 2010).

Cupar Town Centre indicators 2012/13 TAYplan role: Larger Town Centre	Sources/ Assessment
Pedestrian footfall	No recent survey data
Diversity of uses and change	Medium level of variety, including retailing and commericial uses, public services, community uses, halls, and significant residential. Fair range of cafes and restaurants. Former administrative centre. Cupar Court scheduled to close. Level of comparison retail floorspace appears stable over the years.
Quality of built environment	High quality with conservation area and listed buildings- also see Investment below. Increasing shop vacancies a potential threat to the environmental quality.
Recent and proposed investment	Need for continuing investment in historic frontages through grants and direct intervention, with support for new community enterprise. Recent award of CARs funding and Heritage Lottery Funding for a townscape initiative. Need funding for the proposed relief road.
Strategic accessibility	Located on the south eastern part of the TAYplan area. Roughly equidistant from Glenrothes and Dundee (13 miles to each). Serves a commuter function. New Cupar relief road proposed to overcome the issue of traffic congestion from the main road running through the centre. Car parking and bus services- see appendices.
Attitudes and perceptions	No recent survey data.
Retailer representation and demand	Multiple retailer representation: 14% (9 out of 65 conv and comp units- Goad 2013). The independent retail sector has good variety, with a number of specialist shops. Anecdotal perception is that many businesses are fragile at present. Limited retailer demand, particularly by multiples. 3 retailer requirements- see Appendix 3
Commercial yields **Prime rental values**	7.8% £20 per sq ft-see Table 3.4
Vacancy rates % = vacant/ (retail +non retail +vacant)	Goad 2013 (provided by Council): 12.1% (20 units out of a total of 165 TC units). Consideraly increased vacancies since 2006.
Cultural and social events	Cupar Arts Festival, farmers market, annual flower show and other events. Council report a proposal to promote a food theme in the town centre.
Leisure and cultural facilities	Library, halls, sports centre & pool (out of centre)
Sense of place	Good- market town feel in a restored historic environment. Strong community engagement reported by the Council. Functions as a rural service centre and commuter town.
TC residential population	
Employment in the TC	Estimated at c 400 in the TC- from *12 Fife Town Centres*- Council research paper in 2013
Street safety	

Forfar Town Centre indicators 2012/13 TAYplan role: Larger Town Centre	Sources/ Assessment
Pedestrian footfall	Recorded in Angus Town Centre Health Checks 2010. Third busiest among the Angus towns, behind Arbroath and Montrose.
Diversity of uses and change	Medium level of variety, including retailing and commericial uses, public services, community uses, leisure, halls, and residential. High proportion of non-retail service floorspace. Good selection of restaurants and cafes to support the evening economy. Rise in comparison retail and non-retail floorspace since 2006
Quality of built environment	Good qualtity historic streetscape . Well maintained.
Recent and proposed investment	Some recent investment in the town centre food and drink sector, but more investment needed generally.
Strategic accessibility	Located on the north eastern edge of the TAYplan area. Good frequency of bus service relative to other Angus towns. Close to Dundee. Off-street parking relatively good. Car parking and bus services- see appendices.
Attitudes and perceptions	Angus Citizens' Panel Survey 2012 on town centres. Findings on Forfar TC indicate good accessibility and parking, TC satisfactory as a place to shop. Restaurants and cafes satisfactory. Street safety satisfactory
Retailer representation and demand	Good mix of shops selling high and low value goods (Council Health Check 2010- comment). Limited multiple representation for size at 10% of retail units (9/88- Council survey 2012). 2 retailer requirements- see Appendix 3
Commercial yields **Prime rental values**	9.8% £22 per sq ft - see Table 3.4
Vacancy rates % = vacant/ (retail +non retail +vacant)	Council survey 2012: 6.6% (16 units out of a total of 241 TC units). Low vacancy rate. There were 26 vacant units in 2006
Cultural and social events	Forfar Dramatic Society- Club One, Farmers' Market Berry Festival, Accordion & Fiddle Festival
Leisure and cultural facilities	Swimming pool, Lochside Leisure Centre (out of centre), halls
Sense of place	Strong sense of place assisted by historic centre. Home of the 'Forfar Bridie'
TC residential population	About 280 residential properties recorded in the Town Centre Health Check 2010- estimate around 600 people.
Employment in the TC	
Street safety	Less shoplifting than the other large Angus towns (Health Checks 2010).

Montrose Town Centre indicators 2012/13 TAYplan role: Larger Town Centre	Sources/ Assessment
Pedestrian footfall	Recorded in Angus Town Centre Health Checks 2010. Montrose and Arbroath TCs busiest among the Angus towns.
Diversity of uses and change	Medium level of variety, including retailing and commericial uses, public services, community uses, leisure, halls, and significant residential. High level of comparison retail floorspace among the Angus TCs, but has fallen since 2006. Good selection of food and drink establishments around the town centre.
Quality of built environment	High quality built environment with distinctive landmarks and vistas. Good heritage explanation for visitors.
Recent and proposed investment	Recent improvements to the town centre street furniture and fittings- Montrose Together.
Strategic accessibility	Located on the eastern edge of the TAYplan area. Good frequency of bus service relative to other Angus towns. Rail connections. Limited Council-run off-street parking- see appendices- also for bus services.
Attitudes and perceptions	Angus Citizens' Panel Survey 2012 on town centres. Findings on Montrose TC indicate satisfactory accessibility and parking, TC good as a place to shop. Satisfactory frontages, but litter an issue. Restaurants/ cafes satisfactory. Street safety satisfactory
Retailer representation and demand	Diverse range of shops, with a good balance of retail and non-retail services. Few specialist independent shops, though. Good multiple representation for size at 24% of retail units (18/76- Council survey 2012). 3 retailer requirements- see Appendix 3
Commercial yields **Prime rental values**	8.20% £25-£30 per sq ft- see Table 3.4
Vacancy rates % = vacant/ (retail +non retail +vacant)	Council survey 2012: 9.8% (20 units out of a total of 205 TC units). Low vacancy rate. There were 23 vacant units in 2006
Cultural and social events	Montrose music festival, Farmers' Market
Leisure and cultural facilities	Museum, William Lamb Studio, halls, Montrose Air Heritage Centre (out of TC), Montrose Basin Visitor Centre (out of TC).
Sense of place	Strong sense of place assisted by high quality of the built environment.
TC residential population	About 470 residential properties recorded in the Town Centre Health Check 2010- estimate around 1000 people.
Employment in the TC	
Street safety	Some shoplifting recorded.

St Andrews Town Centre indicators 2012/13 TAYplan role: Larger Town Centre	Sources/ Assessment
Pedestrian footfall	No recent survey data
Diversity of uses and change	Wide variety, including retailing and commericial uses, public services, community uses, cinema, leisure, halls, cafes, many restaurants, conference facilities, hotels, residential, university, Madras College and visitor facilities. High proportion of comparison retail floorspace. Resilient-no evidence of significant change in mix of uses. Major draw for international visitors.
Quality of built environment	Very high. Medieval university town centre. Conservation area. Well maintained. Current residential expansion proposals sensitive for the above reasons.
Recent and proposed investment	Streetworks completed in Market Street. Council report limited investment through the St Andrews Partnership Tourism BID and Merchants' Association Partnership Plan. More prioritisation of investment would be beneficial too.
Strategic accessibility	Located on the eastern edge of the TAYplan area. Fairly easy road access to Dundee, but otherwise remote in Fife. Express bus services to Edinburgh and Glasgow. No direct rail link (Leuchars). Parking an issue. Car parking and bus services- see appendices.
Attitudes and perceptions	*Fife Town Centre Perceptions Survey 2008 (residents):* St Andrews TC generally rated highly for shopping and a place to visit, plus other attributes. Parking is an issue.
Retailer representation and demand	Multiple retailer representation: 19% (25 out of 130 conv and comp units- Goad 2013). Notable strength among independent specialists, including bookshops and visitor orientated shops and galleries. Multiples include Monsoon, H&M, Tesco, Sainsbury, Superdry and others. Among services, Starbucks and Costa represented. Resilient retailer demand generally. 6 retailer requirements- see Appendix 3
Commercial yields **Prime rental values**	6% £60 per sq ft - see Table 3.4. High relative to other Fife towns.
Vacancy rates % = vacant/ (retail +non retail +vacant)	Goad 2013 (provided by Council): 4.7% (10 units out of a total of 214 TC units). Very low vacancy rate.
Cultural and social events	St Andrews Lammas Market, golf tournaments including British Open. *St Andrews Week* being developed as a food festival, music events, farmers market etc.
Leisure and cultural facilities	Golf and museums (edge of town centre), cinema, library, community hall, sports centres and swimming (edge of centre). Good supporting range of restaurants and cafes.
Sense of place	Outstanding- drawing international visitors to its historic centre and its renown as the 'Home of Golf'. The St Andrews Partnership promotes high standards, aimed at exceeding visitor expectations.
TC residential population	Affluent, plus student population during term times.
Employment in the TC	Estimated at c 700 in the TC- from *12 Fife Town Centres-* Council research paper in 2013
Street safety	

Smaller Town Centres

Aberfeldy Town Centre indicators 2012/13 TAYplan role: Smaller Town Centre	Sources/ Assessment
Pedestrian footfall	No survey information
Diversity of uses and change	Limited variety, including retailing and commericial uses, community uses, halls, cinema, library and residential. Decline in floorspace since 2006, but now has a strong specialist non-food retail offer and a good level of cafes and restaurants.
Quality of built environment	Good quality of built environment with pleasant square. Conservation area. Attractive for visitors, with potential to attract more (Community Council). Good quality retail frontages.
Recent and proposed investment	Refurbishment of 100 seat Birks Cinema- now open.
Strategic accessibility	Located in the north west part of the TAYplan area, on the A827, west of the A It is fairly remote from other towns in the area and about 50 minutes drive to Perth. Moderate through traffic. Car parking (on street) and bus services- see Appendices.
Attitudes and perceptions	No survey. Community Council response to the LDP MIR in 2011, concerns expressed about traffic generation in the town from proposed new housing/ employment land, preserve character of the town centre, more affordable housing, need more tourism.
Retailer representation and demand	Council survey 2013: 18 comp units, 10 conv units, 37 non-retail service units, 7 vacant units- total 72 units. Over 40% of the non-retail service units are cafes, restaurants, take-aways and pubs. Multiple retailer representation 4% (low), but offset by strong independent retailer representation.
Commercial yields **Prime rental values**	No evidence- Ryden £12-£15 per sq ft- Ryden
Vacancy rates % = vacant/ (retail +non retail +vacant)	9.7% (7 units out of 72 recorded in 2013). Low vacancy rate.
Cultural and social events	Aberfeldy show, farmers' market.
Leisure and cultural facilities	Breadalbane Community Campsus nearby (sports hall, swimming pool, studio, lecture hall, community use, conferences), Birks Cinema. Base for exploring the Loch Tay area and surrounds, including walking,biking, fishing.
Sense of place	Strong sense of place with an attractive setting. The town centre offers visitors something to do. Robert Burns association.
TC residential population	
Employment in the TC	
Street safety	

Alyth Town Centre indicators 2012/13 TAYplan role: Smaller Town Centre	Sources/ Assessment
Pedestrian footfall	No survey information
Diversity of uses and change	Limited variety, including retailing and commericial uses, community uses, library and residential. Good range of food shops and a few specialist non-food shops for its small size.
Quality of built environment	Attractive built environment, with historic interest. Building frontages in good condition with pleasant streetscape and town square.
Recent and proposed investment	Past streetscape works in Market Square.
Strategic accessibility	Located in the northern part of the TAYplan area, on the A926, but remote from the A9 and A90 strategic routes to Perth and Dundee. Served by five bus routes. Has 25 on street parking spaces, but no off-street parks.
Attitudes and perceptions	No surveys
Retailer representation and demand	Council survey 2013: 7 comp units, 9 conv units, 22 non-retail service units, 6 vacant units- total 44 units. Some 23% of the non-retail service units are cafes, restaurants, take-aways and pubs. Multiple retailer representation 13%.
Commercial yields **Prime rental values**	No evidence- Ryden No evidence- Ryden
Vacancy rates % = vacant/ (retail +non retail +vacant)	13.6% (6 units out of 44 recorded in 2013). Average vacancy rate.
Cultural and social events	Alyth Show
Leisure and cultural facilities	Library, museum, halls, synagogue
Sense of place	Good sense of place, but with little for visitors to do.
TC residential population	
Employment in the TC	
Street safety	

Brechin Town Centre indicators 2012/13 TAYplan role: Smaller Town Centre	Sources/ Assessment
Pedestrian footfall	Recorded in Angus Town Centre Health Checks 2010. Low counts, especially around The Cross.
Diversity of uses and change	Limited level of variety, including retailing and commericial uses, public services, community uses, halls and residential. Reduction in retail floorspace since 2006. Limited visitor infrastructure- nowhere to linger and little signage.
Quality of built environment	Good heritage interest. Recent Heritage Trust Initiatives and TC Regeneration Fund has improved the town centre environment. Still need to reduce the level of vacant units.
Recent and proposed investment	Occupation of new premises by retailer following THI, plus reconfiguration of the former Woolworths and Swan Hotel.
Strategic accessibility	Located on the exteme north eastern edge of the TAYplan area. Close to the A92. Linkages within the TC less good than the other towns. Car parking and bus services- see appendices.
Attitudes and perceptions	Angus Citizens' Panel Survey 2012 on town centres-Brechin. Satisfactory accessibility and parking. Less satisfied with regularity of buses. Satisfactory TC environment and shops, but not enough range. Satisfactory cafes.
Retailer representation and demand	Limited range of shops by goods category. Evidence of take up of properties following the THI restorations. Recent establishment of Brechin Retailers' Group. Limited multiple representation for size at 9% of retail units (4/43- Council survey 2012). 1 retailer requirement- see Appendix 3
Commercial yields **Prime rental values**	7.3% £20 per sq ft
Vacancy rates % = vacant/ (retail +non retail +vacant)	Council survey 2012: 21.5% (28 units out of a total of 130 TC units). Highest vacancy rate in Angus. There were 27 vacant units in 2006 so little change
Cultural and social events	Angus Show, youth centre, photographic society, British Legion
Leisure and cultural facilities	Caledonian Railway (4 mile historic line), Brechin Castle & Garden Centre (out of TC), halls, library, Leisure Centre (out of centre)
Sense of place	Strong sense of place, but with limited visitor infrastructure (Angus Town Centre Health Checks). Improving environment.
TC residential population	About 190 residential properties recorded in the Town Centre Health Check 2010- estimate around 420 people.
Employment in the TC	
Street safety	Low level of shoplifting recorded, and some vandalism. Street safety fine (Citizens' Panel Survey).

Carnoustie Town Centre indicators 2012/13 TAYplan role: Smaller Town Centre	Sources/ Assessment
Pedestrian footfall	Recorded in Angus Town Centre Health Checks 2010. Low counts.
Diversity of uses and change	Limited level of variety, including retailing and commericial uses, community uses, halls and residential. and residential. Reduction in retail floorspace since 2006. High proportion of non retail services.
Quality of built environment	Rather weak quality of built heritage, but the properties are maintained reasonably. Limited useable open space.
Recent and proposed investment	Some investement reported by the Council. Further regeneration needed to support improvements.
Strategic accessibility	Located on the eastern edge of the TAYplan area. Close to the A930. Close proximity to Dundee. Rail link. Reasonable parking provision- see appendices- also for bus services. Good pedestrian accessibility (TC Health Check)
Attitudes and perceptions	Angus Citizens' Panel Survey 2012 on town centres-Carnoustie. Satisfactory accessibility, parking and buses. Unsatisfactory public toilets. Satisfactory TC environment and shops, but not enough range. Satisfactory cafes.
Retailer representation and demand	Limited range of shops by goods category. High proportion of specialist independent retailers, and high concentration of shops selling food and drink. Limited multiple representation for size at 12% of retail units (3/25- Council survey 2012). No known evidence of retailer requirements
Commercial yields **Prime rental values**	No evidence-Ryden £15 per sq ft- see Table 3.4
Vacancy rates % = vacant/ (retail +non retail +vacant)	Council survey 2012: 8.3% (6 units out of a total of 72 TC units). Low vacancy rate. There were 8 vacant units in 2006 so there has been a slight reduction.
Cultural and social events	Various golf tournaments, in addition to the Open, reading club etc.
Leisure and cultural facilities	Library, halls, leisure centre
Sense of place	Strong identity because of its occasional venue for the British Open Golf . Otherwise limited heritage or visitor infrastructure.
TC residential population	About 90 residential properties recorded in the Town Centre Health Check 2010- estimate around 200 people.
Employment in the TC	
Street safety	Street safety fine (Citizens' Panel Survey).

Coupar Angus Town Centre indicators 2012/13 TAYplan role: Smaller Town Centre	Sources/ Assessment
Pedestrian footfall	No survey information
Diversity of uses and change	Limited variety, including retailing and commericial uses, community uses, halls, library and residential.
Quality of built environment	Limited quality of built environment, but improving after works (see attitude survey). Conservation area. Little to attract visitors or local people at present. Coupar Angus Regeneration Trust (CAR) pursing projects (also a consultee). Smell from the local chicken factory is a major problem
Recent and proposed investment	Recent improvements to the town centre street frontages have greatly benefited the town centre. Need for more investment and reduction in the boarded up properties. Strong regeneration organisations.
Strategic accessibility	Located in the northern part of the TAYplan area, but remote from the A9 and A90 strategic routes. Car parking and bus services- see appendices. Bus services mostly described as good or OK- Consultation. Need for increased local signage to TC and features. Need for better parking and traffic management (but not too bad)- Community Consultation, May 2013
Attitudes and perceptions	Coupar Angus Community Consultation, May 2013 (Community Enterprise)-493 responses. Main concerns are the physical condition of the buildings and shopfronts to create a more vibrant town centre. Positive improvement since 2006 survey.
Retailer representation and demand	Up to date description from CAR: 8 comp units; 4 conv units; 14 service & 3 vacant- total 29 units. Also additonal multiple boarded up retail units used for storage. Limited quality with many shabby frontages. Evidence of demand by existing service users for expansion, plus a low level of external demand. TC would benefit from types of business which attract people into the centre- eg arts & crafts, good restaurant. Multiple retailer representation 8%.
Commercial yields	No evidence- Ryden
Prime rental values	No evidence- Ryden
Vacancy rates % = vacant/ (retail +non retail +vacant)	CAR report- 9 vacant units out of 35 units (25.7%). There include 6 boarded-up units, which are used for storage. Advice from CAR is that they are most unlikely to be re-used as shop units.
Cultural and social events	Arts &Crafts, judo classes, youth club, book club etc.
Leisure and cultural facilities	Library, Town Hall and other community buildings.
Sense of place	Sense of place is mainly in the strength of the local community, rather than in the town centre environment. Further investment would change that. Key issues include more signage needed, more businesses that attract people into the TC, and opportunities for businesses to service developments in the cities. Original source of the Aberdeen Angus breed of cattle.
TC residential population	
Employment in the TC	Perceived lack of local job opportunities- Community Consultation, May 2013. Need to promote local foods.
Street safety	Perceived insufficient level of policing- Community Cousultation, May 2013.

Kirriemuir Town Centre indicators 2012/13 TAYplan role: Smaller Town Centre	Sources/ Assessment
Pedestrian footfall	Recorded in Angus Town Centre Health Checks 2010. Low counts, like at Carnoustie and Brechan
Diversity of uses and change	Limited level of variety, including retailing and commericial uses, community uses, halls and residential. and significant residential. Slight reduction in retail floorspace since 2006. Lack of restaurants, but otherwise good visitor infrastructure.
Quality of built environment	High quality built environment, but with medium quality of buildiing maintenance. Some decline in cleanliness recently. Need to reduce the level of vacant units.
Recent and proposed investment	Little evidence of recent local investment by retailers/ businesses. Benefit from greater building maintenance.
Strategic accessibility	Located on the north eastern edge of the TAYplan area. Close to Forfar supermarkets and close to the A92, giving easy access to Dundee. Well connected by bus services- see appendices- also for car parking.
Attitudes and perceptions	Angus Citizens' Panel Survey 2012 on town centres-Kirriemuir. Satisfactory accessibility and parking. Less satisfied with buses. Satisfactory TC environment and shops, including frontages. Satisfactory cafes, but lack of restaurants.
Retailer representation and demand	High proportion of independent shops with distinctive offer, but limited range of shops by category. Two out of centre supermarket consents, but no development yet. No evidence of demand Limited multiple representation for size at 9% of retail units (3/33- Council survey 2012).
Commercial yields **Prime rental values**	No evidence-Ryden £10 per sq ft- see Table 3.4
Vacancy rates % = vacant/ (retail +non retail +vacant)	Council survey 2012: 19.6% (18 units out of a total of 92 TC units). High vacancy rate. There were 16 vacant units in 2006.
Cultural and social events	Bonfest (rock bands), Handloom exhibition, Fathers' Craft Day, art exhibitions
Leisure and cultural facilities	Town House/Gateway to the Glens Museum, halls, library
Sense of place	Strong sense of place with visitor appeal (Angus Town Centre Health Checks). Needs additional attractions such as restaurants.
TC residential population	About 140 residential properties recorded in the Town Centre Health Check 2010- estimate around 300 people.
Employment in the TC	
Street safety	Low level of shoplifting recorded. Street safety fine (Citizens' Panel Survey).

Monifieth Town Centre indicators 2012/13 TAYplan role: Smaller Town Centre	Sources/ Assessment
Pedestrian footfall	Recorded in Angus Town Centre Health Checks 2010. Low counts in some parts.
Diversity of uses and change	Limited level of variety, including retailing and commericial uses, community uses, halls and significant residential. Increase in retail floorspace since 2006. High proportion of non retail services.
Quality of built environment	Fairly well maintained building frontages, but some are superficial. Need to consider more intervention for improvments. The overall quality of the built environment remains limited.
Recent and proposed investment	There have been improvements in the retail offer and in visitor infrastructure.
Strategic accessibility	Located on the eastern sid of the TAYplan area. Very close proximity to Dundee. Rail link. Train services rated poorly (Citizens Panel). Limited parkng provision- see appendices- also for bus services. Good pedestrian accessibility (TC Health Check)
Attitudes and perceptions	Angus Citizens' Panel Survey 2012 on town centres-Monifieth. Satisfactory accessibility, parking and buses. Unsatisfactory public toilets. Satisfactory TC environment and shops, but not enough range. Satisfactory cafes.
Retailer representation and demand	Limited range of shops by goods category. High proportion of specialist independent retailers. High concentration of shops selling food and drink. Fair multiple representation for size at 15% of retail units (3/20- Council survey 2012). No evidence on retail demand
Commercial yields **Prime rental values**	No evidence-Ryden £15 per sq ft-see Table 3.4
Vacancy rates % = vacant/ (retail +non retail +vacant)	Council survey 2012: 4.1% (2 units out of a total of 49 TC units). Low vacancy rate. There were 8 vacant units in 2006 so there has been a significant reduction.
Cultural and social events	History Society Talks, plays (Monifieth Theatre), tennis coaching/ matches (out of centre)
Leisure and cultural facilities	Library, halls, Monifieth Community Cabin, swimming pool/ sports/ leisure (at High School), theatre
Sense of place	Shortcomings in the quality of the built environment and lack of visitor infrastructure reduce the sense of place.
TC residential population	About 480 residential properties recorded in the Town Centre Health Check 2010- estimate around 1,000 people.
Employment in the TC	
Street safety	Low level of shoplifting. Street safety fine (Citizens' Panel Survey).

Newburgh Town Centre indicators 2012/13 TAYplan role: Smaller Town Centre	Sources/ Assessment
Pedestrian footfall	No recent survey data
Diversity of uses and change	Limited level of variety, including retailing and commericial uses, community uses, halls, and residential, including significant social housing.
Quality of built environment	Fair quality with conservation area, though not especially distinctive. Quite well-maintained appearance. Narrow High Street. Gradual improvement in the appearance of the town centre in recent years, which now serves as a base for commuters to Perth. More investment in the buildings is needed.
Recent and proposed investment	Town Scheme has contributed to works to historic properties. WASPS have invested in artists studios.
Strategic accessibility	Located at south central edge of the TAYplan area, relatively close to Perth, via the A913. Fairly remote from other towns in Fife. Light traffic through the town. Car parking and bus services- see appendices.
Attitudes and perceptions	No recent survey data.
Retailer representation and demand	Multiple retailer/ chain representation: 7% - the Co-op (1 out of conv and comp units - street count August 2013). Additional small regional chains (2)- baker & chemist. There are some specialist craft shops, an art gallery, cat accessories and an eco shop. These add considerable strength to Newburgh's visitor attraction. No evidence on retailer demand
Commercial yields **Prime rental values**	No evidence No evidence- Ryden
Vacancy rates % = vacant/ (retail +non retail +vacant)	6% (2 units out of 33 recorded in August 2013- Council survey). Low vacancy rate.
Cultural and social events	Bookbug sessions, plum and pear markets
Leisure and cultural facilities	Library and heritage centre, halls
Sense of place	The town has slowly recovered from the closure of the former lino factory twenty years ago. It is experiencing residential expansion. The specialist shops offer interest to visitors, rather than the built heritage.
TC residential population	
Employment in the TC	
Street safety	

6 Emerging strategic issues

6.1 Introduction

6.1.1 This section considers the potential strategic planning issues for the next TAYplan MIR which emerge from the review of national policy on town centres alongside the health checks and trend information in the previous sections.

6.1.2 The issues identified in this report are the views of this author, not the TAYplan Strategic Development Planning Authority. As a matter of opinion, the shift in emphasis in policy towards town centres merits the offer of several pointed issues for comment, which adds clarity. TAYplan will consider what the main issues are and what changes to retailing and town centre policy should be made in the MIR. The final SPP (expected June 2014) will also inform the next TAYplan.

6.2 Vision for town centres

6.2.1 Good starting points for reference are the draft SPP and the National Review of Town Centres External Advisory Group Report, June 2013. As mentioned in section 2, this document sets out a 'Town Centres First' principle, where the health of town centres is given central focus in planning for the future, with an emphasis on promoting diversity of activity within them.

6.2.2 The vision is to encourage vibrant town centres which are hubs of social and economic activity. So it is appropriate to present issues which will be largely generic to any strategic plan in Scotland, but the supporting text would relate to the TAYplan area.

6.2.3 The changes will require the new TAYplan to incorporate a practical vision on what planning policies should be aiming to achieve for the town centres in the TAYplan area.

6.2.4 The current TAYplan sets out a definite structure in the form of a hierarchy of 'comparison retail' centres, supported by a summary of the sequential test as it applies to proposed retail and leisure developments. Under the proposed holistic approach to town centres, retailing remains critical, but the policy focus must be revised to encouraging vibrant town centres with a range of activities.

6.3 Issue 1: development of town centre strategies through partnerships

6.3.1 Under this heading, the strategic issue is how best to organise and implement the promotion of vibrant, successful town centres. The proposed approach is engagement between local authorities, agencies, business and the community in formulating development strategies for town centres through partnerships and other agreements. Evidence from the health check summaries supports this approach. The concept is to ensure a feeling of community ownership and participation in generating the future of town centres.

6.3.2 It calls for involvement in masterplans, such as the recent Perth City Masterplan, down to participation in securing improvements to local streets, buildings, parks etc. The approach probably offers the best way of developing a vision and identifying the characteristics of town centres which give them identity and sense of place. Evidence from the health checks points towards some of these characteristics for individual town centres in the TAYplan area.

6.3.3 Furthermore, the approach offers much greater promise of continuity, compared to the alternative approach of leaving the tasks to official bodies. A policy could be introduced which specifically supports the partnership approach to town centre planning and development.

6.4 Issue 2: priority for town centre development over other locations

6.4.1 This issue is whether there should be a strategic planning policy giving support for the promotion of new development in town centres as a priority across a wide range of uses, not just retailing. In addition to retail and leisure uses, it would include uses that generate significant footfall, including public buildings such as libraries, education and healthcare facilities for example (as in the draft SPP). Non-retail service uses and housing should also be included (see also Issue 5).

6.4.2 The implication is that most new development applications in edge of centre, or out of centre locations would have to be justified against a form of sequential test. New criteria for justification would have to be developed for assessing applications involving a wider range of uses in a consistent way. There is no particular reason to change the way retail and leisure proposals are assessed, so the new criteria would apply to other uses.

6.5 Issue 3: Network of town centres

6.5.1 A policy statement is needed on the network of centres in the TAYplan, in order to define the relative scale, role and function of each town centre. The current TAYplan already contains a statement of the hierarchy of centres under Policy 7, Table 2. However, it is orientated strongly towards comparison retailing.

6.5.2 From the data analysis and health checks in this review, there is no reason to amend the hierarchy. There is a need to change its title to *Hierarchy of Town Centres* and move the Commercial Centres to a separate heading to assert the focus on town centres. This move would also enable reference to restrictions on retail parks to protect town centres to be offered for comment. New text is required to provide guidance on the hierarchy relating to other uses described under Issue 2, including the scale and type of development proposals appropriate for different town centres.

6.5.3 In the TAYplan area, it remains appropriate that Dundee City Centre should remain the main focus for comparison retailing, and to a lesser extent, Perth and the larger towns- based on the analysis in section 3 and the health checks.

6.6 Issue 4: prioritisation of investment in town centres

6.6.1 This issue is whether priority should be given to support development and regeneration of the town centres, rather than in investment in other locations. The prioritisation of investment would apply to the bullet point list of desirable actions of improvement in section 5, based on the health check findings in the TAYplan town centres. In other words, it refers to everything from infrastructure to environmental improvements aimed at strengthening ‘sense of place’, not simply funding. A ‘catch-all’ strategic policy could be constructed in a succinct way. The main alternative is a more ad hoc approach.

6.6.2 In the TAYplan area, the ability of town centres to continue to people will be critical, especially more visitors. Therefore investment in environmental improvements, signage and accessibility will be very important.

6.7 Issue 5: Diversity in town centres

6.7.1 Evidence in previous sections of this review, especially Figure 3.1 indicates the extent of diversity in the TAYplan town centres and the variations relating to size and role. In fact Figure 3.1 indicates that there is already considerable diversity of uses in the town centres, so the issue is more about keeping it that way. If retailing plays a reduced role in town centres in the future for market reasons, the proportions of uses in Figure 3.1 will most likely change.

6.7.2 A strategic policy encouraging diversity would support more detailed policy consideration at local development plan level on how the diversity should be encouraged in terms of flexibility of use of town centre units for example (which also relates to Issue 4).

6.7.3 On a related matter, cultural and social events play an important part in promoting town centres and attracting people into them, so this is part of town centre diversity to embrace into policy.

6.8 Issue 6: health checks

6.8.1 The application of regular town centre health checks based on up to date information provides the basis upon which to monitor changes in town centres for planning purposes. A consistent approach to data collection and the method of health checks among the four authorities will offer advantages. So the issues are: what information should be gathered, what indicators are applied and how regularly health checks should be undertaken.

6.8.2 The summary health checks in this review provide a system of indicators to address the performance of the town centres under the contemporary outlook. There is merit in having the requirement for systematic town health checks at regular periods as a matter of strategic policy.

Appendix 1

Vacant and derelict sites in the town centres in Angus and Fife

Town	Sites
Arbroath	Town centre site (approximately 1,000sqm) for two 500sqm units adjacent to Lidl (part of same consent)
Brechin	Backland site/s off McGregor Street provide limited development opportunity
Carnoustie	Two burnt out units at 16 & 18 High Street – approximately 332sqm Redevelopment opportunity adjacent to the town centre – current use as slater's yard
Forfar	Potential redevelopment sites (vacant buildings) include the former bingo hall between the High Street and Queen Street (44pprox. 1.5ha); former hotel and car parking on Castle Street (approximately 2ha) and some small backland sites (vacant) may be available.
Kirriemuir	Gairie works adjacent to the town centre – consent for a supermarket
Monifieth	Redevelopment opportunity – existing shopping centre but multiple ownership
Montrose	No recorded sites

Cupar (no sites in St Andrews)				
		Area (ha)	**Preferred use**	**Status**
1	Bonnygate Gap Site	Less than 0.1	Class 1	Allocated
2	Former Granary (Watts), Coal Road	0.4		Allocated
3	Tesco Development	1.5	Class 1	Site has PP
4	St Columbas site	0.4	Class 7	Planning brief
5	Provost Wynd site	0.2	Class 7	Allocated
6	Moathill Road site	0.2	Class 7	Allocated
7	ATS Depot site	0.2	Mixed use	Development Framework
8	Former cash and carry	0.6		Allocated

Appendix 2

Non-retail service floorspace in the town centres by type

	Cities				
		Council survey 2012		Goad 2012	
	Services	**Dundee City Centre**		**Perth City Centre**	
Type			**%**		**%**
1	Restaurants, cafes, pubs, take aways	21,914	59%	12,756	52%
2	Other services-hair,cleaners, travel agents etc	4,286	12%	5,268	22%
3	Banks, BS, financial services, insurance	4,808	13%	4,487	18%
4	Property, offices and professional services	4,317	12%	1,830	8%
5	Leisure, public services,halls, PO & misc.	1,548	4%	0	0%
	Total	36,873	100%	24,341	100%

	Larger Towns				
		Council survey 2012		Goad 2012	
	Services	**Arbroath TC**		**Cupar TC**	
Type			**%**		**%**
1	Restaurants, cafes, pubs, take aways	2,633	12%	3,020	12%
2	Other services-hair,cleaners, travel agents etc	1,497	7%	1,550	6%
3	Banks, BS, financial services, insurance	1,705	7%	1,460	6%
4	Property, offices and professional services	6,993	31%	4,100	16%
5	Leisure, public services,halls, PO & misc.	9,966	44%	15,130	60%
	Total	22,794	100%	25,260	100%

		Council survey 2012		Council survey 2012	
	Services	**Forfar TC**		**Montrose TC**	
Type			**%**		**%**
1	Restaurants, cafes, pubs, take aways	3,147	17%	2,458	15%
2	Other services-hair,cleaners, travel agents etc	1,108	6%	926	5%
3	Banks, BS, financial services, insurance	1,316	7%	1,534	9%
4	Property, offices and professional services	4,643	24%	2,999	18%
5	Leisure, public services,halls, PO & misc.	8,830	46%	8,934	53%
	Total	19,044	100%	16,852	100%

		Goad 2012			
	Services	**St Andrews TC**		**Total 5 larger towns**	
Type			**%**		
1	Restaurants, cafes, pubs, take aways	7,470	40%	18,729	18%
2	Other services-hair,cleaners, travel agents etc	280	1%	5,361	5%
3	Banks, BS, financial services, insurance	1,960	10%	7,976	8%
4	Property, offices and professional services	1,590	9%	20,325	20%
5	Leisure, public services,halls, PO & misc.	7,400	40%	50,261	49%
	Total	18,700	100%	102,651	100%

	Smaller Towns				
	Services	Council survey 2013 **Aberfeldy TC**		Council survey 2013 **Alyth TC**	
Type			**%**		**%**
1	Restaurants, cafes, pubs, take aways	2,250	41%	750	23%
2	Other services-hair,cleaners, travel agents etc	750	14%	750	23%
3	Banks, BS, financial services, insurance	600	11%	450	14%
4	Property, offices and professional services	1,050	19%	300	9%
5	Leisure, public services,halls, PO & misc.	900	16%	1,050	32%
	Total	5,550	100%	3,300	100%
	Services	Council survey 2013 **Brechin TC**		Council survey 2013 **Carnoustie TC**	
Type			**%**		**%**
1	Restaurants, cafes, pubs, take aways	2,195	22%	976	20%
2	Other services-hair,cleaners, travel agents etc	736	7%	283	6%
3	Banks, BS, financial services, insurance	1,069	11%	450	9%
4	Property, offices and professional services	1,590	16%	933	19%
5	Leisure, public services,halls, PO & misc.	4,499	45%	2,154	45%
	Total	10,088	100%	4,796	100%
	Services	Community survey 2013 **Coupar Angus TC**		Council survey 2012 **Kirriemuir TC**	
Type			**%**		**%**
1	Restaurants, cafes, pubs, take aways	240	19%	527	11%
2	Other services-hair,cleaners, travel agents etc	240	19%	202	4%
3	Banks, BS, financial services, insurance	160	13%	538	12%
4	Property, offices and professional services	320	26%	851	18%
5	Leisure, public services,halls, PO & misc.	280	23%	2,512	54%
	Total	1,240	100%	4,631	100%
	Services	Council survey 2012 **Monifieth TC**		Council survey 2013 **Newburgh TC**	
Type			**%**		**%**
1	Restaurants, cafes, pubs, take aways	1,115	33%	542	45%
2	Other services-hair,cleaners, travel agents etc	264	8%	146	12%
3	Banks, BS, financial services, insurance	118	4%	73	6%
4	Property, offices and professional services	435	13%	146	12%
5	Leisure, public services,halls, PO & misc.	1,415	42%	292	24%
	Total	3,347	100%	1,199	100%
	Services	**Total 8 smaller towns**			
Type					
1	Restaurants, cafes, pubs, take aways	8,595	25%		
2	Other services-hair,cleaners, travel agents etc	3,371	10%		
3	Banks, BS, financial services, insurance	3,458	10%		
4	Property, offices and professional services	5,625	16%		
5	Leisure, public services,halls, PO & misc.	13,102	38%		
	Total	34,152	100%		

Appendix 3

Retailer requirements to locate in the TAYplan town centres

Named Retailer Requirements, September 2013 - (Ryden)

Town	Retailer	Size from (sq.m.)	Size to (sq.m.)	Preferred locations	Type	New or existing	Town trend
East Fife							
Cupar	Yorkshire Trading Co	465	465	High Street	Bargain store	initially listed 2011	4 in 2008, 1 in 2010, 2 in 2012
	Costa	93	139	Office cores, transport hubs and neighbourhood locations	Fast food / take-away / Coffee	initially listed 2009	
	Farmfoods	557	743	Visible arterial road type locations	Foodstore	new	
St Andrews	Phase Eight	65	186	Shopping centres	Clothing	initially listed 2010	7 in 2008, 2 in 2010, 5 in 2012
	Bensons For Beds	279	465	Retail parks, high streets and good secondary locations.	Household goods	initially listed 2012	
	Dominos Pizza Group (take-away)	93	111	Local high streets, parades or edge of town shopping developments	Fast food / take-away / Coffee	new	
	Unnamed Class 1 Retailer	65	139	Prime, in-town	Miscellaneous	initially listed 2012	
	KFC (drive thru/ restaurant)	244	280	Edge of town	Fast food / take-away / Coffee	new	
	Farmfoods	557	743	Visible arterial road type locations	Foodstore	new	
Newburgh	no named requirements						
Dundee City							
Dundee	Cosmo Restaurants	743	1858	Mixed Use Schemes / In Town Schemes/Retail Parks / Leisure Parks / Main Arterial Routes / Shopping Centres	Restaurant	initially listed 2012	27 in 2009, 23 in 2010
	Bargain Book Time	93	279	Shopping centre	Bookshop	initially listed 2011	
	Card Factory	65	209	Prime in town	Card / gifts	new	
	The Whisky Shop	28	56	Secondary, in town		initially listed 2011	
	Phase Eight	65	186	Shopping centres	Clothing	initially listed 2011	
	GNC	60	79	Prime in town	Health food	initially listed 2012	
	Costa	93	139	Office cores, transport hubs and neighbourhood locations	Fast food / take-away / Coffee	initially listed 2009	

Town	Retailer	Size from (sq.m.)	Size to (sq.m.)	Preferred locations	Type	New or existing	Town trend
Dundee continued							
	Frankie & Bennys	344	465	Prime in town	Restaurant	initially listed 2011	
	Chiquito	344	465	Prime in town	Restaurant	initially listed 2011	
	Dominos Pizza Group (take-away)	93	111	Local high streets, parades or edge of town shopping developments	Fast food / take-away / Coffee	new	
	Vets4pets	111	186	Arterial roadside locations. Densely populated suburban area	Animal care	existing	
	Aldi	301	1504	Town centre or edge of centre sites - South Dundee	Foodstore	new	
	Halfords Autocentre	279	557	Prominent locations with nearby retail and motor trade activity	Autocare	new	
	Papa Johns	79	93	Local high streets, retail parades, neighbourhood centres	Restaurant	new	
	McDonalds	336	336	Retail and leisure parks	Fast food / take-away / Coffee	initially listed 2012	
	Farmfoods	557	743	Visible arterial road type locations	Foodstore	new	
Perth & Kinross							
Perth	Bargain Book Time	93	279	Shopping centre	Bookshop	initially listed 2011	17 in 2006
	Topps Tiles Plc	279	743	Car showroom, trade park, showroom consent	DIY	initially listed 2012	
	Costa	93	139	Office cores, transport hubs and neighbourhood locations	Fast food / take-away / Coffee	initially listed 2009	
	Vets4pets	111	186	Arterial roadside locations. Densely populated suburban area	Animal care	on 2006 requirements	
	Pizza Hut delivery	9	93	High street or secondary parade	Fast food / take-away / Coffee	new	
	Aldi	301	1504	Town centre or edge of centre sites - South Perth	Foodstore	new	
	Aldi	301	1504	Town centre or edge of centre sites - North Perth	Foodstore	new	
	Halfords Autocentre	279	557	Prominent locations with nearby retail and motor trade activity	Autocare	new	
	Papa Johns	79	93	Local high streets, retail parades, neighbourhood centres	Restaurant	new	
	Farmfoods	557	743	Visible arterial road type locations	Foodstore	on 2006 requirements	
	Iceland	557	743	High street, suburban area, retail park	Foodstore	initially listed 2012	

Town	Retailer	Size from (sq.m.)	Size to (sq.m.)	Preferred locations	Type	New or existing	Town trend
Aberfeldy	no named requirements						
Coupar Angus	no named requirements						
Angus							
Arbroath	Brighthouse	209	325	High Street or shopping centre	Household	initially listed 2011	4 in 2009
	Bargain Book Time	93	279	Shopping centre	Bookstore	initially listed 2011	
	Yorkshire Trading Co	465	465	High Street	Bargain store	initially listed 2011	
	Aldi	301	1504	Town centre or edge of centre sites	Foodstore	new	
Forfar	Card Factory	74	186	Prime in town	Cards / gifts	initially listed 2011	
	Yorkshire Trading Co	465	465	High Street	Bargain store	initially listed 2011	
Montrose	Bargain Book Time	93	279	Shopping centre	Bookstore	initially listed 2011	
	Card Factory	74	186	Prime in town	Cards / gifts	initially listed 2011	
	Yorkshire Trading Co	465	465	High Street	Bargain store	initially listed 2011	
Brechin	Yorkshire Trading Co	465	465	High Street	Bargain store	initially listed 2011	
Carnoustie	no named requirements						
Kirriemuir	no named requirements						
Monifieth	no named requirements						

Retailer requirements 2013- summary totals by town (Ryden)				
Town Centre	**Number of retail requirements**	**Size of requirements from sq.m.**	**Size of requirements to sq.m.**	**Trend**
East Fife				
Cupar	3	1115	1347	down
St Andrews	6	1303	1924	down
Newburgh	-	-	-	-
Dundee City				
Dundee	16	3591	7266	down
Perth & Kinross				
Perth	11	2659	6584	down
Aberfeldy	-	-	-	-
Alyth	-	-	-	-
Coupar Angus	-	-	-	-
Angus				
Arbroath	4	1067	2572	-
Forfar	2	539	650	-
Montrose	3	632	929	-
Brechin	1	465	465	-
Carnoustie	-	-	-	-
Kirriemuir	-	-	-	-
Monifieth	-	-	-	-

Appendix 4

Car parking in the TAYplan town centres

TAYplan town centres- car parking

Town Centre	Off-street		On-street
	No. of car parks	Capacity-spaces	No. of spaces
Arbroath	12	563	123
Brechin	6	173	39
Carnoustie	3	116	81
Forfar	7	461	73
Kirriemuir	3	153	44
Montrose	4	182	171
Monifieth	0		32
Dundee City Centre	29	5,000	530
Perth City Centre	28	2,775	1179
Aberfeldy	0		77
Alyth	0		25
Coupar Angus	0		30
Cupar	various	476	0
St Andrews	various	789	498
Newburgh	1	5	0

Note

Data provided by the local authorities, August 2013

Appendix 5

Bus services

TAYplan towns- bus services

Town	Bus Service	Total services	Frequncy (weekdays)
Arbroath	43, 39, X7	3	At least 2 every hr
	27, 30, 35, 44, 49, 73, 73A	7	At least 1 every hr
	46, 49, 50, 140	4	At least 1 every 2hr
	27A, 27B, 27C, 30A, 31, 32, 33, 36, 37, 37A, Town Services 42-45, 46, 49, 50	16	Less frequent
Brechin	30, 34,	2	At least 1 every hr
	21, 21A, 24, 29, 29A, 140, 141,	7	At least 1 every 2hr
	21B, 30B, 31, 118, 150 Town Service 34	5	Less frequent
Carnoustie	73	1	At least 2 every hr
	73A,	1	At least 1 every hr
	73C, 73E, 81,	3	Less frequent
Forfar	20	1	At least 2 every hr
	23, 23A, 23B, 23C, 24, 27	6	At least 1 every hr
	21, 21A, 125	3	At least 1 every 2hr
	21B, 20C, 21B, 25, 26, 27A, 27C, 81, 114, 117, Town Services 23,23b,24,26,114,117	13	Less frequent
Kirriemuir	20	1	At least 1 every hr
	128, 129	2	At least 1 every 2hr
	22, 22D, 25, 27A, 120, 121, 124, 130	8	Less frequent
Monifieth	73	1	At least 2 every hr
	73A, 75	2	At least 1 every hr
	73B, 73C, 73E, 78, 79A, 79C, 81,	7	Less frequent
Montrose	47, 48, X7	3	At least 2 every hr
	8, 9, 30, 52	4	At least 1 every hr
	107, 113	2	At least 1 every 2hr
	8A, 9A, 30A, 30B, 32, 47, 47B, 52, 115, 116 Town Services 47,47a,47b,48,52	10	Less frequent
Cupar	23, 24, X24, 41,41B, 42, X42, 59, 64, 68,68A, 68B, 94, 94A	14	mostly every 1- 2 hours
St Andrews	23, 24,X27, X58, X60, X59,64, 92, 94, 94A, 95, 99, 99D	13	mostly every 1- 2 hours
Newburgh	35A, 36, 36A, 94	3	every 1- 2 hours
Perth	14,15A,16A, 16B,17, 23, 27, 34A, 34B, 35A,36A 53B, 56A, 56B, 57,333, 823,	17	mostly every 1- 2 hours
Coupar Angus	53A, 57, 59	3	mostly every 1- 2 hours or less
Alyth	122, 128, 129, 57, 59	5	mostly every 1- 2 hours or less
Aberfeldy	23D,83, 91, 823, 826, 892, 893, 895, 896	9	mostly every 1- 2 hours or less
Dundee	202, 1A,1B, 1S,10S, 1C, 5, 14,14A,15, 7,16, 17, 18, 19, 20,20C,22, 21,22,23, 26, 26C, 28,29, 36,39,X39, 32,33,33A, 36,36C, 39, 137, 137A,42, X42,X54, 57,59,43, 73,75,77,78, 79,96,99, 138,139, 204,208,342,M9	55	hourly

Data provided by the local authorities, August 2013

Appendix 6

Train services

TAYplan study area- Train Services		
	Train station	Service
Regional Centre		
Dundee City Centre	yes	Scotrail
Sub-regional centre		
Perth City Centre	yes	Scotrail
Larger town centres		
Arbroath	yes	Scotrail
Cupar	yes	Scotrail
Forfar	no	
Montrose	yes	Scotrail
St Andrews	no	
	(Leuchars)	Scotrail
Smaller town centres		
Aberfeldy	no	
Alyth	no	
Brechin	no	
Carnoustie	yes	Scotrail
Coupar Angus	no	
Kirriemuir	no	
Monifieth	yes	Scotrail
Newburgh	no	