

Town Centre Health Check Report



Falkirk Council
Development Services

December 2021



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1. Introduction

Context

The importance of town centres is widely acknowledged. They are at the heart of communities, providing a sustainable focus for shopping, business, leisure, services and community life, and shaping their sense of place. Much has changed since our last health check report in 2019, with a global pandemic making a profound impact on town centres which were already facing significant challenges from economic recession, technological and social change and structural changes in retail. Increased home working due to Covid has accelerated some of the changes already taking place such as falling footfall, growth in online shopping and business closures.

The town centre first principle is embedded in Scottish Government policy. The vision is to encourage a mix of uses in town centres to support their vibrancy, vitality, and viability throughout the day and into the evening, with a renewed emphasis on promoting residential uses in town centres. In July 2020 the Scottish Government established a group to review the scope of the Town Centre Action Plan. The Review placed particular emphasis on the role of town centres in recovering from the impact of Covid and meeting Scotland's climate change agenda. This has been taken forward within the draft National Planning Framework (NPF4), published in November 2021, which has set out detailed policies on centres, the role of retail, town centre first, and town centre living. The role of town centres in supporting the concept of 20 minute neighbourhoods, community wealth building, and place based strategies generally, is highlighted.

Falkirk Council has an ongoing commitment to supporting its town centres which has continued throughout the pandemic. This is demonstrated by general support for business in responding and adapting to the challenges of the pandemic, and a range of short and long term regeneration initiatives which are being progressed, including projects within the Council's Growth Deal, which are described in outline within this report.

Purpose

In order to properly assess the state of town centres, prescribe actions to address issues and monitor progress, it is important to have a sound information base of indicators of vitality and viability. Scottish Planning Policy (SPP) states that 'local authorities, working with community planning partners, business and community groups as appropriate, should prepare a town centre health check'. An annex to SPP sets out a range of indicators which may be relevant. The advice is that health checks should be regularly updated, to monitor town centre performance, preferably every two years.

The first Town Centre Health Check was published in 2016. It brought together a range of data on town centre vitality and viability in Falkirk Town Centre, and the four district centres of Bo'ness, Denny, Grangemouth and Stenhousemuir, arranged broadly under the headings suggested in the SPP annex. This was updated by a report in 2019. This third report now gives an opportunity to provide an update in unprecedented times and in particular to provide an early indication of the impact of the pandemic on our centres, and how they are responding to these impacts. The 2021 report will highlight changes and issues in the intervening two years since the previous health check.

Structure

The structure of the report is based on a list of topics, adapted from Annex A of the SPP, as shown below:

Figure 1: Town Centre Health Check Report Structure

Activities and Uses

Overview

Retail and Retail Services

Business and Office

Leisure, Tourism and Hospitality

Culture, Social and Community

Residential

Accessibility

General Accessibility/Modal Split

Walking, Wheeling and Cycling

Public Transport

Car Access and Parking

Signage

Environment

Overall Structure

Public Realm, Civic and Greenspace

Historic Environment

Vacant and Derelict Land

Cleanliness

Air Quality

Community

Engagement

Attitudes and Perception

Commercial Viability

Vacancies

Footfall

Retail Status and Performance

Prime Rents and Yields

Regeneration Activity

Business Improvement District

Partnership and Action Planning

Covid Response and Recovery

Current and Future Projects

Development Opportunities

2. Overview of Falkirk's Town Centres

The Falkirk Local Development Plan 2 (FLDP2) defines a network of centres, categorised under four types: principal centres, district centres, local centres and commercial centres. This report covers only the principal centre of Falkirk and the four district centres of Bo'ness, Denny, Grangemouth and Stenhousemuir.

The roles of the different types of centres are defined in LDP2 as follows:
Principal Centre - Major visitor destination serving area-wide catchment for comparison and convenience shopping. Provides an extensive range of shops, services, leisure/cultural activities and community facilities.

District Centre - Centres serving the larger towns in terms of main food shopping, limited comparison shopping and a wide range of local services.

Key characteristics of each of the centres are listed below.

Falkirk is an historic burgh town centre of sub-regional scale with a traditional high street at its core, off which two indoor shopping malls - the Howgate and Callendar Square - were developed in the 1980s/90s.

Bo'ness is a smaller historic burgh centre adjacent to the River Forth and the town's redundant dock and harbour. It has been the focus of heritage based regeneration over recent years.

Denny is a small centre combining a traditional shopping street on the east side of Stirling Street and, on the west side, a new development of shop units, library and public square that has replaced the former 1960s precinct.

Grangemouth is the second largest centre in terms of floorspace. It comprises a 1970s precinct style shopping centre, alongside a core of older civic buildings on Bo'ness Road, and a large Asda superstore immediately to the north.

Stenhousemuir is a small 1960s precinct style centre which underwent an extensive redevelopment in 2010 to create a new Asda supermarket, retail units, library and health centre.



Figure 2: Main Characteristics of Centres

Centre Name	Population (2019 estimate)	Physical Extent (hectares)	GF Floorspace (gross sq.m.)	No. of Units
Falkirk (Definition of Falkirk Town Centre now excludes Central Retail Park)	37,886	44	120,460	473
Bo'ness	14,361	22	12,415	99
Denny	12,491	9	5,652	56
Grangemouth	16,204	12	18,022	102
Stenhousemuir	26,383	7	10,609	50

3. Falkirk Overview

The core of Falkirk Town Centre comprises a pedestrianised High Street, with the Howgate Shopping Centre at its heart and the Callendar Square Shopping Centre at the east end. The core stretches north from the High Street to Newmarket Street, Princes Street and Garrison Place and is connected by linking streets including Vicar Street and Lint Riggs, and to the south where it is bordered by St Crispin's Place with the key linking retail street being Cow Wynd.

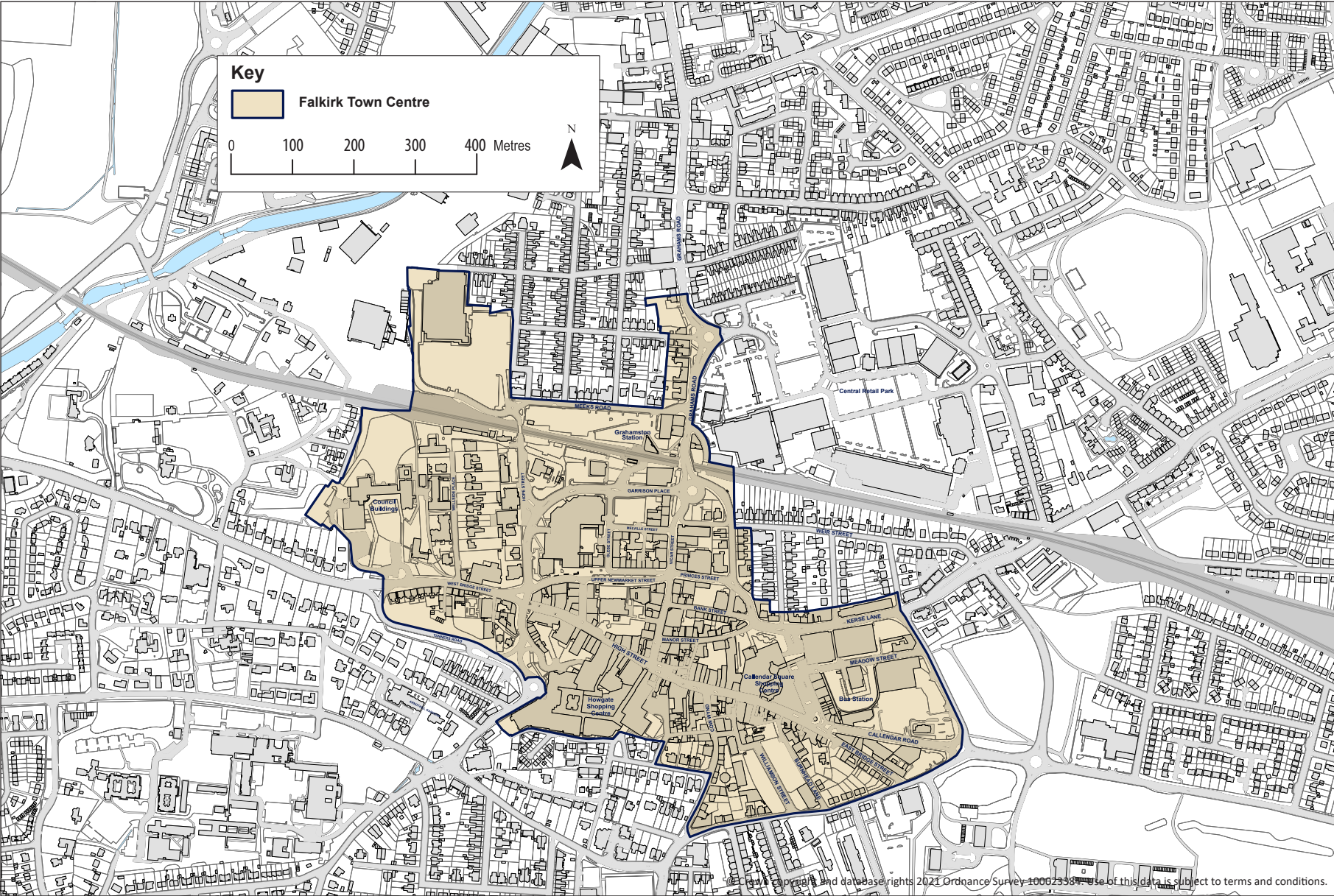
Central Retail Park lies immediately to the north east. It was previously included in the Town Centre boundary, but since changes to the Local Development Plan in 2020, it is now defined as a separate commercial centre. Nonetheless, there is a strong functional relationship between the two, with the retail park providing parking that serves the Town Centre more generally, and joint trips being common.

Representation of national retailers has declined over recent years, with the closure of Marks and Spencer in the High Street the most notable example. However, there remains a thriving independent sector, and a good food and drink offer. Service uses have grown over the years, whilst comparison retail floorspace has decreased and convenience remained fairly stable.

In 2019, CACI reported that based on comparison goods market potential, Falkirk ranked 19th out all Scottish retail centres. This places Falkirk in the top 5% of Scottish Centres. In context, however, CACI reports that Falkirk has fallen from 7th in 2010 in the town centre rankings. In terms of the retail mix in Falkirk CACI notes that Falkirk is dominated by mass market and value retail which in combination account for 96% of the total offer in the town centre.



Map 1: Falkirk Town Centre Boundary (LDP2)



3. Falkirk Activities and Uses

The primary source of information on activities and uses is the Council's floorspace survey, with the most recent survey in 2021. This provides comprehensive information mainly in relation to the use of ground floor premises. Information on the use of upper floors remains more limited, although some monitoring is being carried out of the utilisation of the space, particularly conversion to residential use. Figures 3 and 4 show the aggregated results of the survey for Falkirk Town Centre over the years 1996 to 2021. The change in the definition of Falkirk Town Centre in 2020 to exclude Central Retail Park means that care needs to be exercised in comparing figures from the pre-2020 period with the 2021 figures. For ease of comparison between 2019 and 2021, figures both including and excluding the retail park are given.

The floorspace survey shows that Falkirk Town Centre supports a diverse range of activities and uses, commensurate with its role as the principal centre in the Council area. Historically, its strengths have been as a retail and administrative centre serving the area, and whilst these functions remain important, retail services, leisure and community uses are becoming more significant, in common with national trends.

The impact of the COVID19 pandemic since March 2020 has undoubtedly had an impact on the town centre, and on consumer behaviour. Local business has shown a remarkable degree of resilience, but footfall figures remain well short of pre-Covid levels, and consumer confidence in returning to the Town Centre is likely to be impacted for some time.



Retail and Retail Services

Whilst retailing remains an important function, Figures 3 & 4 shows that its relative importance is reducing. Looking at the Town Centre only (excluding Central Retail Park), retailing in 2021 comprises about 46% of total floorspace, down from 50% in 2019. The reduction in retail floorspace and units is accounted for by the continued decline in the comparison sector, a trend that has been evident for some years as structural changes in the retail sector have seen sub-regional centres such as Falkirk lose out to the bigger regional centres.

Convenience shopping remains an important component of the Town Centre's role and vitality, and the amount of convenience floorspace and the number of units has remained stable between 2019 and 2021, notwithstanding the closure of Iceland in Callendar Square. Asda and Morrisons are the largest stores within the Town Centre boundary, with Tesco and M&S Food represented in Central Retail Park, and Lidl currently being rebuilt and enlarged, also in an edge of centre location at the east end.

The Howgate Centre and Callendar Square shopping centres continue to operate within challenging retail market conditions. The number of vacant units in Callendar Square has once again increased, with many of the smaller units now ceasing to operate or relocating elsewhere in the town centre. The Howgate Centre has also lost a number of national retailers, and has had to find innovative solutions to keep units occupied by encouraging community uses and pop-up stores.

Whilst there remains a significant representation of national retailers within the Town Centre, the High Street has lost some key names since the last Health Check including Debenhams, Dorothy Perkins, Wallis and Iceland. At the same time Central Retail Park, outwith the Falkirk Town Centre boundary, with its larger, more flexible units has enabled the retention and even attraction of some national retailers. It is almost full and nearly all vacant units have, to date, been taken up relatively quickly.

3. Falkirk

Activities and Uses

A key characteristic of the town centre is its independent sector, and the continuing variety of distinctive local retailers in both the retail and service sector is an important asset in the changing retail environment. A number of initiatives supported by Falkirk BID have helped to bolster this sector, including free delivery service during the COVID19 pandemic, a Falkirk Town Centre gift card scheme, as well as bespoke business support and promotion for all businesses within the BID area.

Retail services are an increasingly important component of the Town Centre. For example, the number of hairdressers/barbers and beauty salons has increased from 46 units from in 2019 to 71 units in 2021.

Figure 3: Falkirk Town Centre Floorspace Survey 1996-2021 (Including Central Retail Park)

Year	Convenience Floorspace	Comparison Floorspace	Service Floorspace	Vacant Floorspace	Total Floorspace	Conv Units	Comp Units	Service Units	Vacant Units	Total Units
1996	21,200 m ²	74,290 m ²				38	257	171	64	530
2004	19,626 m ²	82,839 m ²	28,394 m ²	7,771 m ²	138,630 m ²	26	252	197	50	525
2009	27,620 m ²	83,999 m ²	33,621 m ²	15,945 m ²	161,185 m ²	25	231	180	55	491
2014	22,930 m ²	75,599 m ²	37,636 m ²	25,894 m ²	162,059 m ²	19	172	203	106	500
2019	24,641 m ²	69,936 m ²	43,382 m ²	26,999 m ²	165,449 m ²	20	162	231	80	502
2021	25,468 m ²	64,866 m ²	44,084 m ²	32,690 m ²	164,057 m ²	24	145	242	89	500

Figure 4: Falkirk Town Centre Floorspace Survey (Excluding Central Retail Park) 2019-2021

Year	Convenience Floorspace	Comparison Floorspace	Service Floorspace	Vacant Floorspace	Total Floorspace	Conv Units	Comp Units	Service Units	Vacant Units	Total Units
2019	16,960 m ²	43,535 m ²	35,614 m ²	25,250 m ²	121,851 m ²	20	142	227	81	474
2021	16,900 m ²	38,626 m ²	33,295 m ²	31,639 m ²	120,460 m ²	22	127	235	88	473

3. Falkirk

Activities and Uses

Business and Office

Falkirk has a mix of office property within the Town Centre rather than a concentration in a central business district. Around 9% of units are occupied by business and financial services, including banks, building societies, financial advisers, employment services, solicitors and property services. However, upper storeys accommodate a number of businesses throughout the Town Centre, and these are not generally recorded in the floorspace survey.

In general, office property in the Town Centre is dated and of low quality, and there is a dearth of modern floorspace, but where modern serviced provision has been provided, for example in the Hub in Vicar Street, this has proved popular. A further recent development, which has not been captured in the floorspace survey, is the conversion of the large former BHS unit in Callendar Square for the Department of Work and Pensions (DWP).

The largest office complex is the Council's HQ building at West Bridge Street. The Council is currently evaluating options for its replacement.

Leisure and Tourism

The leisure function of the Town Centre continues to be important. The floorspace survey records some 15% of units in use for leisure services, including pubs, restaurants, takeaways, cafes, amusement arcades, night clubs, betting shops and fitness clubs. The hospitality sector has, of course, been particularly challenged during the pandemic, but appears to have emerged in a reasonable state with the number of restaurants, cafes and fast food outlets only reducing marginally (53 units in 2019 to 50 units in 2021), with this sector now accounting for around 11% of all units within the Town Centre.

Although Falkirk has developed significantly as a tourist destination over the last decade due to the impact of the Falkirk Wheel and the Helix/ Kelpies, attracting visitors to the Town Centre remains a challenge. The Town Centre has seen a reduction in hotel accommodation, and now only offers the Orchard and Graeme Hotels, with the Antonine Hotel no longer in use and the Cladhan site subject to an application for redevelopment for residential use. However, serviced apartment accommodation is available on Newmarket Street, and there is a growing number of AirBnB premises within the Town Centre. There are chain hotels at the edge of the Town Centre including the Premier Inn at Rosebank, and the Best Western Park Hotel.



3. Falkirk

Activities and Uses

The Town Centre benefits from the proximity of Callendar House and Park as a major tourist attraction, although links between the two could be improved. Meanwhile to the west of the Town Centre, the proposed regeneration and reopening of the Rosebank Distillery, which is currently under construction, will have positive benefits, providing a striking new gateway when approaching from the west, and a further visitor attraction which is easily accessible from the Town Centre.

Falkirk Council/BID continue to engage with visiting tourists and the provision of left luggage lockers in Melville Street aims to facilitate the requirements of travellers and tourists enjoying a short stopover in the Town Centre.

Cultural, Social and Community

Falkirk Town Hall provides a multi-purpose arts, cinema and conference centre at the west end of the Town Centre. This 1960s facility is not currently considered fit for purpose, and its future is under review as part of the Council HQ project. The future integration of any replaced or refurbished arts centre within the Town Centre is seen as being important. Falkirk Library on Hope Street also provides a valuable community resource, which currently houses the Council's Central Advice and Support Hub. Its future is also being considered as part of the Council HQ/Arts Centre replacement project.

A strong sense of community is reinforced in Falkirk by a number of places of worship in the Town Centre including Falkirk Trinity Church, St Francis Xavier RC Church, the Falkirk Islamic Centre and Falkirk Muslim Educational and Cultural Centre.

There is an increase in community uses within Town Centre retail units. Forth Environment Link have a presence on Falkirk High Street through the Active Travel Hub and Revive (reuse workshops and advice), and have benefited from the Falkirk Townscape Heritage Initiative (THI) through new shopfronts and public realm. Both Callendar Square and the Howgate are seeing units utilised by community projects and enterprises including the Falkirk Sewing Studio, From Me to You outreach services and the Seagull Trust.



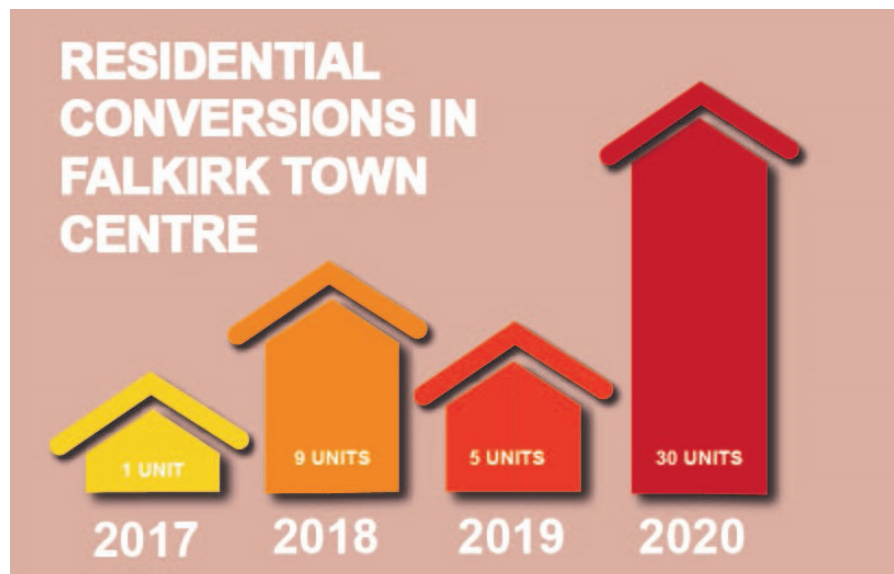
3. Falkirk

Activities and Uses

Residential

The resident population of Falkirk Town Centre was estimated to be approximately 615 in 2016 which is fairly small for a centre of its size. However, with the greater emphasis being placed on residential use as a means of regenerating town centres and repurposing vacant property and sites, Falkirk is seeing an encouraging upturn in residential development activity, with upper storeys being converted back to flats, a trend which was initially assisted by the Townscape Heritage Initiative. Between 2017 and 2021, there were 13 applications approved for change of use to residential dwellings totalling 45 units. This is in addition to the recently completed social housing in Williamson Street (36 units). LDP2 seeks to encourage town centre residential development through a policy waiving certain developer contributions on smaller residential proposals within the town centre boundary.

Figure 5: Residential Conversions in Falkirk Town Centre 2017-2020



3. Falkirk

Activities and Uses

Summary

- Comparison floorspace and number of units continues to reduce;
- Convenience shopping is stable and remains an important component of the town centre's role and vitality;
- Representation of national retailers on the High Street continues to decline, but there is a wide range of independent retailers, particularly within non-primary retail areas;
- The Howgate and Callendar Square shopping centres face major challenges, given lower retail demand and the configuration of the centres;
- Service uses continue to be a vital part of the Town Centre's function occupying around 28% of floorspace and nearly 50% of units;
- Office space is generally of poor quality, although the Hub and the recent lease to DWP in Callendar Square illustrates potential for growth;
- Leisure and hospitality appears to have weathered the pandemic, although traditional hotel accommodation within the Town centre is in decline. The leisure and tourism potential of the Town Centre remains good if enhanced connectivity between the Town Centre and key attractions (Callendar Park, Helix, Falkirk Wheel) can be achieved;
- The Town Centre has a relatively small resident population, but there has been a rise in conversion of vacant and underused space to residential use, as well as new residential development within the centre.



3. Falkirk Accessibility

The accessibility of town centres is a key factor in their success. Accessibility must consider all modes of transport and should reflect the sustainable travel hierarchy, priority being given to walking, wheeling, cycling and public transport. As focal points in the sustainable transport network, town centres have a key role in supporting lower carbon and more inclusive transport options and facilitating the development of 20 minute neighbourhoods.

The method of travel to the Town Centre was surveyed as part of a Shopper Survey carried out in 2019. Compared to the 2018 Falkirk Delivers Survey, this indicates a reduction in car travel and an increase in bus travel and walking, although the private car remains the dominant mode.

Figure 6: Method of Travel to Town Centre (%)

Mode of Transport	
Car	50.7%
Taxi	2.7%
Bus	32.7%
Train	0.7%
Walking	13.3%
Cycling	0.0%

Source: Shopper Survey, June 2019, NEMS/Lichfield

In a survey conducted by the Falkirk Herald in 2018, out of 2,639 responses received, 73.4% of respondents indicated that they considered it easy to get in and out of the town centre by car or public transport. In the same survey an impressive 94.7% of people thought the Town Centre was easy to navigate around on foot.

Walking, Wheeling and Cycling

The pedestrianised core of Falkirk Town Centre provides a generally good environment for pedestrians, and the recent public realm works to Kirk Wynd/Vicar Street as part of the Townscape Heritage Initiative have improved the main axis north from the High Street. However, this core is encircled by busy roads which present barriers to movement. Examples include access between Grahamston Station and the Town Centre which involves crossing Garrison Place, and the link between the Town Centre and the Retail Park which involves crossing Grahams Road. Callendar Park is severed from the Town Centre by Arnot Street/Callendar Road.

The busy arterial and radial roads around the Town Centre act as a disincentive to cycle use, and dedicated cycle routes into the Town Centre from the rest of the town are limited. The Bleachfield path to the rear of the Municipal Buildings provides a potentially important off-road route, which connects to the canal towpath and both the west and east of the town. It also connects to the route northwards along the Mungal Burn to Newcarron Village and Larbert. The enhancement of the Bleachfield route, which would strengthen the connection between the Town Centre and Falkirk's canal network, is being investigated as part of wider improvements to the Falkirk canal corridor. Potential for an off-road cycle/pedestrian corridor connecting the Town Centre eastwards to the new Forth Valley College campus, the Falkirk Gateway and the Helix has been highlighted in Falkirk LDP2, and this route is part of active travel improvements included in the Falkirk/Grangemouth Investment Zone Growth Deal. Both these schemes would not only improve active travel for residents into the Town Centre, but provide good connections to some of the area's key visitor attractions.

Falkirk's Active Travel Hub on the High Street was launched in 2018 and aims to encourage and support both the local community and visitors to make more of their everyday journeys by walking, cycling and other sustainable modes of transport. The Hub provides access to bikes and e-bikes through a bike lending library and shares knowledge on local active travel routes as well as running workshops on topics such as bike maintenance.

3. Falkirk

Accessibility

Public Transport

Falkirk Town Centre is the hub of the bus network in the area and a relatively high proportion of trips to the Town Centre are made by this mode. Services connect to most parts of the Council area. The bus station at Callendar Road closed in 2018 with Upper Newmarket Street becoming the new hub for buses, with proposed improvements to the public realm here set to enhance this new function. There are limited bus lanes on radial routes into the Town Centre which means buses are affected by congestion at peak times. However, as part of a successful £0.5m bid by the Forth Valley Bus Alliance to the Bus Partnership Fund, improvements will be made to key journey corridors feeding into the Town Centre - the A803 Glasgow Road from the Falkirk Wheel Park and Ride, and the B902 Grahams Road.

Falkirk Grahamston Railway Station is located on the northern edge of the Town Centre, with services to Dunblane, Edinburgh and Glasgow. These services have benefited from major electrification investment over recent years. However, there is considerable scope for improvement of the station to create a more attractive arrival point with better facilities, access, information and integration with other sustainable transport modes. These opportunities were highlighted in the 2019 Falkirk Stations Travel Plan and are due to be taken forward through the Falkirk Central project, a key proposal within the Falkirk/Grangemouth Investment Zone Growth Deal. This aims to create a rebranded sustainable transport hub at Grahamston offering a bus, rail, pedestrian and cycling interchange, and an improved arrival/orientation experience for those coming to the Town Centre by train.



3. Falkirk Accessibility

Car Access and Parking

Access by car to the Town Centre is via several radial routes which are affected by varying degrees of congestion at peak times.

Car parking provision in the Town Centre is generous and relatively cheap, a legacy of the doubling of parking capacity over the period from 1986 to 2001 as a result of a number of new developments. The 2015 parking survey indicated that there were 6467 spaces in total, with some 63% provided in private car parks such as those at Central Retail Park, the two shopping centres and the large supermarkets; 19% in Falkirk Council car parks; and the remainder comprising various forms of on street parking. The fact that such a high proportion of parking is outwith the Council's control, and much of this is free, makes it difficult for the Council to influence travel and parking behaviour in the Town Centre.

Parking demand was fairly static over the period 1996 to 2006 but over the last 10 years, peak demand on Saturdays has fallen off by some 10%, probably reflecting recession, changing shopping patterns and the decline in the town's retail offer. The latest 2019 parking survey indicated peak occupancy on Saturday as 68%, meaning there is spare capacity of nearly one third.

The Council's parking management and pricing policies continue to evolve to reflect changing demands and technology. The 'Free after 3' initiative continues, while a new lower short term parking tariff was introduced in 2020 to support more 'click and collect' activity. The introduction of the RingGo mobile payment platform has allowed more flexibility for customers.

The Council commissioned WSP to produce a Town Centre Parking Strategy in 2020 which assessed a variety of potential interventions and came up with a package of mainly small scale measures to enhance the effectiveness of provision, including improvements to infrastructure, promotion and business engagement, ticketing flexibility, minor reorganisation, and rule changes.

There are currently three electric vehicle charging locations in the Town Centre, clustered together at Meeks Road, Melville Street and Garrison Place car parks, and offering a total of 17 charging bays.

Given the nominal oversupply of parking, and a number of possible redevelopment opportunities emerging in the Town Centre, there will be choices to be made over the future of parking, and the desirable type, level and distribution of provision. Promoting more sustainable travel will be a key consideration, as will ensuring that the parking needs of groups such as residents, short term shoppers, and those with mobility issues are catered for.



3. Falkirk

Accessibility

Signage

The Falkirk Herald survey in 2018 found that 66.9% of those surveyed considered that the town centre is well signposted. There is good pedestrian signage in the Town Centre, with attractive orientation boards at key locations. Signage for vehicle users was considered as part of the WSP Parking Strategy in 2020 and included some measures to assist wayfinding to car parking.

Summary

- The 2019 Shopper Survey indicated that around half of people accessing the Town Centre do so by private car, with a third using bus, and an eighth walking. There is a need to increase sustainable modes of travel as part of efforts to combat climate change;
- Walking is a mixed experience for those accessing the Town Centre on foot, the pedestrianised centre contrasting with the barriers presented by the busy peripheral roads;
- Few people access the Town Centre by bike, probably reflecting the relatively hostile environment for cycling on the main roads coming into the centre, and the lack of dedicated cycle paths. However, the Active Travel Hub is working to promote more cycle use and there are opportunities for better facilities and routes;
- Access to the Town Centre by public transport is good, reflected in a high level of access by bus in particular. However, Grahamston railway station offers a poor arrival experience for visitors, and integration of transport modes could be much better;
- Access by car is generally good, subject to congestion at peak times. Parking is generous and relatively cheap, particularly given the large, free surface car parks provided by the Retail Park and the supermarkets. While parking supply has increased over the years, parking demand has decreased between 2006 and 2015 reflecting economic conditions, meaning there is excess capacity;
- Parking management and pricing in the Council's car parks continues to evolve in response to need, while longer term questions as to the appropriate level and distribution of parking will have to be addressed as the Town Centre adapts to its changing role;
- A range of active travel and public transport opportunities exist which offer the potential to improve the accessibility of the Town Centre, benefiting its vitality and viability and contributing to climate change objectives.

3. Falkirk Environment

Overall Structure

Falkirk Town Centre comprises a traditional pedestrianised High Street, with two indoor shopping centres: Callendar Square at its east end and the Howgate centrally located. In visual terms the focus of the High Street is the Steeple, a notable landmark which dates back to 1814. The secondary shopping areas radiate out from the High Street to the north to link with Central Retail Park and to the south along Cow Wynd.

Public Realm and Greenspace

Open space within the town centre is limited as there are no public parks within its boundary. The most notable areas of civic open space within the town centre are provided by the pedestrianised High Street, and the grounds of Falkirk Trinity Church. Dollar Park, Callendar Park and Bellsmeadow Park all provide large, attractive areas of parkland at the edge of the Town Centre although linkages and signage to these parks could be improved.



3. Falkirk

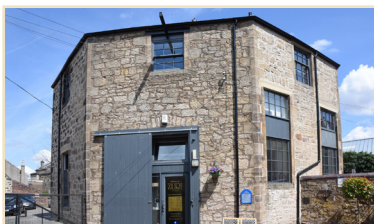
Environment

Historic Environment

Conservation Area

A significant part of the Town Centre has conservation area status. It was first designated a conservation area in 1971 in recognition of its significant built heritage and distinctive townscape character. The majority of the High Street is included within the conservation area, the only exceptions being the 1960s frontages at its western end and Callendar Square shopping centre at the east end.

Whilst modern retail development has had some impact on the historic street pattern, the conservation area designation serves to enhance and preserve the special character and appearance of the historic architecture and surviving elements of the historic street pattern.

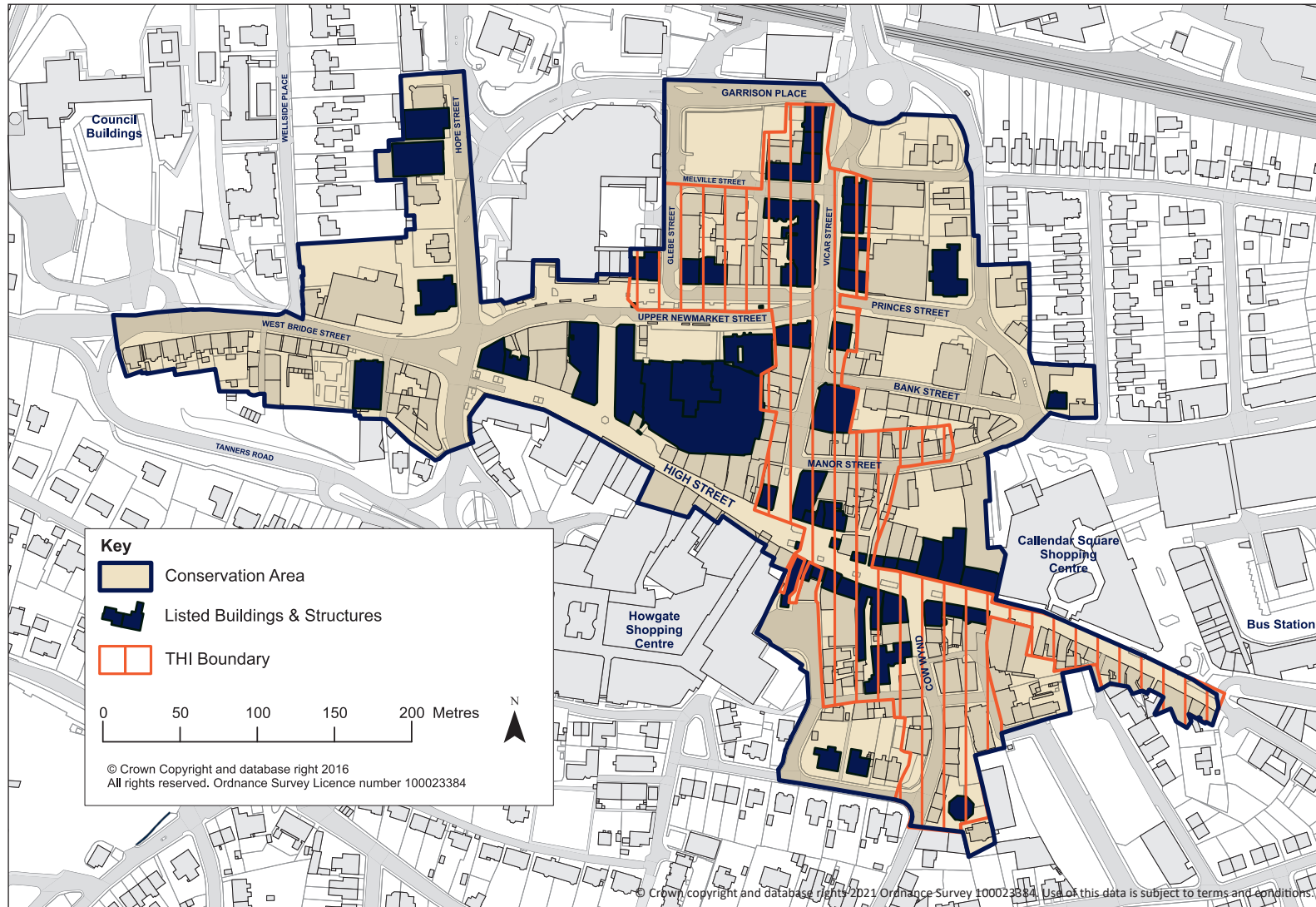


A conservation area appraisal was carried out to support the Townscape Heritage Initiative (THI) Bid and to assess the Town Centre's historic environment. In particular the appraisal identified the following key features of the townscape:

- Distinctive topography; the Parish Kirk and Town Steeple occupy the top of a low ridge. The High Street spreads along the south side of the same ridge;
- Surviving remnants of the early street pattern with narrow plots, closes and wynds off a central spine;
- Legacy of fine buildings from the industrial and commercial boom of the 19th and early 20th century;
- Varied streetscape interspersed by open space including historic churchyards and gardens;
- Decorative roof features including turrets, dormers, crow step gables and cast iron detailing;
- Diversity of traditional materials including a variety of natural sandstones with polished and textures finishes, brickwork to gables and rear elevations, Scottish slate and localised use of pantiles and tiles;
- Traditional timber sash and case windows predominate incorporating variations in glazing pattern, design and proportion;
- Several groups of traditional shop fronts survive, in some cases incorporating decorative glazing and tiling;
- Richness and variety of commercial ecclesiastical and residential buildings, including neo classical, Gothic, Scots Baronial, Italianate, Renaissance, Romanesque, Art Deco and post Modernist; the quality of the buildings is reflected in the number of buildings in the conservation area listed for their special architectural or historic interest.

3. Falkirk Environment

Map 2: Falkirk Town Centre Conservation Area, Listed Buildings and Townscape Heritage Initiative (THI)



3. Falkirk Environment

Listed Buildings

A large number of buildings in the High Street are listed. Two notable buildings are Category A listed, the Old Parish Church (including burial ground, boundary wall and railings) and Falkirk Town Steeple. Listed buildings and structures are highlighted on [Map 2](#).

Falkirk's Townscape Heritage Initiative (THI)

The 5 year THI was completed in 2018. The aim of the THI has been to breathe new life into Falkirk's historic town centre, by improving the physical appearance of the area and enhancing its assets. Between 2013-2018, £5.5 million was invested in the town centre, primarily focused on repairing and restoring historic buildings and structures, improving the public realm, restoring shop fronts to their traditional design and bringing vacant floorspace back into use. The THI has not only made a significant contribution to the physical appearance of the town centre, but has had a significant impact on vacancy rates. The THI has stimulated the re-use of upper storeys for residential use, with one property developer going on to buy more units within the THI to convert to residential use.

Heritage Trail

Falkirk's Heritage Trail links 25 sites of interest in and around the Town Centre, each has a blue plaque with details of the location and its historical importance. This trail has been enhanced further by Falkirk's THI heritage trail app which complements the existing blue plaque town trail but gives users access to more content including historical photographs. It is designed to be used both as visitors walk around the town and as a stand-alone learning resource. The tour covers sights including the Old Burgh Buildings, the old Barrs Inn Bru site, and Falkirk Trinity Church and graveyard.

Public Realm Improvements to Lower Lint Riggs and Newmarket Street area
Looking forward, an opportunity to undertake public realm improvements in the lower Lint Riggs and Newmarket Street area has been identified. The proposals will improve the safety for pedestrians at Newmarket Street by improving the visibility around the bus stops outside Asda. The project introduces high quality natural stone surfacing with attractive landscaping planting and integrated seating areas which will complement and reflect the recent THI improvements. Funded by the Scottish Government through the Town Centre Fund, proposals to date have been developed through partnership between Falkirk Council and First Bus. Construction is scheduled to begin in 2022.

Conservation Area Regeneration Scheme 2 (CARS2)

The Council appointed ZM Architects to prepare a feasibility study for works to priority buildings identified in Falkirk Town Centre for a future CARS 2 submission bid. Historic Environment Scotland has currently closed the CARS scheme but this project is available once launched again.

Falkirk Town Centre Vacant Repurposing Feasibility Grant Scheme (TCVRFGS)

This grant initiative focuses primarily on assisting building owners with under used and vacant upper floors within the Town Centre area and also addressing the issue of oversized commercial units at ground floor. The purpose of the scheme is to encourage owners to re-use vacant upper floors in buildings in the Town Centre for residential conversion. Work being undertaken by ZM Architecture aims to ensure that projects can move forward swiftly once additional funding becomes available through programmes such as CARS.

3. Falkirk Environment

Vacant and Derelict Land

There is only one site in the Vacant and Derelict Land Survey that falls within the Town Centre - a relatively small gap site in Bank Street. Whilst vacant and derelict land is not an environmental issue, the increasing incidence of vacant properties clearly does impact on the environment of the Town Centre.

Cleanliness

Falkirk Delivers commissions Keep Scotland Beautiful (KSB) to audit Falkirk Town Centre annually. This allows the BID and the local authority to monitor Council's baseline services for the Town Centre and ensure BID projects add value over and above Council provision in accordance with the BID's remit. The last audit of the cleanliness and environmental standards of Falkirk BID was conducted by KSB in 2019 using the Keep Scotland Beautiful methodology. This was the eleventh and last audit to be undertaken for the Falkirk BID, as there were no audits carried out in 2020-21 due to Covid-19 restrictions. 82 sites were assessed against the following criteria:

Cleanliness

Sources of litter

Types of litter

Adverse Environmental Quality Indicators

Litter bins

The recommendations of the 2019 report focused on the problem of smoking-related litter, which is prevalent across the whole area surveyed, and bird droppings, litter, shopping trolleys and waste for collection which all present problems in particular locations.

Falkirk Council and the BID have also launched a new working group focusing on greater co-ordination of the Council's waste teams to ensure better use of resources, and a rapid response to issues.

Figure 7: Comparison of Cleanliness Standards 2014-2019

Audit Year	Cleanliness Index	No of Sites Acceptable	No of Sites Unacceptable
2019	76	76	6
2018	69	78	4
2017	69	75	7
2016	71	74	8
2015	72	75	2
2014	79	77	0

Source: Keep Scotland Beautiful Independent Validation Audits

3. Falkirk Environment

Air Quality

The Council is required to review and regularly report the air quality in the Falkirk area by the Scottish Government. These measures are put in place to protect people's health and protect the environment. Out of the eleven automatic air quality monitoring sites across the area, two locations are within the Town Centre at Hope Street and West Bridge Street. Monitoring takes place to assess air quality and determine whether air quality objectives are likely to be achieved. If a local authority finds any places where objectives are not likely to be achieved it must declare an Air Quality Management Area (AQMA).

Falkirk Town Centre was declared an Air Quality Management Area (AQMA) in 2011 in recognition of the potential to exceed nitrogen dioxide levels. The Falkirk Town Centre Air Quality Management Plan (AQAP) was approved in June 2017 and focuses on long-term key actions to reduce air pollution rather than short term fixes. Key measures outlined are:

- Reducing emissions from individual vehicles;
- Promoting the EcoStars Fleet Recognition Scheme;
- Promoting alternative and sustainable modes of transport;
- Educating and informing the public on air quality issues.

Summary

- **Traditional town centre with pedestrianised High Street and historic street pattern still largely intact, offering a legible and permeable walking experience;**
- **Conservation area status and concentration of listed buildings provide valuable historic and architectural interest;**
- **£5.5 million has been invested in the Town Centre by Falkirk's THI improving its physical appearance and enhancing existing assets, and a range of additional enhancement measures in hand;**
- **Incidence of vacant and derelict land is low but scale of vacant properties is clearly an environmental issue;**
- **Higher than national cleanliness rating by Keep Scotland Beautiful Audit;**
- **Designated AQMA, with air quality within the town centre currently meeting with Council objectives.**

The Council has made significant progress in implementing these measures and, since its introduction, the air quality within the Falkirk Town Centre AQMA has shown a decrease in all pollutants measured. There are now 39 electric vehicle charging bays throughout the Falkirk Council area, with an additional 63 to be installed in the upcoming year. In August 2020 a £1.4m charging hub facility was opened at Falkirk Stadium which has charging capacity for 26 vehicles and is the second largest charging facility in Scotland.

3. Falkirk Community

Involvement of the community - both the general public and the business community - is an important feature of any healthy town centre. The following summarises current levels of engagement. Likewise the views and perceptions of users of the Town Centre are vital in identifying issues and formulating future plans.

Engagement

Business Engagement

The major vehicle for business engagement is the Business Improvement District (BID), which has engaged heavily with businesses through the pandemic, offering support and advice. Last year, the Council asked for feedback from local business sectors on the impact of the Covid on trade. This feedback was used to inform the Council's Economic Recovery Plan which brought £1.3m of additional support to directly support business resilience and the local economy over 3 years. Whilst restrictions have eased significantly, Falkirk Council is about to undertake further engagement with businesses via a business survey and sector specific focus groups to help plan and prepare for the future through understanding what local businesses require to support their resilience and survival rates. In addition a Retail Focus Group has taken place to help gain further information as to how the pandemic has impacted this sector. This information fed into the Economic Strategy for Falkirk and will help respond to future opportunities and threats to the Town Centre's business base.

Public Realm Engagement

As outlined in the Environment section, the Council is investing significantly in the public realm area at Newmarket Street and Lint Riggs to enhance this important transport and retail hub. The proposal brings together partners and incorporates three projects into one, thereby eliminating unnecessary consultation and disturbance to the community. This project demonstrates the significance of community engagement, as feedback received via the extensive engagement exercise has been used to inform the final design proposals.

3. Falkirk Community

Attitudes and Perception

A shopper survey was undertaken by Lichfields in June 2019, as part of the retail impact assessment study for the Falkirk Gateway. It gives a helpful insight into shoppers' perception of the Town Centre pre-Covid. Some of the more significant insights have been extracted and are outlined below. The survey confirms that Falkirk is an accessible centre for those arriving by car/bus, with a good supply of car parking available. Those accessing the town by train is extremely low at less than 1%. Significantly, nearly 70% of shoppers indicated they never come into the town centre in the evening. Shoppers who were critical of the town centre environment were extremely low.

- 20.7% will visit cafes/restaurants/takeaways whilst shopping;
- 89.5% found it very/quite easy to find a car parking place;
- 37.3% dislike the lack of large shops/national multiples, 27.3% the lack of specialist shops;
- 17.3% dislike the fact that there are too many empty shops, but only 2.7 % mentioned unattractive environment;
- 68.7% never come to Falkirk Town Centre for leisure purposes in the evening.

Summary

- There is ongoing engagement with local business and community from both the BID and the Council;
- Engagement with the public over the Newmarket Street/Lint Riggs enhancement has brought positive benefits for the scheme;
- There is an ongoing programme of community events, most recently SHOP26;
- Public surveys have been carried out which give an indication of visitor behaviour and preferences.

More recently, post-Covid, a high street survey was undertaken by Falkirk Delivers. Those taking part in the survey were asked a number of questions, including the following:

- What have you missed most about not being able to visit the High Street?
 - Meeting friends for coffee - 31.43%
 - Going to a restaurant or pub for a meal - 27.43%
 - Trips to local hairdresser/barber/nail studio - 10.29%
- What changes do you want to see on your High Street?
 - Increase in cleaning and sanitation - 72.57%
 - More outdoor seating - 48.57%
 - More planting and green spaces - 44.00%
 - More activities for children with social distancing - 34.29%
 - More outdoor caterers/kiosks - 34.29%

The first question is insightful as the three highest scoring responses indicate that responders have missed experience-based activities, rather than the shopping traditionally associated with town centres. Similarly in the second question the top five responses relate to the town centre environment, with no mention of shopping representation. These responses emphasise that the town centre provides a valued recreational experience for the surrounding community and Falkirk offers much more than a retail centre.

3. Falkirk

Commercial Viability

Vacancies

An assessment of the vacancies within the Town Centre was undertaken as part of the Council's Retail Floorspace Survey, most recently undertaken in 2019 and 2021. **Figure 8** below shows percentages of vacant floorspace and units in these years, both based on the previous Town Centre boundary which included Central Retail Park, and the new boundary which excludes Central Retail Park.

Figure 8: Vacant Floorspace and Units 2019 and 2021

Vacant Floorspace and Units	2019	2021
Percentage of floorspace vacant including CRP	16.3%	19.9%
Percentage of floorspace vacant excluding CRP	20.7%	26.3%
Percentage of vacant including CRP	16.0%	17.8%
Percentage of vacant excluding CRP	17.1%	18.6%

The figures clearly show a significant increase in vacant floorspace between 2019 and 2021, with a less marked increase in vacant units, reflecting the fact that recent new vacancies have been larger units. Significant store closures over this period have included Debenhams, Dorothy Perkins, Wallis and Iceland. The figures also demonstrate how the inclusion of Central Retail Park has tended to suppress the levels of vacancy, and mask the severity of the situation in the Town Centre, since vacancy levels in the retail park have remained consistently low.

Further analysis of the figures was carried out to understand variations in vacancy rates within the Town Centre, in particular between the primary area comprising the High Street, Howgate and Callendar Square and the non-primary areas. This is illustrated in **Figure 9**.

Figure 9: Vacancy Rates in Primary and Non-Primary Areas 2019 and 2021

Vacancy Rates in Primary and Non-Primary Areas	2019	2021
Percentage of vacant units in primary area	24.0%	33.3%
Percentage of vacant floorspace in primary area	33.0%	33.0%
Percentage of vacant units in non primary area	12.8%	11.1%
Percentage of vacant floorspace in non primary area	6.3%	10.4%

The figures show that the primary area has much higher vacancy levels than the non-primary areas. This reflects the lack of demand for larger units and the higher rental/rates levels within the primary area. The non-primary area, generally characterised by smaller units occupied by independent businesses, is proving more resilient and indeed the figures show a small reduction in the number of vacant units within these areas between 2019 and 2021.

3. Falkirk

Commercial Viability

There is evidence of long-term vacant units across the Town Centre.

Figure 10 identifies the number of units identified as vacant from surveys undertaken in 2014, 2019 and 2021.

Figure 10: Long Term Vacancies 2014-2021

Long Term Vacancies 2014-2021	Number of Units
Number of units vacant since 2014	28
Number of units vacant since 2019	13
Total number of long term vacant units	41

27 out of 41 of the long term vacant units are located within the primary area. Areas where long term vacancies are particularly apparent are at the east and west ends of the High Street, and Callendar Square Shopping Centre.

Footfall

Footfall data was historically collected by the Howgate Centre only, which does not necessarily reflect footfall across the Town Centre. The Howgate figures shows year on year decreases in footfall within the centre since 2014.

Utilising the Scottish Government's Town Centre Capital Fund, the Council has invested in new footfall sensors in the Town Centre. Initially only covering two main access points in the Town Centre, the system has been expanded to cover all of the main access areas including Newmarket Street, Cockburn Street, Cow Wynd and Callendar Road/High Street. Using the latest technology, the system tracks Wi-Fi enabled devices to gain robust data on visitor numbers, dwell times, who uses the town and when they return (97% accuracy). This information enables the Council to make informed decisions based on data gathered around economic interventions and events and helps to determine when to undertake works which may cause disturbance to town centre users.

A snap shot analysis of the footfall figures from May 2021 indicates that there were 145,067 visitors, of which 73,610 (51%) had visited previously. The busiest zone was Newmarket Street with 93,553 visitors. The busiest day was Friday 28th with 5,733 visitors, the busiest time generally was between 15:00 and 16:00, and the average dwell for the day was 121 minutes. The change in footfall compared to the previous month showed a 25.13% increase.

3. Falkirk

Commercial Viability

Retail Status and Performance

CACI is commissioned periodically to produce an overview of Falkirk Town Centre's retail status and performance. The latest report, from September 2019, identifies the following:

- Falkirk's retail ranking within Scotland has fallen slightly from 18th to 19th place since 2016 in terms of its comparison goods market potential;
- Falkirk is now classified as a 'Value Major Town Centre', reflecting a retail mix dominated by value (44%) and mass market (52%) brands;
- Falkirk is located within a competitive catchment, but retains a strong comparison goods market share of 33.9% in its core catchment (Falkirk/Larbert/Grangemouth/Braes), compared to 33.4% in 2016), reflecting a strong local shopper base. Central Retail Park's market share within this catchment has increased significantly from 30.1% to 41.9%, but that of other competitors (notably Glasgow, Stirling, Edinburgh and Cumbernauld) has decreased, indicating that expenditure leakage to centres outwith the area is reducing;
- Falkirk serves a diverse catchment population. In terms of the Acorn customer categories, there is a high proportion of both Affluent Achievers and Financially Stretched groups. These different groups have different retail preferences. The challenge for Falkirk is to provide a compelling retail offer that appeals to shoppers across the demographic spectrum it serves;
- When benchmarked against similar centres across the UK, Falkirk is shown to be particularly strong on clothing and footwear, and convenience goods, with potential areas of deficit being leisure goods, personal goods and catering.

A Retail and Leisure Statement prepared in conjunction with the Falkirk Gateway proposals in October 2019 provides some additional information on retail patterns and market share. This study defines the Town Centre's catchment as the Council area rather than the slightly more limited area used in the CACI study. For convenience goods, the Town Centre's market share is 18.2%, based on Asda and Morrisons. Tesco is now defined as being outwith the Town Centre, but if this and M&S (both now defined as being in Central Retail Park) are included, this would increase the figure to 30.6%. As highlighted previously, convenience shopping has always been an unusually strong component of Falkirk's offer, although this has diminished over recent years with the policy of decentralising of food retailing to local communities. For comparison retailing, market share is estimated at 24.7%, compared with Central Retail Park's 26.3%. These are lower figures than CACI because of the wider catchment definition.

The Javelin Group's Venuescore ranks the UK's top 3,500 retail destinations, giving them a weighted score based on number of multiple retailers present, and the score attached to each retailer weighted depending on their overall impact on shopping patterns. For 2016, Falkirk's score and ranking, in comparison with other centres, is shown below.



3. Falkirk

Commercial Viability

Figure 11: Venuescore Rankings for Falkirk and Selected Scottish City/Town Centres 2016

Scottish City/Town Centres	UK Rank (2016)	Scotland Rank (2016)	Venuescore	Location Grade
Glasgow City Centre	2	1	776	Major City
Edinburgh City Centre	9	2	498	Major City
Livingston Town Centre	36	4	289	Major Regional
Stirling City Centre	83	6	197	Regional
Silverburn Shopping Centre	150	11	148	Regional
Dunfermline Town Centre	192	14	125	Sub Regional
Falkirk Town Centre	211	17	115	Sub Regional
Kirkcaldy Town Centre	238	19	105	Sub Regional
Cumbernauld Town Centre	255	21	100	Sub Regional
Paisley Town Centre	300	23	90	Sub Regional
Gyle Shopping Centre	329	25	83	Sub Regional
Glenrothes Town Centre	332	26	82	Sub Regional
Central Retail Park	537	39	56	Major District

It is likely that Falkirk's position has weakened since 2016 with the loss of further national multiples such as M&S. While the disappearance of major retail chains over recent years has undoubtedly had a major impact on Falkirk's retail status and overall appeal, it must be remembered that this is a national trend which has affected all centres, and particularly sub regional centres such as Falkirk. It reflects structural changes in the way people shop and in the retail industry more generally.

3. Falkirk

Commercial Viability

Prime Rental Levels and Yields

Information on levels of prime rent and prime yields in Falkirk and other comparable centres in Scotland, and how these have varied over time, was presented as part of the Falkirk Gateway Retail and Leisure Statement. These are shown in Figures 12 and 13 below.

Figure 12: Prime Rentals for Falkirk and Selected Scottish City/Town Centres 2005-2019

City/Town	Population	Prime Rent (£ per square feet Zone A) 2005	Prime Rent (£ per square feet Zone A) 2015	Prime Rent (£ per square feet Zone A) 2019
Glasgow	626,400	255	260	317
Edinburgh	518,500	220	180	240
Stirling	37,610	115	115	115
Livingston	57,030	75	90	90
Falkirk	35,850	88	60	60
Ayr	46,780	88	60	60
Dunfermline	53,100	78	60	60
Irvine	34,090	65	45	45
Dumfries	33,440	60	45	45

Figure 13: Prime Yields for Falkirk and Selected Scottish City/Town Centres 2005-2019

City/Town	Population	Prime Yield % 2005	Prime Yield % 2015	Prime Yield % 2019
Glasgow	626,400	5	4.75	4
Edinburgh	518,500	4.5	5	4.75
Livingston	57,030	7	6.5	7
Dunfermline	53,100	6	8	9
Stirling	37,610	5	8	9
Falkirk	35,850	6	9	10
Dumfries	33,440	6	9	10
Irvine	34,090	6	9	10
Ayr	46,780	6	9	10

3. Falkirk

Commercial Viability

Falkirk's Zone A rental levels were pitched at about £60 per sqft in 2019. Whilst lower than Stirling and Livingston, which have a much stronger comparison retail offer, this is of a similar level to centres of comparable scale such as Dunfermline and Ayr. Generally, while rental levels have stabilised in the last few years, demand for commercial property has declined in all but the strongest centres over the last fifteen years or so. This is reflective of the retail and socio economic trends previously mentioned.

Yields are calculated, in percentage form, as an annual return on capital investment, and are an indicator of investor confidence, with decreasing yields reflecting a more buoyant property market. Again, levels of prime yield increased only slightly over the period 2015-2019, and whilst they have gone up more significantly in the last 15 years, this reflects the position in the majority of centres nationally.

Summary

- **Overall, the percentage of vacant units and amount of vacant floorspace has increased between 2019 and 2021. Closer analysis shows that the critical issue is with very high levels of vacancy in the primary area of the High Street/Howgate/Callendar Square. Secondary areas have proved more resilient with the number of vacant units actually declining;**
- **In terms of CACI 2019 data, Falkirk's status as a retail centre has slipped marginally since 2016. However, its comparison goods market share in the immediate core catchment has held up well, indicating a strong local shopper base. In terms of its competitors, although Central Retail Park has increased its market share, leakage to centres outwith the area has declined slightly;**
- **Whilst the continuing loss of national multiples is a concern, this is a trend affecting all sub regional centres such as Falkirk and reflects wider socio economic and industry factors;**
- **Although prime rents and yields, which indicate commercial demand and investor confidence, have declined significantly since 2005, they appear to have stabilised more recently.**

3. Falkirk

Regeneration Activity

Business Improvement District

Falkirk was one of Scotland's first Business Improvement District (BID) areas. Established in 2008 and now known as 'Falkirk Delivers' it is funded by a small levy from businesses in the Town Centre based on the rateable value of their property. The organisation is also supported financially by the Council to provide a number of data led environmental, safety and footfall driving measures. The organisation is also undertaking additional economic recovery measures to Falkirk and the District town centres in line with Falkirk Council's Economic Recovery Plan. These interventions aim to support business resilience and community well-being. Working closely with the Council, it has been responsible for a number of retail, business and hospitality initiatives to enhance both daytime and evening economies.

As an integral partner, Falkirk Delivers operates the Council funded Safer Streets Initiative which brings together key public services including Police Scotland and the Scottish Ambulance Service as well as a private security provider and volunteers to deliver a Safebase and Taxi Marshalling service. This service aims to reduce anti-social behaviour, improve business and consumer confidence and support town centre residents at key times in the evening economy calendar. The organisation is also responsible for a range of events throughout the year to encourage tourism, connect local people to the town and improve the trading environment for business. Overall, the organisation has invested £2.2 million in the town centre over its three terms since 2008, and it is estimated that Falkirk Delivers has been responsible for an additional £2.6m spend in the Town Centre.

More recently, the BID has played an important role in the response to the Covid 19 pandemic and made a radical shift to move to an emergency footing to deliver support to the business and residential communities in the area. Working very closely with the Council, voluntary and third sectors to coordinate and deliver support to the most vulnerable, the organisation worked hard to aid the town's recovery during the pandemic. Attracting Bid Resilience Funding enabled the introduction of a number of environmental and safety initiatives across the area.

Following a ballot in August 2021, the BID was renewed for a fourth term extending to 2026, with some 87% of votes cast in favour of the initiative continuing, generating approximately £159,930 investment of BID levy income per annum over the 5-year term. It will work towards delivery of a range of projects, initiatives and services as set out in its 5-year business plan.

3. Falkirk

Regeneration Activity

Partnership and Action Planning

A 'Revitalising Falkirk' Town Centre Partnership was established in 2019 with a diverse range of stakeholders represented. A vision for the Town Centre has been agreed, along with an Action Plan built around a number of themes including governance, communication, hubs, reinvigorating retail, residential and infrastructure.

Covid Response and Recovery

The Covid 19 pandemic has presented major challenges for the Town Centre, with successive lockdowns and imposition of regulations having a major impact on businesses and the trading environment. In the face of these challenges, a wide range of business support has been provided through the Council, Falkirk Delivers and partners to support economic recovery. This has included co-ordinated support and advice to businesses in accessing the variety of business grant funding schemes and adapting trading to new regulations (outdoor seating areas etc); the recruitment of additional Falkirk Delivers staff to support response and recovery activity; additional maintenance resources to support Covid 19 compliance measures and improve stewardship of public spaces and trading areas; support to businesses in improving their digital presence; and parking management changes to provide more flexibility for short term parking. Falkirk Council also set up a Covid-19 working group, which has enabled the Council, the BID and other partners such as Police Scotland to respond quickly to ongoing issues and put in place innovative solutions to restrictions such as outdoor seating provision and licensing, and social distancing measures.

Current and Future Projects

A number of regeneration projects and initiatives are currently being progressed in support of regeneration and recovery in the Town Centre. These include shorter term actions to boost recovery, as well as larger, longer term projects linked to the Council's Town Centre Capital Fund and Investment Zone Growth Deal programme. These include:

- A repurposing grant scheme, offering grants for design and feasibility work to repurpose large vacant units in the High Street;
- Public realm improvements in Newmarket Street and Lint Riggs;
- The introduction of public Wi-Fi to the Town Centre;
- Feasibility work into a potential bid for a second Conservation Area Regeneration Scheme (CARS) in the Town Centre, as a follow on from the successful Townscape Heritage Initiative;
- Falkirk Central Sustainable Transport Network, an Investment Zone project which seeks to create a new Falkirk Central Transport Hub at Falkirk Grahamston station and develop a green active travel corridor from Falkirk to Grangemouth;
- Council HQ and Arts Centre Project which has the potential to assist in the regeneration of the Town Centre.

3. Falkirk

Regeneration Activity

Development Opportunities

Falkirk LDP2 identifies Falkirk Town Centre as a Major Area of Change and identifies a range of development opportunities which have the potential to contribute to the regeneration of the Town Centre. The Council HQ/Arts Centre project has prompted further investigation of these and other sites.

Grahamston (MU12)

This site provides an important arrival point to the Town Centre, with the large areas of surface car parking offering potential for redevelopment and enhancement. The emerging proposal for Falkirk Central Transport Hub is likely to be the focus for this site.

Falkirk East End/Callendar Square (MU13)

This site anchors the High Street at the East End. Callendar Square has very high levels of vacancy, although part has now been leased to the Department of Work and Pensions. To the east of Callendar Riggs, the former bus station remains vacant, but other uses are relatively stable and the overall scale of redevelopment here appears to be more limited than envisaged in LDP2.

Williamson Street (MU15)

This site has been developed by Link for social housing.

Bank Street (MU14)

There has been no movement on this gap site. The previous mixed use consent has lapsed.

Municipal Buildings

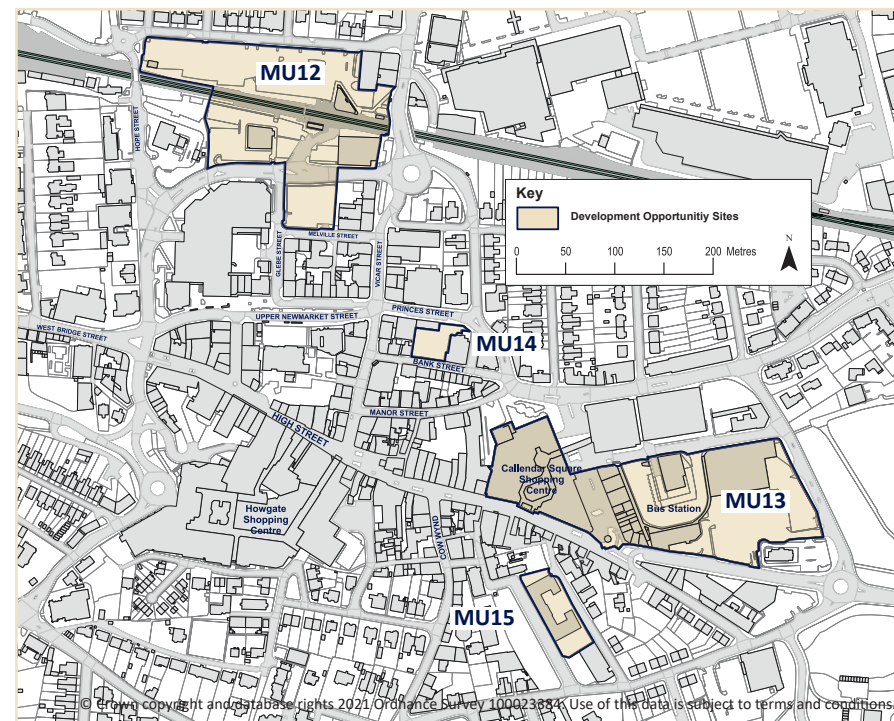
The Council's current preferred option is to rebuild the Council HQ on this site, with a refurbished Town Hall. If this proposal is pursued, it seems unlikely that there will be any surplus land available for other development.

High Street/Cockburn Street

This site comprises predominantly a 1960s block in poor condition and with high levels of vacancy. This was assessed as a potential site for redevelopment of the Council HQ/Arts Centre but may not now be taken forward following the Council's decision to focus the project on the Municipal Buildings site.

The decision on the location of the Council HQ/Arts Centre potentially provides the starting point for the development of a wider masterplan for the Town Centre, including further consideration of the role of the various opportunities, and their relationship to other access, public realm and placemaking interventions needed to adapt and transform the centre.

Map 3 : Development Opportunities in Falkirk Town Centre



Source: Falkirk LDP2 August 2020

3. Falkirk

Regeneration Activity

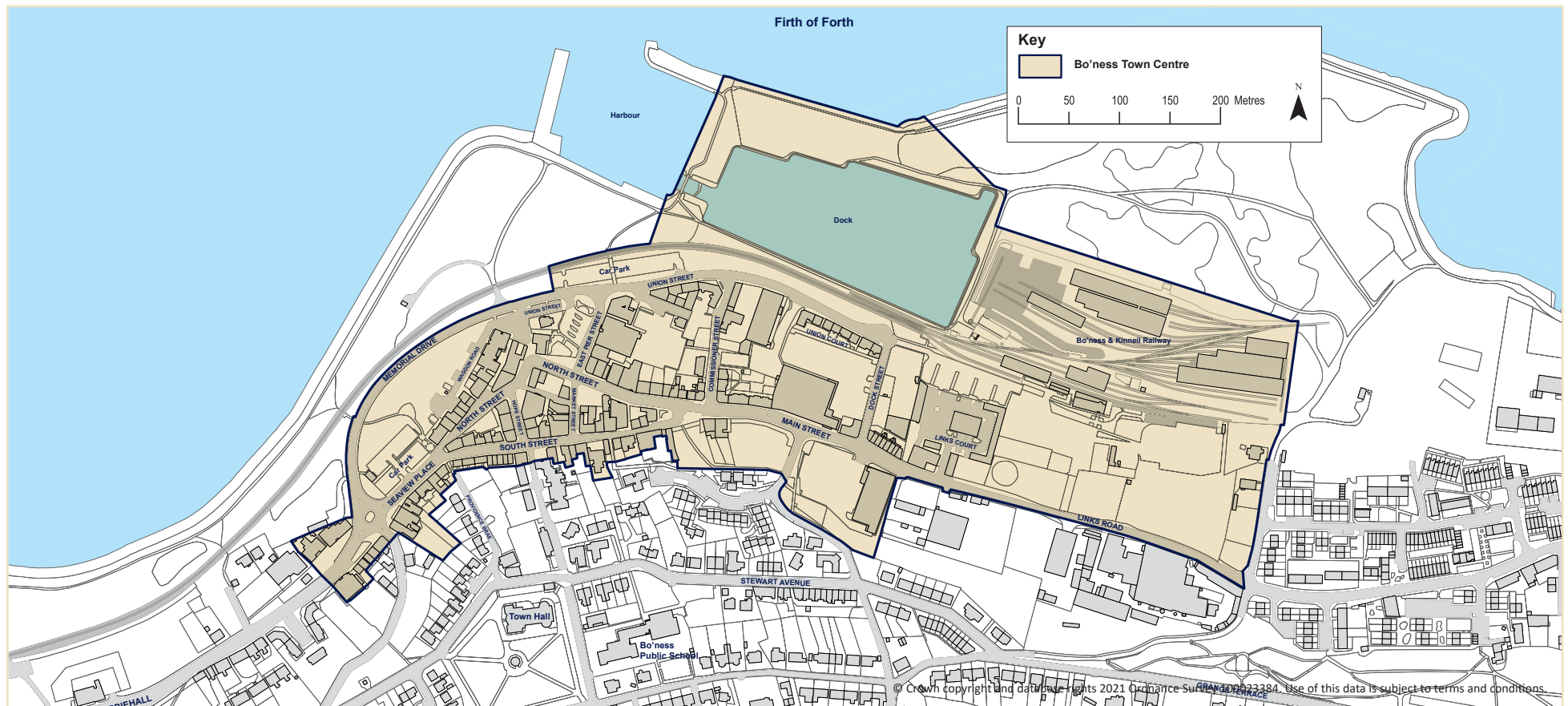
Summary

- The Town Centre has a successful Business Improvement District (BID) which was first introduced in 2008, and has recently been extended for a fourth term to 2026;
- A new Town Centre Partnership was formed in 2019 which is working to deliver an Action Plan for the revitalisation of the Town Centre;
- Concerted support from various partners has been given to Town Centre to assist businesses through the Covid 19 pandemic;
- A variety of short and longer term regeneration projects are being investigated and promoted to support recovery of the Town Centre. These include the Council HQ/Arts Centre project and a Falkirk Central Sustainable Transport Hub;
- Various development opportunities exist within the Town Centre and work on a town centre masterplan is being considered.

4. Bo'ness Overview

Bo'ness is a small traditional historic burgh centre adjacent to the River Forth which provides local shopping and services for a population of 14,361. It is distinguished by its exceptional historic environment, which is a conservation area, and its tourism potential arising from various attractions in the town.

Map 4 : Bo'ness Town Centre



4. Bo'ness Activities and Uses

Figure 14: Bo'ness Town Centre Floorspace Survey 1996-2021

Year	Convenience Floorspace	Comparison Floorspace	Service Floorspace	Vacant Floorspace	Total Floorspace	Conv Units	Comp Units	Service Units	Vacant Units	Total Units
1996	4,000 m ²	2,610 m ²				18	26	35	14	93
2004	3,622 m ²	2,811 m ²	3,436 m ²	1,635 m ²	11,504 m ²	16	30	35	10	91
2009	4,995 m ²	1,649 m ²	4,664 m ²	1,134 m ²	12,442 m ²	11	26	43	12	92
2014	5,098 m ²	2,423 m ²	4,631 m ²	826 m ²	12,978 m ²	13	29	44	9	95
2019	5,101 m ²	2,141 m ²	4,138 m ²	1,172 m ²	12,552 m ²	14	27	41	12	94
2021	5,201 m ²	1,973 m ²	4,128 m ²	1,113m ²	12,415 m ²	15	24	46	14	99

Since 2019, there has been a decline in comparison shopping in terms of both number of units and floorspace. This is a long term trend in all the district centres. Those comparison shops that remain nonetheless still add to the character and appeal of the centre. Convenience retailing remains stable and is a key part of the Town Centre's function, expanding slightly since 2019, notwithstanding that the majority of this is focussed in the Tesco and Lidl stores at the extreme eastern end of the Town Centre.



4. Bo'ness Activities and Uses

Services have grown by floorspace and number of units, and these likewise constitute a vital element in the Town Centre's make up, often filling units vacated by retail shops. Hairdressers, barbers and beauty salons in particular are an increasingly important component. Financial, legal, property and health services still figure prominently, although the Post Office and Lloyds TSB have closed since 2019. Cafés and takeaways are a key part of the mix, although it is clear that this sector is under pressure.

Bo'ness has a significant tourism function which is anchored by the Bo'ness and Kinneil Railway and the Scottish Railway Exhibition, both run by the Scottish Railway Preservation Society, and based at Bo'ness Station at the north east edge of the Town Centre. The route of the John Muir Way, a new cross-Scotland long distance route, runs adjacent along the Foreshore. Kinneil Estate, to the west of the town, provides a further tourist destination. Historically, the Town Centre has seen relatively little benefit from the visitors which have come to the railway or other attractions, but the potential remains. The Hippodrome cinema continues to provide a critical leisure attraction and arts venue in the heart of the Town Centre. Otherwise, supporting tourism infrastructure in the Town Centre is limited. There are some cafes, but a lack of quality restaurants and bars. Hotel accommodation in the town is limited to the Richmond Park Hotel, to the south of the town centre, although this is supplemented by a few Airbnb properties. Bo'ness library, which has associated meeting rooms, and the Hippodrome, provide the focus of social and community use.

The residential population of the Town Centre is estimated at around 400, which is relatively high compared with other Town Centres. There is a reasonable stock of tenement flats dated from Housing Action Area investment and activity in the 1970s and 1980s. There is conversion of upper storey space to residential in the former Woolworths building and opportunities for additional residential use through both conversion of vacant floorspace and new build at various small infill sites. These can contribute to regeneration through dealing with vacant sites and increasing the resident population. A proposal to redevelop the Cochranes foundry site in Union Street now has planning permission and is expected to progress. Other infill opportunities at Main Street and Dock Street have stalled. Flood risk and HSE constraints arising from the BP Forties pipeline can pose constraints to new buildings and uses in the Town Centre.



4. Bo'ness Environment

The Town Centre is reasonably compact and based around the historic street pattern with ground floor shops and tenement properties predominating. The two supermarkets, although within the defined centre, are slightly off-centre, which may limit the extent of shared trips to the stores and other Town Centre shops.

The Town Centre's historic environment is exceptional and is a major asset. Bo'ness Town Centre Conservation Area was designated in 1975. The most recent conservation area appraisal highlighted a number of outstanding features such as its historic street pattern, with narrow streets and closes; its range of historic buildings, many of which are listed, dating back in some cases to the 16th century; its relationship with the heritage railway and the old dock and harbour; its original shopfronts; and its relationship to the Forth with fine views to and from the estuary.

The Town Centre was subject of a £5m Townscape Heritage Initiative (THI) which was completed in 2012. This helped restore the historic fabric of the town, through bringing vacant properties back into use, such as the Hippodrome, improving the streetscape and shopfronts, and making tenemental repairs. Most, although not all, new shopfronts are of good quality, suggesting that the THI has had some lasting effect in terms of raising the quality of design.

The key public spaces in the Town Centre are grouped around the junction of North Street, Market and East Pier Street. Their quality is generally good, having benefited from THI and more recent investment. The adjacent bus station is less attractive. Other smaller spaces which have been improved include the area in front of the Hippodrome and the East Partings. The Foreshore provides an extensive and attractive semi-natural greenspace overlooking the Forth, through which the John Muir Way runs, and which has been subject to recent investment in path infrastructure, public art/interpretation and wild flower planting.

There is a low incidence of vacant and derelict sites within the core of the Town Centre, the key one being the former Cochranes foundry site in Union Street. The vacant former Woolworths store on North Street/South Street has been brought back into use.

4. Bo'ness Commercial Viability

There has been a net increase in the percentage of vacant units in the Town Centre since 2019, now standing at 14%. As a note of caution, when the 2021 survey was carried out, in the aftermath of Covid 19, it was sometimes not entirely clear whether businesses had closed permanently or temporarily. Key new vacancies include the Post Office and Lloyds TSB. Since the survey, and not accounted for in the figures, the very prominent Bo'ness Bakery at East Partings appears to have fallen vacant. On a more positive front, the former Woolworths building has been brought back into use through conversion to three units with residential above. This has meant that, notwithstanding the increase in the percentage of vacant units, there has actually been a small net reduction in the figure for vacant floorspace since 2019. Overall, whilst the vacancy situation is concerning, the evidence is that that vacant units do find new uses, and the amount of long term vacant properties is quite limited.

Survey information from 2019 indicates that the Town Centre's convenience goods market share within the immediate catchment of the town sits at 58.2%. This is relatively high, considering that neither Tesco nor Lidl is particularly large, and confirms that convenience shopping is key to the Town Centre's ongoing viability. Leakage to Asda in Grangemouth amounts to 12.2%, whilst 17.5% leaks out beyond the Council area, mainly to Linlithgow. Comparison goods market share is not surprisingly more limited at 18.9%, although even this seems healthy given the limited comparison offer. Under LDP2, substantial growth is planned for Bo'ness over the coming years (over 1,300 homes over the period 2017-2030), which will extend the market potential and levels of local expenditure. The challenge for the Town Centre will be to capture trade from the new residents, most of whom will be living on the southern edge of the town.

In terms of future development opportunities, residential/commercial opportunities at Union Road, Main Street/South Street, and Links Road are identified in the Local Development Plan.

The town centre businesses are currently being supported by additional support measures via Falkirk Delivers to improve digital connectivity and improve the trading environment through a Handyman service.

The Council is currently delivering a number of Town Centre Capital Fund projects including the Bo'ness Library Accessibility Project, which responds directly to community aspirations for the extended use of this public building, the introduction of Ebikes, and the delivery of public Wi-Fi infrastructure.



4. Bo'ness Accessibility

The relationship of the Town Centre to the bulk of its catchment population is an issue. It is located on the Forth at the northern edge of the town, with the main residential areas lying on the more elevated land to the south. This is likely to act as a disincentive to walking and cycling. The Town Centre itself has no pedestrianised areas. An e-bike station is located at Union Street.

The Town Centre is served by various bus services, and has a small bus station on East Pier Street.

Bo'ness has a generous level of free parking. The 2007 parking survey indicates a capacity of 762 spaces, with peak occupancy on Friday 462 vehicles, and on Saturday 408 vehicles. The main off street car parks are at Seaview Place, Union Street and Register Street. Union Street car park has electric vehicle charging bays.

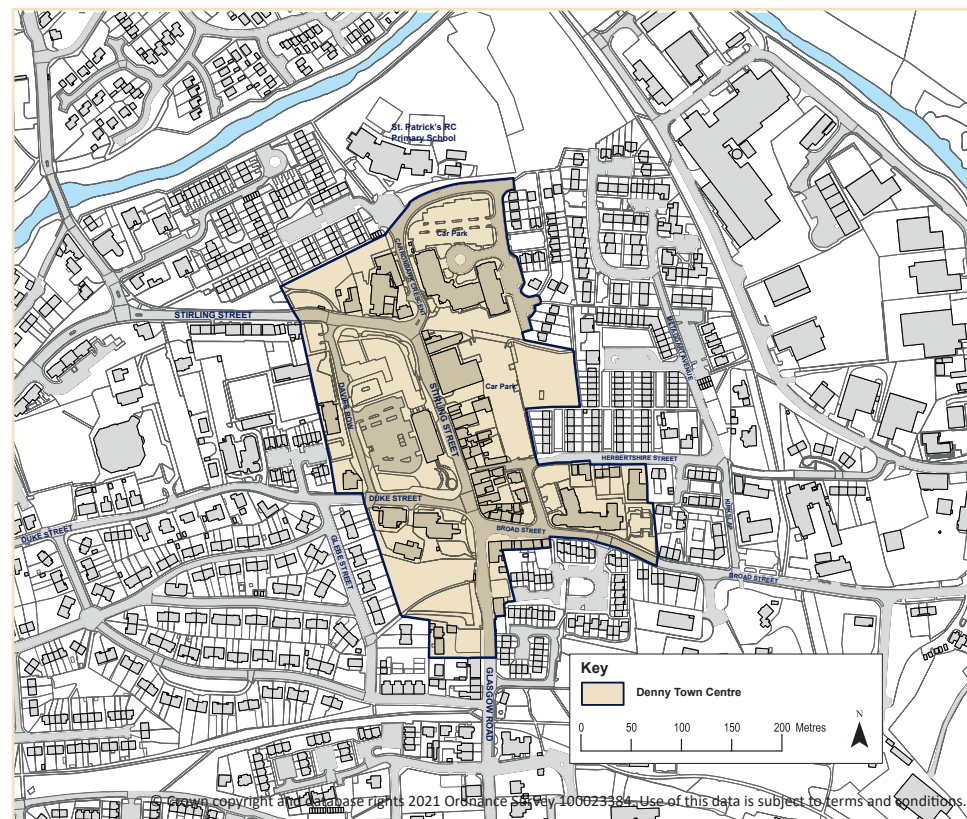
Summary

- The percentage of vacant units has risen, although the amount of vacant floorspace has remained fairly static;
- Convenience floorspace has increased slightly since 2019 and remains an important component of the Town Centre's offer. The main convenience anchors remain Tesco and Lidl at the eastern edge of the Town Centre, with Farmfoods in the middle enabling the town centre to retain a healthy 58.2% of the town's convenience expenditure;
- Comparison floorspace continues to decline, although these shops still add to the attractiveness of the centre;
- Service uses have grown, notwithstanding the loss of the Post Office and Lloyds TSB;
- Tourism potential remains substantial, given the presence of the Hippodrome, the SRPS, the John Muir Way, and other attractions in the town, but there is limited restaurant provision or accommodation in the Town Centre to support the tourism product;
- Residential use is a more prominent part of the make-up of the Town Centre than in some other centres, and housing proposals being brought forward, for example at Union Street, will further increase the Town Centre's population;
- The historic environment is a major asset, and there are ongoing efforts to conserve and enhance this, most recently through a building repair and shopfront grant scheme in South Street;
- Accessibility is hampered by the location of the Town Centre and the topography of the town.

5. Denny Overview

Denny is a small traditional burgh located in the west of the Falkirk Council area. The Town Centre provides local shopping and services for some 12,500 people. It has a traditional street pattern consisting of a main street (Stirling Street) and historic crossroads overlooked by an 18th century parish church. The traditional buildings on the east side of Stirling Street are recognised as an Area of Townscape Value. On the west side, a £7.8m Council development was completed in 2018, replacing a tired 1960s style precinct with a new community library, modern shop units, bigger car park and a community designed square with public art. A further two phases of development are still to take place.

Map 5 : Denny Town Centre



5. Denny

Activities and Uses

Figure 15: Denny Town Centre Floorspace Survey 1996-2021

Year	Convenience Floorspace	Comparison Floorspace	Service Floorspace	Vacant Floorspace	Total Floorspace	Conv Units	Comp Units	Service Units	Vacant Units	Total Units
1996	1,810 m ²	1,240 m ²				11	18	25	2	56
2004	1,783 m ²	939 m ²	2,476 m ²	138 m ²	5,336 m ²	11	15	30	4	60
2009	1,752 m ²	1,150 m ²	2,469 m ²	651 m ²	6,022 m ²	6	15	32	10	63
2014	1,619 m ²	856 m ²	2,779 m ²	397 m ²	5,651 m ²	5	11	34	7	57
2019	1,956 m ²	692 m ²	2,033 m ²	594 m ²	4,985 m ²	7	7	30	3	47
2021	1,857 m ²	942 m ²	2,658 m ²	195 m ²	5,652 m ²	7	12	34	3	56

5. Denny Activities and Uses

Convenience shopping remains an important function with a Co-op Food store anchoring the centre in the middle of Stirling Street. The number of convenience units is unchanged from the previous 2019 survey and, although overall convenience floorspace has declined, it is at its second highest level over the period 1996-2021. Convenience retailers, such as Greggs and Boots, are occupying some of the new units within Phase 1 of the redeveloped Town Centre. On the east side of Stirling Street, a family butcher and greengrocer continue to provide independent alternatives to the national food chains in terms of fresh produce. The comparison shopping offer is mostly local independent retailers, and there has been a net increase in comparison floorspace, reversing the decline witnessed in the period 2014 to 2019.

Service floorspace sharply declined between 2014 and 2019 as a direct result of three bank closures (Bank of Scotland, TSB and Clydesdale) in the centre. The RBS branch, outside the town centre on Glasgow Road, also closed within the same period. These bank closures reflect an on-going trend with the UK's bank branch network which is seeing a declining footfall with customers shifting online to access banking services. While Denny has lost all its four standalone banks, a OneBanks kiosk opened in the Co-op Food store in 2021 meaning face-to-face banking has returned to the town after a three-year absence.

The 2021 floorspace survey recorded an increase in service floorspace, reaching its highest level since 2014 and reversing some of the decline seen during the period 2014 - 2019. This improvement can be attributed to new service businesses, such as a funeral director, dog grooming service and ice cream parlour, moving into the centre. A wide range of services are still present including property services, bookmakers, a post office, cafes, and a wide choice of hairdressers, barbers and beauty salons.

Overall, the total number of units has declined from a high of 63 units to 56 units during the period 2009-2021. This is due to a combination of reasons including:

- Previous surveys included units (such as the former RBS on Glasgow Road) that are outside the centre's boundary. These units have not been surveyed since the 2014 survey;
- The former Clydesdale Bank in Duke Street has undergone a change of use to residential and thus is no longer surveyed;
- Phase 1 of Denny Town Centre's regeneration has demolished all the 1960s shopping parade, replacing some, but not all, units with new floorspace.

There is a good range of community uses, including the new library which forms part of the Phase 1 regeneration project. Carronbank House, at the northern end of Stirling Street, is not included in the floorspace survey, but provides a very important concentration of community services and business space. It houses a medical practice and a range of Council services. In 2018, it became the advice and support hub for the west locality area. A further medical practice is located at Denny Cross, and Broompark Community Hall is situated on Davies Row.

Residential use does not play a significant role in this small town centre, and has reduced in recent years following the demolition of the residential blocks at Church Walk. A small development of flatted Council housing on the old police station site in Broad Street is the only recent residential development.



5. Denny Environment

The Town Centre is very compact and essentially formed of four streets, with ground floor shops below service or storage premises on upper floors of predominantly two storey terraced properties. The striking, historic 18th century Old Parish Church bookends the southern end of the main shopping street, Stirling Street, at Denny Cross, while the 19th century St Alexander Church bookends the northern end of the street. Stirling Street presents a typically Scottish small town main street on its retained eastern side, and the redeveloped buildings on the western side have sought to complement this in terms of scale and design.

Phase 1 of the town centre regeneration project has seen a major improvement of the town's environment. Apart from the new building frontage mentioned above, the new town square provides an attractive focal point for the town centre, complemented by various items of public art. Phases 2 and 3 present further opportunities for townscape enhancement.

Levels of congestion at Denny Cross and through traffic on Stirling Street remain an issue for the quality of the environment. The Council has now committed itself to complete the final phases of the Denny Eastern Access Road (DEAR), which will help relieve congestion at Denny Cross, routing traffic away from the centre.

The town is benefiting from additional support via Falkirk Delivers on a number of business and environmental measures and modest investment via the Town Centre Capital Fund for Ebikes, public Wi-Fi and a Public Art Projector.

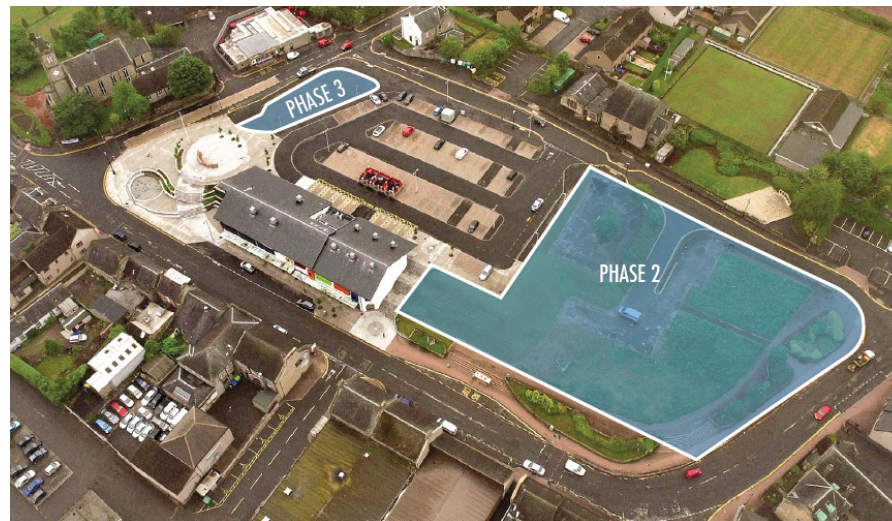


5. Denny Commercial Viability

The amount of vacant floorspace is sharply down from 2019 while the number of vacant units remains unchanged at 3 units. Vacancy rates for floorspace and the number of units were recorded by the 2021 survey as 7% and 5% respectively, which is relatively low, despite the impacts of Covid-19 on businesses. Two units in the Phase 1 redevelopment were recorded as vacant at the time of the 2021 survey, although one appeared to be subject to a fit out for a new tenant.

Denny Town Centre does not retain much of the town's convenience expenditure due to its lack of a large foodstore. Information from the Retail and Leisure Statement prepared in 2019 for the Falkirk Gateway proposals indicates a market share of only 8.3%. Leakage occurs to the out of centre Sainsbury/Iceland in Glasgow Road (market share 21.1%) and to stores on the western side of Falkirk (19.9%). With no sites of significant scale in the Town Centre, there is little opportunity to reverse this situation.

Phases 2 and 3 of the town centre redevelopment present potential opportunities for commercial development. In respect of Phase 2, the Council has agreed sale of the site for the development of a new Co-op store, as a relocation from the current premises across the road, with part remaining in Council ownership for a potential future gym facility. Phase 3 has planning permission for the relocation of the Duke Street post office.



5. Denny Accessibility

Denny Town Centre is at the convergence of several routes and so, in theory, is easy to access from its catchment area. However, in terms of vehicular access, congestion at Denny Cross is a significant problem. As noted previously, the Council is taking forward the construction of the remaining phases of the Denny Eastern Access Road, which should ease congestion to some degree. The Town Centre is served by a number of bus services linking the town with Bonnybridge, Falkirk, Stirling and Cumbernauld.

Denny has an adequate level of free parking. The 2007 parking survey indicated a capacity of 400 spaces, with peak occupancy on Friday 327 vehicles, and on Saturday 226 vehicles. The main off street car parks are at Davies Row (which has been improved as part of the Phase 1 regeneration works), Carronbank House, and the Co-op.

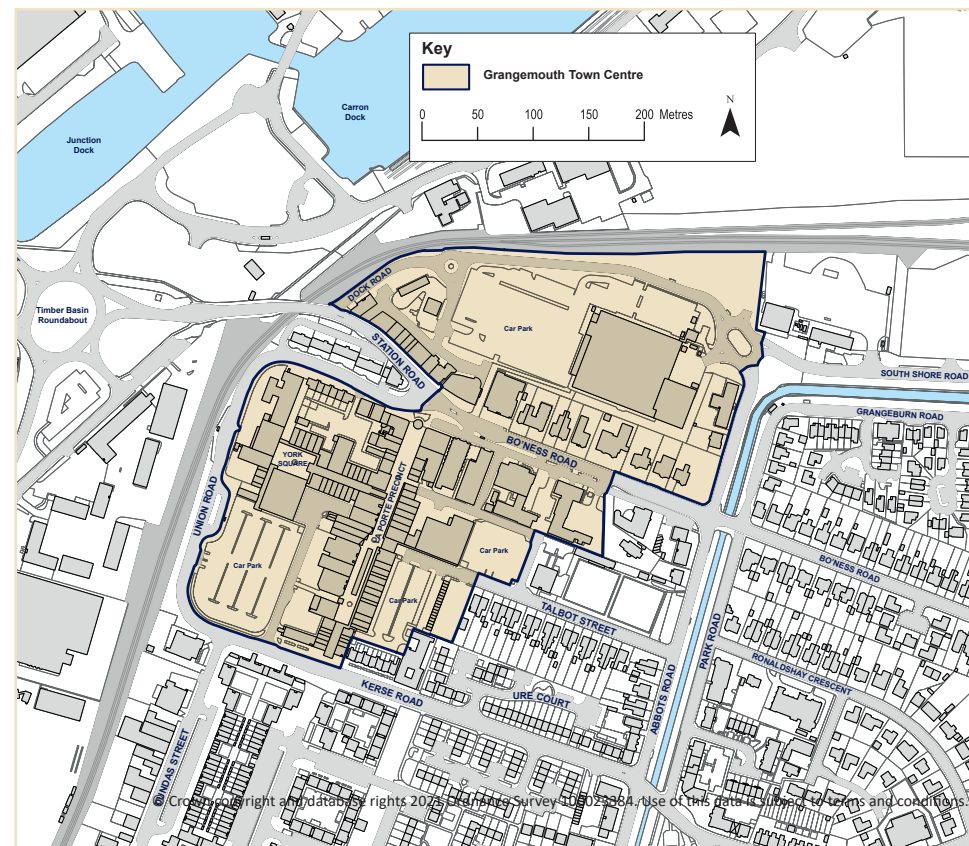
Summary

- The Town Centre continues to fulfil an important convenience shopping function, although only a minority of residents do their main shopping there;
- The comparison sector, though small, has seen an increase in floorspace and number of units since the previous survey in 2019;
- There is a good range of services provided within the centre, which has been further enhanced by the conversion of Carronbank House into the west locality advice and support hub. The number of service units has increased in the centre, and face to face banking is now available in the Co-op Food store after a three year absence of banking facilities in the town;
- Vacancy levels are low at 7% of floorspace and 5% of all units. This is despite the impacts of Covid-19 on local businesses;
- Phase 1 of the Town Centre's redevelopment has provided a new library, modern shop units and a new public square which has enhanced the character and appearance of the centre. Phases 2 and 3 are attracting interest for commercial use;
- Vehicular accessibility to the Town Centre is hampered by congestion at Denny Cross, but this should be addressed by the Denny Eastern Access Road.

6. Grangemouth Overview

Grangemouth has a population of 16,240 and is characterised by its large port and concentration of chemical and petrochemical industries. The Town Centre comprises a 1970s precinct which was refurbished in the 1990s; the traditional civic buildings along Bo'ness Road; and the Asda store to the north behind the town hall which was built in 2006. The population of the town is in decline, with limited opportunities for housing growth due to physical constraints such as the M8 and the River Carron and restrictions imposed by the major hazard sites as well as a limited range of potential sites. Flood risk is also a major issue. However, Grangemouth is now a key focus of attention in terms of the Scottish Government's aspirations for a just transition to a zero carbon economy, and a target for investment through Council's Investment Zone Growth Deal which will include consideration of the future of the Town Centre.

Map 7 : Grangemouth Town Centre



6. Grangemouth Activities and Uses

Figure 16: Grangemouth Town Centre Floorspace Survey 1996-2021

Year	Convenience Floorspace	Comparison Floorspace	Service Floorspace	Vacant Floorspace	Total Floorspace	Conv Units	Comp Units	Service Units	Vacant Units	Total Units
1996	4,420 m ²	5,010 m ²				16	41	36	7	100
2004	3,341 m ²	5,432 m ²	4,631 m ²	735 m ²	14,139 m ²	10	34	36	10	90
2009	9,350 m ²	4,522 m ²	4,292 m ²	2,017 m ²	20,181 m ²	10	23	37	24	94
2014	9,978 m ²	4,348 m ²	6,108 m ²	1,016 m ²	21,450 m ²	14	24	49	13	100
2019	7,756 m ²	5,343 m ²	4,791 m ²	2,821 m ²	20,711 m ²	13	19	45	24	101
2021	7,408 m ²	4,313 m ²	4,040 m ²	2,262 m ²	18,022 m ²	10	19	44	29	102

There is a significant overall reduction of 2689m² in the floorspace recorded in the 2021 survey compared with 2019. However, there has been no reduction in the number of units in the Town Centre, with the difference accounted for by the removal of upper floors and basement storage in a number of units, which were previously included in error, and other corrections to floorspace figures.

Convenience retailing makes up 41% of the total floorspace, with the large Asda store continuing to provide main food shopping provision for the town alongside Farmfoods and Iceland. The overall number of comparison units has remained the same, although the amount of comparison floorspace has reduced due to corrections in some unit floorspaces mentioned previously. The larger units in the Town Centre are predominantly well known high street retailers such as Specsavers, Lloyds Pharmacy and Boots, but there is a high percentage of independent businesses in the smaller units, the majority of which have been trading since the last survey in 2019.

Services make up some 22% of total floorspace, with a range of services operating such as solicitors, bookmakers, hair and beauty providers and hot food takeaways. The most significant change is the closure of Lloyds Bank, leaving Bank of Scotland as the only bank in the town. Whilst nine service units closed, this is offset by eight new service uses and a unit subdivision. New service uses opening in the town including an expansion of the Citizen's Advice office and three new educational and training services. Some of the uses are, however, temporary while units are being marketed. The Town Centre retains several important civic and community functions including Council offices, library, town hall and police station.

The Town Centre has 24 flatted residential properties above units in La Porte Precinct and in York Square, and a number of flats on Union Road. The previously estimated population was just 91 people.



6. Grangemouth Environment

The 1970s shopping centre to the south of Bo'ness Road, comprising La Porte Precinct, York Arcade and York Square, is pedestrianised and, although subject to improvement in the 1990s, it retains a dated appearance.

Bo'ness Road has a number of attractive buildings including the town hall, the library, and the listed former La Scala cinema. This area forms part of the Victorian 'New Town' and is designated as an Area of Townscape Value. A recent character appraisal has highlighted the architectural and historic merit of this area, and the potential for future Conservation Area designation.

The Asda store is somewhat visually detached from the main Town Centre with the pedestrian connection via a narrow route alongside the town hall.

There is no greenspace in the Town Centre although there is a bowling club on Talbot Street, and Zetland Park, currently subject to a major regeneration project, is nearby.



Commercial Viability

In terms of the number of units, the vacancy rate is high at 28%, an increase from 24% in 2019. However, the percentage of vacant floorspace is more modest and has been fairly stable, currently sitting at 13%. Six larger units on La Porte Precinct and Talbot Street account for almost half of all vacant floorspace including two former bank buildings.

There is a recognition that there is an excess of retail floorspace in the Town Centre. Accordingly, the Council is proposing to demolish and redevelop the Kerse Road block at the southern end of La Porte Precinct. This comprises vacant offices and a number of vacant ground floor units which businesses have been progressively moved out of, effectively consolidating the retail core in a smaller area. Alternative uses for the site once it is cleared are under consideration. The proximity of major hazards, whose consultation zones impinge on the Town Centre, may constrain certain types of development.

The Retail and Leisure Statement prepared in 2019 for the Falkirk Gateway proposals estimates that the Town Centre retains 66.6% of local convenience expenditure, which is the highest of all the district centres. This is attributable to the scale of the Asda store. Arguably, because of the detached nature of the store from the rest of the Town Centre, the potential benefits of this are not fully realised.

The future of Grangemouth, including how its industries transition to net zero and how the town itself is regenerated, is the subject of substantial work at present involving Scottish Government through the Grangemouth Future Industries Board; the Council, with Grangemouth being a key focus for its Investment Zone Growth Deal; various regulatory bodies, who are setting up mechanisms for a more co-ordinated approach to environmental regulation in the town; and the community, who have embarked on a community action planning process with the Council. The Town Centre is a key part of this, and will feature in any future masterplan which is developed for the town through the Growth Deal work.

6. Grangemouth

Accessibility

Although not centrally located in relation to the main residential areas, the town's compactness and permeable street network mean that the Town Centre is relatively accessible by sustainable modes. Formal cycle routes are limited but given the town's flat topography, there is scope for development of a cycling network. In terms of car access, the Town Centre is well served with car parking at Union Road, Talbot Street and at Asda.

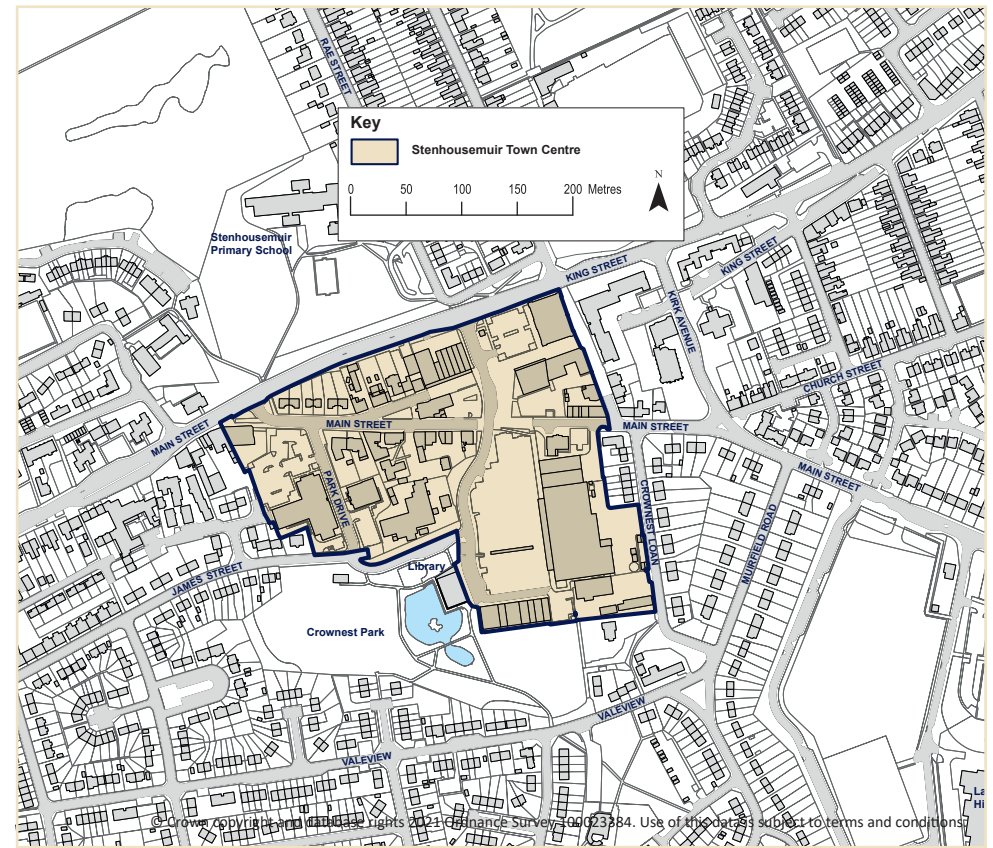
Summary

- The Town Centre continues to provides a good quality of convenience shopping, as evidenced by high expenditure retention, and a range of local services for local residents;
- The percentage of vacant units is high, and has increased since 2019, but the percentage of vacant floorspace is more modest and remains fairly stable;
- The 1970s precinct design is dated and would benefit from some remodelling, not least to reduce the oversupply of retail units - some early work on this is under consideration at the southern end of La Porte Precinct. Meanwhile, the traditional properties on Bo'ness Road are a townscape and heritage asset which should be valued;
- Town centre regeneration is clearly on the agenda as part of the wider focus on a just transition of the town to a net zero future.

7. Stenhousemuir Overview

Stenhousemuir Town Centre is a small district centre, which benefitted from a substantial £15m redevelopment in 2010. This restructuring provided a new 40,000 sq. ft. Asda foodstore, new non-food retail floorspace and a new library, health centre and civic space with public art. Part of the original precinct style centre remains, which is dated in appearance and separated from the new shopping environment by the main access road to the town centre.

Map 8 : Stenhousemuir Town Centre



7. Stenhousemuir

Activities and Uses

Figure 17: Stenhousemuir Town Centre Floorspace Survey 1996-2021

Year	Convenience Floorspace	Comparison Floorspace	Service Floorspace	Vacant Floorspace	Total Floorspace	Conv Units	Comp Units	Service Units	Vacant Units	Total Units
1996	1,919 m ²	1,870 m ²				10	20	22	3	55
2004	1,425 m ²	2,026 m ²	1,822 m ²	194 m ²	5,467 m ²	7	16	27	4	54
2009	4,417 m ²	1,332 m ²	2,247 m ²	2,985 m ²	10,981 m ²	8	10	23	6	47
2014	5,096 m ²	2,508 m ²	2,701 m ²	773 m ²	11,078 m ²	6	11	28	3	48
2019	5,137 m ²	1,593 m ²	3,159 m ²	1,227 m ²	11,116 m ²	6	11	29	4	50
2021	5,128 m ²	1,083 m ²	2,685 m ²	1,713 m ²	10,609 m ²	6	12	26	6	50

Convenience retail has remained stable and makes up almost 50% of the total floorspace of the Town Centre, with the anchor store of Asda providing the greater part of this. Comparison floorspace, which fell in the 2019 survey due to the relocation of B&M to a site outwith the centre, has further reduced due to the loss of the Pound Savers Home Store in the precinct, coupled with some individual adjustments in floorspace figures. Service floorspace and units have also seen a reduction, although they remain a very important part of the centre's function. They include hairdressers, hot food takeaways, and financial services. A leisure offer is provided by the gym operated by Falkirk Community Trust.

Within the Town Centre, apart from Asda, there are a number of national operators including Spar, Farmfoods, two Lloyds Pharmacies, Subway, Greggs, Card Factory, Ladbroke's and BetFred. Adjacent to the Town Centre, on the other side of Main Street, the former McCowan factory site has been developed for a larger B&M and Tim Horton restaurant and drive through.

The residential population of Stenhousemuir was estimated to be 82 in 2016 which is relatively low compared to other town centres.

7. Stenhousemuir Environment

The past redevelopment of Stenhousemuir opened up the shopping environment by creating a new access road and central pedestrianised public space area with seating and public art. The focus of this is two cast iron highland cows reflecting Stenhousemuir's history as a centre for cattle markets in the 18th century. However the integration of the new retail units with the original 1960s shopping precinct and shops on Main Street has not been as effective as it could have been which in part can be attributed to the new access road which bisects the Town Centre, creating a barrier between the old and new shopping areas.

Drydales Foundry continues to occupy a central site within Stenhousemuir. Whilst the foundry site is designated as 'Business Areas with Potential for Redevelopment' in LDP2, there are no known relocation plans by the company. The foundry is a significant presence visually and in terms of noise. Improved landscaping around its boundary would help screen the foundry more effectively than at present.

The town is benefiting from additional support via Falkirk Delivers on a number of business and environmental measures to support business resilience and improve the trading environment.



Commercial Viability

Vacancy rates have remained fairly low, with the 2021 floorspace survey recording just six vacant units, an increase of just two from 2019. The amount of vacant floorspace has also increased, principally due to the closure of Pound Savers Home Store. The large B&M unit remains vacant.

The Retail and Leisure Statement prepared to support the Falkirk Gateway proposals indicates that Stenhousemuir Town Centre retains 34.8% of local convenience expenditure. The rapid expansion of the urban area and the significant increase in population over recent years will continue to help sustain the centre.

7. Stenhousemuir

Accessibility

The Town Centre lies in the heart of the urban area, so is within walking distance of a large proportion of its catchment population. There are also various bus services serving Stenhousemuir. The remaining precinct part of the Town Centre has a pedestrianised area. A zebra crossing links this area with the new retail units.

Summary

- The overall perception of Stenhousemuir is of a stable town centre, with a strong convenience offer and a good range of services;
- The physical environment of new and old shopping areas do not integrate particularly well;
- Vacancy rates are fairly low, although the large B&M unit within the redeveloped centre remains unoccupied;
- The centre enjoys good accessibility to a large catchment population.





Falkirk Council
Development Services