Halcrow Group Limited

West Lothian Retail Capacity Study

Final Report

November 2008

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Contents Amendment Record

This report has been issued and amended as follows:

Issue	Revision	Description	Date	Signed
1		Stage 1 Report	28/7/08	IP
2		Stage 2 Report (Chapter 6)	25/9/08	IP
3		Final Draft Report	24/10/08	IP
4		Final Report	20/11/08	IP
5		Final Report with Comments	1/12/08	IP

Contents

1 Introduction and Methodology

1.1 *Introduction*

Halcrow were commissioned to conduct the West Lothian Retail Capacity Study (WLC RCS), focussing on convenience retail capacity, on 30 June 2008. This report is the draft final report.

The RCS has a series of stages:

- **Stage 1** – Research and Mapping;
- **Stage 2 –** Qualitative Retail Appraisal and Retail Capacity Modelling;
- **Stage 3** – Accessibility and Site Appraisal;
- **Stage 4 –** Conclusions and Recommendations.

The requirement for the study was as follows:

The Retail Capacity Assessment of West Lothian must provide the following:

- *A general market overview;*
- *An analysis of expenditure patterns for convenience shopping in West Lothian;*
- *A delineation of West Lothian's retail catchment area for shopping;*
- *Analysis of the West Lothian population in relation to their level of available expenditure within the retail catchment area;*
- *Analysis of the leakage into and out of West Lothian and between settlements and reasonable aspirations for clawback having regard to the hierarchy identified [Almondvale, Bathgate, Linlithgow, Armadale, Whitburn and Broxburn/Uphall];*
- *An assessment of the adequacy of retail provision within West Lothian, for convenience shopping, as estimated for the present day position and taking into account allocations within the local plan for 24,000 new houses and the council's housing model which phases development to 2026;*
- *Capacity analysis: - any additional floorspace requirements identified should be broken down by floorspace;*
- *An assessment of potential locations within West Lothian for any significant new convenience floorspace provision that the study may identify. Having regard to the scale of any retail*

deficit identified, the report will provide a actual assessment of each location against the criteria contained in SPP8, approved Edinburgh and the Lothians Structure Plan 2015, policies Adopted Bathgate, Broxburn, Calders, Linlithgow and Livingston Local Plans and the West Lothian Local Plan (as amended 2008).

- *A factual assessment of the physical capacity of each location to accommodate a specified size of convenience retail use, how the location will be accessed and its relationship to its catchment area, including pedestrian and public transport accessibility;*
- *A clear methodology and justification for the report's conclusions and recommendations.*

1.2 Methodology - Stage 1

The main tasks from Stage 1 were as follows:

- Setting out the **Policy Context** – primarily SPP8, the Edinburgh and the Lothians Structure Plan, and the West Lothian Local Plan (as amended, November 2008). ***Chapter 2.***

- Providing a **General Market Overview** – economic, demographic, socioeconomic, tourism and retailing overview. ***Chapter 3.***

- Mapping and **Catchment Definition** – based on existing and proposed centres using drive time to supermarkets to help define catchments. ***Chapter 4.***

- Household shopping patterns **Survey Work** – telephone survey conducted by NEMS Market Research. ***Chapter 5.***

1.3 Methodology - Stage 2

Stage 2 focussed on qualitative and quantitative retail issues.

Firstly, a **qualitative retail assessment** and **town centre assessment** was conducted to identify general retail and town centre issues, and to inform the final conclusions and recommendations following consideration of the quantitative retail position. ***Chapters 6 and 7.***

Secondly, a **Retail Capacity** analysis exercise was undertaken to define the quantitative retail position, both for the base year of 2008 and for future years until 2026. The catchments defined in Stage 1 were used as the basis to map population (by postcode sector) and floorspace (supplied by West Lothian Council) using financial data (per capita spend and turnover rates) to calculate available expenditure and turnover. Survey responses were applied to the data to reflect expenditure flows and shopping patterns and this was projected forward using expenditure growth projections, future consented floorspace, and future population from allocated housing sites phased until 2026. Four scenarios with varying targets for retained expenditure within catchments were devised and sensitivity testing based on a low growth scenario was conducted, to allow projected capacity and approximate floorspace to be calculated for future years. ***Chapter 8.***

1.4 *Methodology - Stage 3*

The main task from Stage 3 was the **Accessibility and Site Appraisal** – examining the accessibility at a catchment level and of specific sites, based on meeting identified capacity in accordance with applicable policy. ***Chapter 9.***

1.5 *Methodology – Stage 4*

The final part of the Study was to bring together the findings into a number of **Conclusions and Recommendations**. ***Chapter 10.***

2 Policy Context

2.1 National Retail Policy

2.1.1 SPP 8

National retail policy is underpinned by SPP 8 – Town Centres and Retailing. SPP 8 has a number of policy objectives relating to retailing as specifically related to town centre. SPP 8 is thus concerned with the appropriateness of land use and not with the wider retail market or issues of competition, although this focus may change slightly following the review of retailing by the Competition Commission.

2.1.2 SPP 8 Objectives and Principles

SPP 8 is underpinned by a series of high-level objectives, summarised below:

- *Promote distinct, competitive places and encourage regeneration, in order to create town centres that are attractive to investors and suited to the generation of new employment opportunities. This means identifying the most appropriate location for retailing and other related activities.*

- *Create a climate that enables all sectors of the community to have access to a wide choice of shopping, leisure and other services and for gaps and deficiencies in provision to be remedied. This means supporting an efficient, competitive and innovative retail and leisure sector which meets the needs of the entire community. It does not mean using the planning system to protect the competitive interests of individual retailers or other businesses.*

- *Improve the physical quality and sustainability of our town centre environments. This means promoting good quality design, protecting and enhancing existing quality, supporting the creation of town centres which are safe, inclusive and attractive for everyone and which promote sustainable management of water and energy.*

- *Support development in existing accessible locations or in locations where accessibility can be improved. This means encouraging developments that are accessible to all, reduce the need to travel and provide alternatives to car use by being served by a choice of modes of transport.*

Following from the principles defined in SPP8 are a series of focussed policy principles, summarised below:

- *Identifying and promoting town centres as part of a network of centres,*

- *Focusing development in existing town centres by using a sequential approach to development,*

- *Maintaining, improving and developing town centres,*

- *Promoting a safe and attractive environment,*

- *Ensuring that centres are accessible to all sectors of the community,*

- *Regularly monitoring and reviewing their policies.*

2.1.3 *The Sequential Approach*

The sequential approach to development is central to the town centre focus of SPP8 which states that (para 16) "*application of the sequential approach requires flexibility and realism from planning authorities, developers, owners and occupiers to ensure that different types of retailing, which serve different purposes, are developed in the most appropriate location.*" Locations are defined as:

- *Town centre – retail core of primary and secondary shopping areas;*

- *Edge of centre – typically within walking distance of the primary shopping area;*

- *Other commercial centres – focussed on retail and/or leisure, complementing the role of other centres;*

- *Out of centre – only appropriate when potential options in the above centres have been exhausted, the development is appropriate in terms of scale, and there will be no significant impact on existing centres in terms of vitality and viability.*

2.1.4 *Vitality and Viability*

Vitality is a measure of how lively and busy a town centre is, and viability is a measure of its capacity to attract ongoing investment, for maintenance, improvement and adaptation to changing needs. A range of indicators is suggested in SPP 8, listed below:

- *Pedestrian flow (footfall) measures the numbers and movement of people on the streets. Counts should be collected on a consistent basis over a period of time, at different locations and times.*

- *Prime rental values provide a measure of the relative position of locations or streets within a centre and give an indication of retailer desire to locate within an area.*

- *Space in use for different town centre functions and how it has changed.*
- *Retailer representation and intentions: national multiples and independents.*
- *Commercial yield. Although a valuable indicator of retail viability, it needs to be used with care as, in part, it reflects a developer's, rather than a retailer's, interest in locating in an area.*
- *Vacancy rates, particularly street level vacancy in prime retail areas.*
- *Physical structure of the centre, including opportunities and constraints, and its accessibility.*
- *Periodic surveys of consumers.*
- *Crime – co-operation with the local police; Architectural Liaison Service can assist in identifying persistent or potential problems in an area.*

Town centres have been appraised in qualitative terms, informed by the list above, although no analysis has been conducted of quantitative measures such as footfall, rentals or yields.

2.1.5 *Determining Applications and Retail Impact*

SPP 8 (para 38) states that "*all planning applications should be rigorously assessed against the development plan and the policy set out in this SPP. The assessment should be applied to all new development, redevelopment or extensions to existing facilities, changes of use, renewal of planning permission and applications to vary or remove existing planning conditions concerned with the scale and or character of the development*." In particular, the proposal should be of high design quality and at an appropriate scale for its location and the location should be conveniently and safely accessible to all sectors of the community.

For proposed developments not consistent with the Development Plan, additional requirements are stipulated:

- *A sequential approach to site selection has been used;*
- *There is no unacceptable individual or cumulative impact on the vitality and viability of the network of centres identified in the development plan;*
- *The proposal will help to meet qualitative and quantitative deficiencies identified in the development plan; and*

- *The proposal does not conflict with other significant objectives of the development plan or community planning strategies.*

In addition, there is the requirement for an impact analysis (also known as a Retail Assessment) for proposals in excess of 2,500 sq m gross floorspace (ie. sales and non-sales). These Retail Assessments will be prepared in support of the planning application for consideration by the Planning Authority and follow a broad methodology. They should be informed by the Retail Capacity Study for a local authority area (such as the output of this study) but a Retail Capacity Study is not a substitute for a Retail Assessment, which will focus on a narrower catchment area for foodstores in particular.

Finally, there is the requirement to notify Scottish Ministers for proposals which are to be approved in excess of 10,000 sq m gross floorspace, for proposals which may impact on another local authority area and to which the authority has objected, and for proposals which are considered to be a significant departure from the Development Plan.

The principles of SPP 8 should be taken forward into the Development Plan and any Supplementary Guidance, details of which are below in the following paragraphs.

In summary, SPP8 requires Planning Authorities to have regard to the effect on Town Centres of any proposed retail development, particularly any large development that is not in an established existing Town Centre, to ensure that it would not undermine vitality and viability, however, they must also plan to meet the shopping needs of the whole community. Therefore the Planning Authority is relying on this study to identify need or opportunity in terms of the quantum and location of new convenience floorspace and to recommend preferred development sites that would meet the SPP8 and other policy tests.

2.2 The Development Plan

2.2.1 Structure Plan

The *Edinburgh and the Lothians Structure Plan 201*5 is the strategic component of the development plan; this is due to be replaced by 2012. This replacement plan will include at least part of West Lothian.

2.2.2 Structure Plan Policies

The aim of the Structure Plan policies is summarised as follows:

- *ensure that the population of Edinburgh and the Lothians has access to a full range of high quality shopping facilities, minimising the need to travel, and maximising the benefits to the local economy;*
- *secure an equitable, accessible and sustainable distribution of shopping facilities, with new development focused wherever possible in recognised town centre locations;*
- *promote investment that will increase the vitality and viability of town centres, through improvements to environmental quality, amenity, accessibility, marketing and the range and quality of retailing and other facilities;*
- *consolidate and strengthen the role of Edinburgh City Centre as a prime leisure shopping destination of national importance, and as the principal destination for comparison shopping in the east of Scotland;*
- *restrain further development of retail parks or other out-of-centre sites, unless there are recognised deficiencies and no opportunities to remedy them within town centres.*

These policies relate to both food and non-food retail, and this study is concerned with food retailing and general policies.

2.2.3 *Identified Town Centres*

The following locations are identified as town centres in Schedule 6.1. This principle is followed in the approach of this study, which includes East Calder (current) and Winchburgh (future) as identified centres.

- Almondvale (Livingston) (sub-regional centre);
- Bathgate;
- Linlithgow;
- Armadale;
- Whitburn;
- Broxburn/Uphall.

The identified centres form the centre of the catchments used in this study and will be the focus for development in accordance with the sequential test. Supporting paragraph 6.7 and policies RET 1 and RET 2 are also clear that other established accessible shopping locations and existing or planned urban areas (as defined in a local plan) will follow sequentially from town centre and edge-of-centre.

The vitality and viability of existing town centres are also to be protected from any significant individual or cumulative impact arising from edge-of-centre or out-of-centre new development. Furthermore, any development that is out-of-centre or in an urban area must meet an identified qualitative or quantitative deficiency and be of an appropriate scale to address this, and must be accessible, in particular to public transport and cycling/walking.

Policy RET 5 requires that local authorities use local plans and other initiatives to ensure that:

- *Boundaries are defined for town centres and shopping centres;*
- *Town centre strengths, weaknesses, vitality and viability are reviewed;*
- *Specified centres have defined roles;*
- *Large format stores are integrated sympathetically into the townscape;*
- *The adequacy of local shopping facilities is assessed, protected and deficiencies remedied as appropriate;*
- *Provision is made for new shopping facilities as appropriate, particularly in areas of planned growth.*

The last two points of this policy provide the context for this study.

2.2.4 *Structure Plan Housing Requirement*

The Structure Plan sets out the strategic housing requirement to 2015, based upon three Core Development Areas at Armadale, Livingston and Winchburgh/ Broxburn/ Uphall. These areas have a total minimum requirement of 7,000 units within the plan period and the more precise figures are considered in the review of Local Plan strategy and housing policies, later in this chapter.

2.2.5 *Local Plan*

The West Lothian Local Plan (as amended November 2008) is the Local Plan. This plan replaces a number of local plans with a single West Lothian wide plan, and will be the baseline for this study. The Local Plan reiterates Structure Plan policies RET 1, RET 2 and RET 5 and has the following aim:

- *secure the progress of the Almondvale Town Centre, Livingston's town centre, towards achieving full potential as a sub-regional centre, by promoting retail, business, educational, leisure and entertainment uses;*

- *strengthen and enhance Bathgate Town Centre as the district centre;*

- *sustain the vitality of local neighbourhood centres and encourage retail and community facilities commensurate with their status;*

- *resist retail development outwith Livingston, Bathgate and the other centres identified in the structure plan, and shown on the proposals maps, where these would detrimentally affect the identified town centres.*

The Local Plan also reiterates the sequential requirements of the Structure Plan.

2.2.6 *Local Plan – Almondvale (Livingston)*

The focus of this study is on convenience retailing, although it should be stated that Almondvale (Livingston) in particular is a major comparison shopping destination, drawing in spend from both Edinburgh and Glasgow, in particular because of the well-known Designer Outlet Centre, nearby shopping malls and other nearby retail parks. Almondvale is a sub-regional centre that draws in comparison spend from beyond West Lothian because of the abundant free car parking conveniently co-located with McArthur Glen Outlet Centre and a large concentration of National Multiple Retailers. There is an acknowledgment that there is a lack of housing in the centre of Livingston and an opportunity for mixed use and higher density developments. In terms of convenience retailing, expenditure levels and local economic expansion are forecast by the Local Plan and retail proposals will be evaluated against:

- *Integration within the existing core;*

- *The delivery of a range of town centre facilities and uses, encouraging mixed use and higher density development;*

- *The promotion of sustainable transport initiatives that minimise congestion.*

In particular, a new civic centre in Livingston is being promoted, and there is a presumption in favour of major retail and other developments within the boundary of Almondvale town centre (policies TC2 and TC3) subject to the safeguarding of the civic centre site, high standards of design and the minimisation and rationalisation of car use (policies TC4 to TC6).

2.2.7 *Local Plan – Bathgate (District Town Centre)*

The Local Plan states that Bathgate Town Centre is an asset of considerable importance to West Lothian, as the district centre for convenience shopping in the western half of the district, but with a traditional character and a supply of smaller, affordable premises which provide the potential to complement Livingston in providing specialist shopping services. Some improvements of the shopping core have been carried out (with an action plan for the town centre) and a retail park at Whitburn Road and a foodstore at Blackburn Road have been opened and recently extended respectively. The need to consider future retail proposals (and other land uses) against the vitality and viability of the town centre is stressed.

The town centre has few potential suitable development sites, other than the possible relocation of the Foundry at Whitburn Road, which would provide an opportunity mixed-use site for a supermarket and housing, improving linkages between the town centre and housing. The town centre boundary has been extended to encompass this area and further sites along the Edinburgh Road in anticipation of the relocation of the rail station following the re-opening of the Bathgate-Airdrie rail line.

Policy TC7 promotes retail and other development, including higher density housing, in (and on the edge of) Bathgate town centre, with proposals outwith the town centre that would prejudice its district status to be resisted. The architectural quality of the town is recognised, with the requirement for quality design stated in the Local Plan and reinforced in policy TC8.

2.2.8 *Local Plan – Other Growth Areas and Neighbourhoods*

Bathgate is identified as one of a number of significant growth areas which also include:

- Armadale (limited town centre opportunities);
- Broxburn (limited town centre opportunities);
- Whitburn (limited town centre opportunities);
- Winchburgh and west Livingston;
- East Calder.

Almondvale (Livingston), Armadale, Bathgate, Broxburn, East Calder, West Calder and Whitburn are identified as nearby town centres which can serve these growth areas, although the Local Plan states that neighbourhood centres with local shopping should be included within development areas. Broxburn, Whitburn and Armadale are viewed as offering limited development opportunities within town centres, with possible justification for development outwith the town centre boundaries. In such instances, where local expenditure growth would support additional retail floorspace, any such retail proposals will be assessed against, and must fully satisfy, the sequential testing and other requirements of the development plan and national policy. The derelict site at Candleworks, Broxburn, is identified as one possible site with retail potential use that should be considered.

Winchburgh and East Calder are identified as small neighbourhood centres with limited existing retail choice and range. Winchburgh is seen as offering potential for a new town centre as part of the Core Development Area proposal.

The provision of further retail floorspace in Whitburn, Broxburn and Armadale town centres is supported by policy TC 9, commensurate with expanding populations generated by major developments, with floorspace outwith the town centres assessed on a sequential basis.

Policies TC10 and TC11 supports new local neighbourhood centres in East Calder and Winchburgh where is demonstrate that there are no adequate opportunities within the existing local neighbourhood centres; where the new provision is integrated within the development, whilst also serving the existing local communities, by means of offering good accessibility; and where the new provision is promoted within an overall strategy (ie. through masterplanning and town centre action planning linked to Core Development Areas) that demonstrates support to the existing local neighbourhood centre, which could include redevelopment proposals. Development at Winchburgh should be commensurate in scale to serve the Core Development Area population and is stated within the context of a new town centre within the existing village centre.

Retail provision in other centres within West Lothian is scrutinised within the context of increased consumer choice and mobility, and the Local Plan states there is an oversupply of small retail units with scope for consolidation around viable shopping cores, along with the enhancement of local neighbourhood centres.

- Linlithgow is assessed as having adequate provision to meet local convenience shopping needs.

- The upgrade of Union Square in West Calder offers an enhanced and more attractive shopping precinct.

- The refurbishment of Blackburn's shopping mall offers scope for regeneration of the centre and town with further opportunities to the east of the town centre.

- New housing allocations at Armadale will support local specialised and convenience shopping.

Convenience shopping within walking/cycling distance of residential areas is encouraged along with safeguarded sites for corner shops with pedestrian linkages, and expanded or new local neighbourhood centres around Livingston serving new housing districts and centres.

Policies TC12 and TC13 underpin the approach taken in the Local Plan, supporting retail proposals within identified town centre boundaries that are commensurate with the catchment areas, but not normally outwith town centres or in existing and proposed local neighbourhood centres unless serving only local or neighbourhood uses.

2.2.9 *Local Plan – Housing Allocations*

The Local Plan (Appendix 6.1, October 2008) identifies a housing supply of 23,456 units[1], primarily in the three Core Development Areas, with new allocations broken down as follows:

- Core Development Areas: approximately 12,000 units in total including:
    - Armadale: 2,000 units
    - Broxburn: 1,550 units
    - East Calder: 2,800 units
    - Livingston: 2,200 units
    - Winchburgh: 3,450 units

- Established Land Supply: 5,988 units

[1] See Chapter 8: the earlier Housing Land Audit 2007 identified a remaining housing land supply of 24,145, a difference of 689 units. The Housing Land Audit 2007 and model is used as the basis for forecasting and capacity estimates may thus be slightly higher than using the updated Appendix 6.1.

- New Allocations: 2,776 units including:
    - Whitburn: 1,970 units
- Other units with planning support: 205 units
- Expected completions on sites under construction: 2,487 units

The land supply is considered later on in more detail in forecasting the demand for retail expenditure, placing the housing land allocations in the defined catchments over the study period linked to expenditure estimates and forecast growth estimates. The Housing Land Audit 2007 provides the data for this forecast, and there may be a small discrepancy between this audit and the summary above due to completions in the intervening period.

2.3 *Conclusion*

SPP 8 and the Development Plan set out the policy at the national and local levels, although it should be noted that there is no Supplementary Planning Guidance for retailing within West Lothian, and consideration should be given as to whether this is appropriate, either at the local authority level or following from the future Edinburgh City Region Strategic Development Plan.

This review of policy should be viewed within the context of retailing within West Lothian as a whole but in particular with regard to existing and planned town centres and local neighbourhood centres. The policies supporting the main existing and planned sub-regional, district and other centres are summarised below.

- Almondvale (Livingston). Identified as the sub-regional centre, with further civic development planned in the centre itself and scope for further mixed-use and housing development (2,200 units). The principle of retail development within the town centre is supported, subject to various criteria including integration with the core and a reduction and consolidation of car use.
- Bathgate. The district centre for West Lothian, with an associated town centre action plan. Few sites are available within the town centre, although the boundary has been extended to allow the possibility of the relocation of the Whitburn Road foundry and the development of this opportunity site. Retail proposals must consider the vitality and viability of the town centre. Upgrades

and refurbishments in Blackburn and West Calder have been carried out, with opportunities to the east of Blackburn in particular.

- Armadale. Limited town centre opportunities although new housing allocations (up to 2,070 units) at Armadale will support local specialised and convenience shopping.

- Broxburn. Limited town centre opportunities although expanding populations (up to 2,050 units) may support further retail floorspace. The derelict Candleworks site may have retail potential.

- East Calder. A small neighbourhood centre with limited existing retail choice and range. The principle of a new local neighbourhood centre is supported where it can be demonstrated that there are no adequate opportunities within the existing local neighbourhood centre. The allocation of future housing land (up to 2,800 units) will increase the scope for floorspace.

- Linlithgow. Assessed as having adequate convenience floorspace to meet local need.

- Whitburn. Limited town centre opportunities although expanding populations may support further retail floorspace.

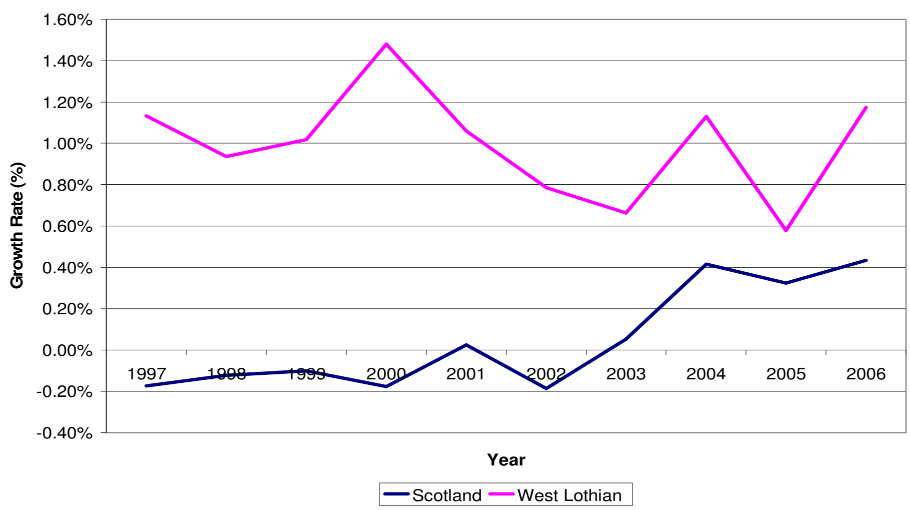
- Winchburgh. A small neighbourhood centre with limited existing retail choice and range. Earmarked for a new town centre to support the Core Development Area (up to 3,450 units) with commensurate retail floorspace.

3 General Market Overview

3.1 Population Context

3.1.1 The latest population estimate (mid 2006) for West Lothian is 165700, this compares with 163780 in the mid 2005 estimates. Figure 3.1 below illustrates population growth in Scotland compared to West Lothian over the period 1996-2006. The graph illustrates that West Lothian recorded positive population growth over the period; however some years witnessed stronger growth than others. In the latest period 2005-2006, the population of West Lothian grew 1.2 per cent compared to 0.4 per cent in Scotland.

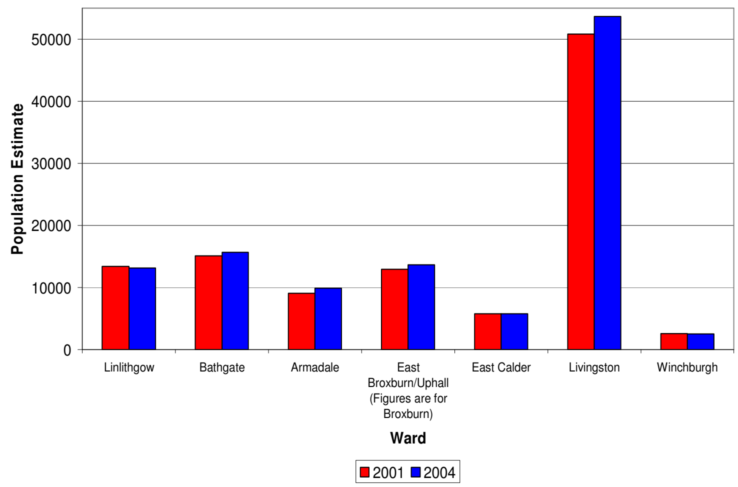
Figure 3.1: Population Growth, Scotland v West Lothian, 1996-2006



Source: General Register Office for Scotland, 2007

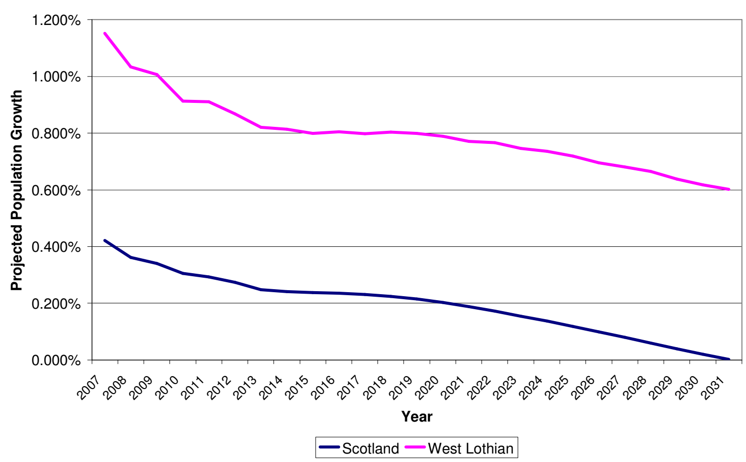
3.1.2 Figure 3.2 below shows the population for selected wards in West Lothian in 2001 and 2004 (latest data); these include Linlithgow, Bathgate, Armadale, Broxburn, East Calder, Livingston and Winchburgh. These wards were chosen as they have been identified as the core development areas in West Lothian. The graph illustrates that in Bathgate, Armadale, Broxburn and Livingston the population increased between 2001-2004, however in Linlithgow, East Calder and Winchburgh the population decreased between 2001 and 2004.

Figure 3.2: Population estimates for selected Wards in West Lothian, 2001 and 2004



Source: General Register Office for Scotland, 2006

Figure 3.3: Projected Population Growth, Scotland v West Lothian, 2006-2031



Source: General Register Office for Scotland, 2007

3.1.3 Figure 3.3 above illustrates projected population growth for West Lothian compared to Scotland 1996-2006. The graph illustrates that the population of West Lothian will continue to grow but at a decreasing rate ie. a declining rate of growth rather than a declining population.

3.1.4 Table 3.1 below illustrates the population of West Lothian and Scotland in 2006 and the projected changes over time. In 2006 the majority of the population in West Lothian and Scotland are of working age; however by 2031 West Lothian will have a higher proportion of individuals above working age (albeit still outnumbered by those of working age), a trend that will also be observed at the Scotland level.

Table 3.1: Scottish population by age, 2006 and projected changes over time

Population	West Lothian		Scotland	
	No. (000s)	%	No. (000s)	%
Total population	**166**	**100%**	**5,117**	**100%**
Below working age	35	21%	922	18%
Of working age	106	64%	3,213	63%
Above working age	25	15%	983	19%
Changes in population	diff since '01	diff to 2031*	diff since '01	diff to 2031*
Total population	**4%**	**22%**	**1%**	**5%**
Below working age	-1%	11%	-5%	-7%
Of working age	4%	17%	2%	0%
Above working age	14%	58%	4%	31%
** Takes into account change in state pension age*				

Source: Scottish Government, 2008

3.2 *Economic Context*

3.2.1 Table 3.2 below presents key economic statistics for West Lothian compared to Scotland.

Table 3.2: Comparison of Key economic statistics, 2004

	Scotland	West Lothian
GVA (2004) (£m)	78,504	2,624
GVA per head (2004) (£)	15,523	16,112

Source: ONS, Regional Accounts, 2004

3.2.2 The latest data for 2004 indicates that West Lothian contributed £2,624 million to the Scottish Economy. GVA per head was £16,112 for West Lothian, which is higher than the Scottish average of £15,523.

3.2.3 Table 3.3 below illustrates how the industrial structure in West Lothian has changed over the period. The table illustrates that in 1999 manufacturing contributed £1037 million to the Scottish economy and by 2005 this figure had reduced to £634 million. Services increased from £667 million in 1999 to £2988 million in 2005. This was also a trend observed at the national level due to the decline in the Electrical and Instrument Engineering (E&IE) sector at the turn of the century.

Table 3.3: GVA by Industry in years 1999, 2002 & 2005

Industry/Sector	West Lothian			Scotland		
Industry	**1999**	**2002**	**2005**	**1999**	**2002**	**2005**
GVA at basic prices						
(£million)						
Construction	125	135	193	3,575	3,910	5,287
Manufacturing	1,037	523	634	11,437	11,468	11,357
Services*	667	1,950	2,988	22,481	29,543	36,238
GVA at basic prices	**1999**	**2002**	**2005**	**1999**	**2002**	**2005**
per employee (£)						
Construction	28,089	32,369	38,422	26,950	32,737	40,761
Manufacturing	66,484	41,252	50,877	36,494	43,593	49,590
Services*	22,781	55,368	79,056	21,159	25,526	29,747

* Services here excludes: Financial Intermediation, Public Administration and Health & Social Work

Source: Scottish Government, 2008

3.3 *Labour Market Context*

3.3.1 Table 3.4 below shows key labour market statistics for West Lothian compared to Scotland. The table shows that the working age population of West Lothian was estimated to be 64 per cent of the total population of the region. The employment rate between October 2006 and September 2007 was 78 per cent, above the Scottish average of 76 per cent. The economic activity rate was also higher than the Scottish average at 82 per cent. The unemployment rate in West Lothian was 4.9 per cent, slightly below the national average of 5 per cent.

Table 3.4: Key Labour Market Statistics for West Lothian

Category	West Lothian	Scotland
Working Age Population (2006 mid year estimates)	64%	63%
Employment Rate (Oct 2006- Sept 2007)	78%	76%
Economic Activity (Oct 2006 – Sept 2007)[2]	82%	80%
ILO Unemployment Rate (Oct 2006-Sept 2007)	4.9%	5.0%
Median Gross Weekly Earnings (April 2007) (£)	399.4	441
People of working age claiming incapacity benefits	7.4%	7.4%

Source: Scottish Government, 2008

3.3.2 Table 3.5 below shows the proportion and level of people in employment by occupation group. The majority of the population of West Lothian are employed as Managers and Senior Officials as well as in Administrative and Secretarial positions and Associate Professional and Technical positions. It should be noted that, although managers and senior officials are above the national average as a percentage, professional and managerial employees are lower than the national average and the majority of the workforce are in administrative, sales/customer service and manufacturing occupations. This is reflected in the major employers of West Lothian, including customer service and telephone sales centres and a variety of semiconductor, electronics and pharmaceutical manufacturers. The nature of employment in West Lothian is reflected in the fact that incomes are some 10% lower than the national average and the consequence of this is that per capita and household expenditure is also likely to be lower than average. Finally, the impact of the economic slowdown and, potentially a recession, on employment activity in West Lothian should be considered.

[2] *Notes: Economically Active refers to all those people in employment or actively seeking employment. The International Labour Organisation (ILO) definition of unemployment covers people who are: out of work, want a job, have actively sought work in the previous four weeks and are available to start work within the next fortnight; or are out of work and have accepted a job that they are waiting to start in the next fortnight. This is the preferred internationally comparable measure of unemployment.*

Table 3.5: Proportion of people in employment by occupational group, 2007

Category	West Lothian (%)	Scotland (%)
Managers and Senior Officials	14.1	13.1
Professional Occupations	10.9	13.1
Associate Professional and Technical	12.4	14.7
Administrative and Secretarial	12.9	11.3
Skilled Trades Occupations	10.4	11.3
Personal Service Occupations	8.8	9.1
Sales and Customer Service Occupations	9.4	8.3
Process, Plant and Machine operatives	9.8	7.3
Elementary Occupations	11.5	11.9
Total Employment	84,900	2,521,300

Source: ONS Annual Population Survey, 2007

3.4 *Socioeconomic Context*

3.4.1 *Deprivation Indicators*

The Scottish Index of Multiple Deprivation (SIMD) is a compilation of deprivation indicators by datazone, ranked according to degree of deprivation. Three of these indicators have been considered to provide further detail on the socioeconomic context of West Lothian and particular pockets of deprivation and affluence. These maps are all relative to other datazones throughout Scotland. It can be seen on the page opposite that there is a geographical disparity of deprivation and affluence, focussed in the following areas listed in table 3.6.

Table 3.6: Proportion of people in employment by occupational group, 2007

Relatively Affluent	Relatively Deprived
• Linlithgow and hinterland • Broxburn • Uphall • Dechmont • Parts of Bathgate • Livingston West • West Calder, Bellsquarry, Murieston	• Armadale/Blackridge • Livingston East • Blackburn • Whitburn • Parts of Bathgate • Polbeth • Addiewell •

Source: SNS 2006/Halcrow Group Ltd Mapping, 2008

This is significant in the later evaluation of retail qualitative and quantitative need of defined catchments, as the available expenditure will vary from one area to the next and areas with low health indicators may have limited means, opportunity or convenience to purchase fresh foodstuffs.

Figure 3.4: Income Deprivation

Source: Scottish Neighbourhood Statistics, 2006

High

Low

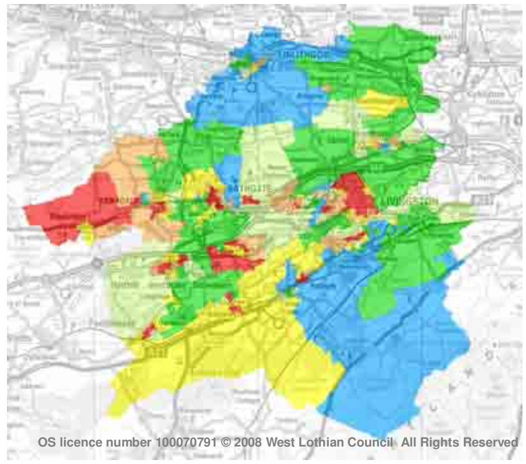


Figure 3.5: Employment Deprivation

Source: Scottish Neighbourhood Statistics, 2006

High

Low

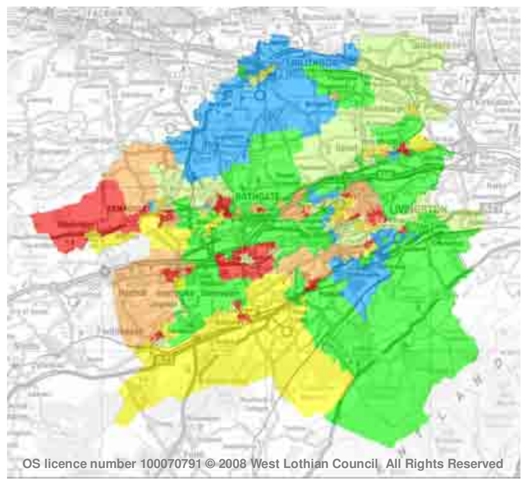
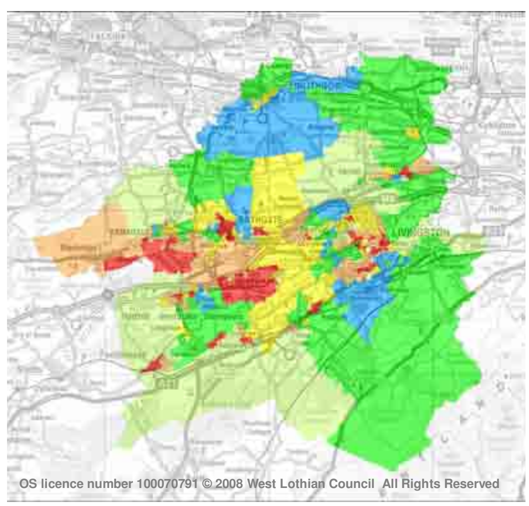


Figure 3.6: Health Deprivation

Source: Scottish Neighbourhood Statistics, 2006

High

Low



3.5 *Tourism Market Context*

The tourism market in West Lothian is the subject of the *Tourism in West Lothian Plan*, covering the period 2007 to 2010. The vision is to aspire for West Lothian to further develop as a tourist destination and achieve in excess of the national ambition of 50% growth in revenue from tourism within ten years, with a 5% annual growth in tourist numbers.

The review carried out in support of the Plan found that tourism had grown rapidly in West Lothian in recent years, with the *Edinburgh and Lothians Tourism Accommodation Audit (2006*) demonstrating a 65% growth in the number of serviced rooms in West Lothian over six years, with additional scope to meet demand from overnight visitors in Linlithgow. The most visited attractions from the *Visitor Attraction Monitor* produced by Glasgow Caledonian University were:

- Beecraigs Country Park (435,530)
- Polkemmet Country Park (286,200)
- Almondell & Calderwood Country Park (144,942)
- Almond Valley Heritage Centre (84,375)
- Linlithgow Palace (51,767)

In terms of linkages with retail expenditure, these attractions are all out-of-centre with the exception of Linlithgow Palace, although Beecraigs Country Park does contain camping and caravanning facilities.

The Plan considers the key strengths of West Lothian and these are:

- Heritage: There is already a wide offering in this area with many places of significant interest (e.g. Linlithgow Palace, Hopetoun House, Blackness Castle, Cairnpapple Hill). There is significant opportunity to attract visitors with interest in history; Mary Queen of Scots, genealogy, and historic buildings provided it is easily packaged for visitors.

- Shopping / Food: The Livingston Designer Outlet already attracts many day visitors to the area and there is potential in extending visits and in adding to the experience for existing overnight visitors. There is range of quality food and shopping available in the area and again this presents opportunity if easily packaged.

- Outdoors: It is clear from the visitor attractions monitor that West Lothian has strength in depth in outdoor products. In addition to the country parks and Almond Valley Heritage Centre there is a wide range of horse riding, wildlife, walking, and cycling in the area. West Lothian offers leisure visitors the opportunity to experience the outdoors whilst being in close proximity to both Edinburgh and Glasgow. The growth in green tourism offers potential for the area.

- Events and Festivals: West Lothian does not yet have a relative strength in Events and Festivals as drivers for tourism but it is recognised that Events and Festivals that play to the above strengths could have a very positive impact on the tourism sector.

From the point of view of linkages with retail expenditure, shopping provides the greatest direct link and Almondvale (Livingston) has key strengths in this regard. Heritage and Events/Festivals would offer key attractors that could encourage visitors into centres. Outdoor attractions are, by their nature, out-of-centre, although certain locations may be well-positioned to act as gateways in this regard.

It is important to be focussed on potential outcomes from this Plan which may be of benefit to the retail market sector which, by its nature, is focussed on town centres and commercial centres. Not all centres will be capable of benefitting so it is important to focus on these centres where benefit can be achieved. These centres are Almondvale (Livingston) and Linlithgow.

- Almondvale (Livingston) is evidently a popular shopping destination as an outlet centre, and the focus of commercial activity including the recent opening of further floorspace and a Marks and Spencer food hall. Almondvale (Livingston) is likely to continue to meet its visitor potential without the need for specific intervention, mainly benefitting through increased top-up and small-scale shopping trips by visitors, as significant expenditure is retained in Almondvale (Livingston) as it stands.

- Linlithgow has enormous heritage, shopping/food and cultural potential and this is recognised through the success of Linlithgow Palace as a visitor centre, the cultural events staged in Linlithgow (Celebrate Linlithgow, Linlithgow Folk Festival) and the proposal to integrate West Lothian's only tourist office, located in Linlithgow, as part of the Burgh Hall refurbishment programme. The excellent rail and road linkages to Linlithgow – with rapid train services to

Edinburgh and Glasgow – offer access to much of the Central Belt's population, and Linlithgow is a potential gateway to the many heritage facilities in the surrounding countryside. Realisation of Linlithgow's visitor attraction potential would drive public realm improvements and offer a wider range of leisure activities, enhancing the vitality of the town centre. This offers scope for increased top-up shopping trips by visitors, but also for reducing leakage by promoting linked shopping trips in Linlithgow.

It is recommended that any focus on linked tourism and retail opportunities and benefits focuses on Linlithgow and Almondvale with the aim of retaining expenditure and increasing top-up shopping trips. The remaining centres should not be neglected but it is important to provide a clear focus on attainable outcomes and benefits. Wider survey work in future retail and tourism studies may capture any such benefits.

3.6 Retail Market Context

3.6.1 General Economic and Retail Market

At of the end of March 2008 the Scottish retail sector employed 241,275 people, 10.1% of the national workforce. Scottish retail turnover was £21 billion, accounting for 12% of total Scottish turnover. [3] Food sales were up but non-food sales were down on the same time last year, with food like-for-like sales higher than the previous year, partly reflecting the growth in commodity prices.

In June overall annual shop price inflation was 2.5% in Scotland, a small increase from May's rate of 2.4%. Market analysts[4] had taken the view earlier this year that any talk of a recession was premature and that retail market growth can continue despite the "credit crunch" and housing market turmoil. However, it is now evident that the UK economy is entering recession and this has prompted substantial reductions in interest rates. Recent analysis by the Office of National Statistics[5] (ONS) and survey work by the Confederation of British Industry[6] (CBI) has found evidence of a slump in non-food sales – the sharpest decline since the 1980s – albeit with continued growth in the grocery sector.

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[3] SRC Scottish Retail Sales Monitor, June 2008.
[4] Mintel, Retail Rankings 2008, based on data and indicators from 2007.
[5] ONS monthly sales figures for June 2008, the decline perhaps exacerbated due to a surge in May (the view taken by the British Retail Consortium) but the steepest fall since records began for both food and non-food sectors.
[6] CBI Distributive Trade Survey (introduced in 1983), conducted over the period 25 June-16 July 2008, covering 153 firms.

Since June, it has become increasingly evident that there is an economic slowdown and the UK may be entering recession (two consecutive quarters of negative economic growth). This will impact further on the comparison goods sector, but the impact on the convenience sector is likely to be limited.

3.6.2 *The Grocery Sector*

The national economic and retail picture can be viewed as pessimistic with the apparent exception of the grocery sector, and detailed scrutiny is required of this sector in particular to gain an understanding of likely market trends even if continued (albeit slower) growth is likely. The most reliable source is *Retail Rankings,* published annually, although the specialist trade press and wider news media provide an up-to-date picture with regard to retailing. The grocery sector is the largest retail sector in the UK and one of the few to have seen consistent growth against total retail sales over the last decade. The market is broken down into the main retailers (also referred to as non-discount foodstores), discount foodstores (Aldi and Lidl), small local convenience stores and stores operated by co-operative societies (which have over 3,300 stores). Boundaries between convenience stores, superstores and co-operatives are viewed as increasingly blurred, reflected in the decision of Mintel to group these operators together in the most recent edition of Retail Rankings. Leading retailers continue to dominate, with the top 5 retailers accounting for 71% of the market in 2006, as shown in Table 3.7 below.

Table 3.7: Top 5 food retailers 2006

Retailer	Sales £M	Market share %
Tesco	27,112	28%
J Sainsbury	14,162	15%
ASDA	13,308	14%
Wm Morrison	10,094	10%
Somerfield	4,370	4%
TOTAL	69,047	71%

Source: Retail Rankings 2008

3.6.3 *The Main Retailers*

Tesco's dominance of the food retailing market continues, with 28% of market share in 2006 and the nearest three competitors occupying between 10% and 15% of the market. It should be noted that Marks and Spencer and Waitrose were slightly behind Somerfield, each with a market share of approximately 4%, so the dominant retailers are sometimes referred to as the "top 4". However the top 4 is shortly to be expanded into a credible "top 5" due to the Co-operative Group's acquisition of Somerfield and the consolidation of the co-operative society market with the recent merger of the Co-operative Group and United Co-operatives into a single group under "The Co-operative" brand.

Tesco's dominance is not without challenge, as ASDA is seeking to enhance the quality of its offer to broaden its appeal and to compete with Tesco. This trend is evident in the other non-discount grocers, all of whom offer some form of "quality" own brand label. The expected takeover of Sainsburys by private equity has not materialised, possibly due to the turmoil in the credit markets, and the company had better-than-expected results for 2007. The quality food (Waitrose, M&S) sector also continues to perform strongly although there is possible scope for downturn in this sector due to financial pressure on households.

Hard discounters have had mixed fortunes but may well benefit from the "credit crunch" as household expenditure is squeezed and the price of food increases,. However, the major retailers are likely to fight hard with competing price cuts and customer retention initiatives, so the benefit to this sector from the "credit crunch" should not be taken for granted.

3.6.4 *Convenience Store Retailing*

Smaller convenience store formats are benefiting from the declining trend amongst shoppers for planned main shopping trips and an increase in more spontaneous trips, and a possible resulting increase in greater frequency top-up shops. Store formats like Tesco Metro and Sainsbury's Local are increasing in popularity and are often served as satellites of larger stores, enabling a larger sales area through less warehouse space as the result of frequent deliveries from larger stores. This store format is often located at travel points such as fuel stations, and Marks and Spencer are a familiar site on many forecourts. Spar have also begun to target busy intersections. Consolidation and fragmentation have both been evident in the sector with Martin McColl acquiring Somerfield Essentials outlets and Budgens chain being sold off to franchisees.

3.6.5 *Specialist Food Stores*

Food specialists continue to struggle against the expansion of the grocer offer, although the decline in sales may be slowing and some sectors (bakeries in particular, benefiting from lunchtime passing trade) are resilient. Differentiated offer and the focus on the ethical, organic, local and fair trade markets provide opportunities but the major grocers are also expanding into these operations. Another approach taken by some specialists is to supply their products to the major grocers.

3.6.6 *Comparison Goods Retailing*

The main retailers continue to expand into the comparison goods market and the 2006 figures are shown below. The most recent expansion of comparison floorspace is led by ASDA in particular.

Table 3.8: Top 5 food retailers 2006

Operator	% Comparison Sales recorded
Tesco	**17%**
Sainsbury	**16%**
ASDA	**15%**
Wm Morrison	**19%**

Source: Retail Rankings 2008

3.6.7 *Competition Commission*

The Competition Commission has recently concluded an inquiry into supermarket retailing, and there will be an impact on food retailing and the planning process. In particular:

- A "competition test" is recommended for planning authorities in assessing applications for new stores, extensions and mezzanines, to prevent the emergence of areas of high concentration, with the Office of Fair Trading as a possible statutory consultee under the planning system. This would require changes to the planning systems in the UK.

- Release of restrictive covenants and limitation of exclusivity agreements;

- An Ombudsman to be appointed, in particular to deal with supply chain matters, and a new code of practice for major retailers (turnover in excess of £1bn) with retailers required to appoint compliance officers.

If implemented, these changes would be likely to make it easier for major retailers to expand into local areas where a rival is already based even if this increases overall market share. It should be noted that Tesco have launched a challenge to the competition test element of the proposals, with a court hearing scheduled for late 2008.

3.7 Conclusion

3.7.1 *Population and Socioeconomic Context*

West Lothian's population will continue to grow, albeit at a slower rate. The proportion of the population above working age will continue to grow, albeit not to the extent that it will overtake the working age population as the dominant group. GVA is slightly higher in West Lothian than in Scotland, with a slightly higher rate of employment and economic activity and a slightly lower rate of unemployment than the Scottish averages.

The labour market has more West Lothian employees in managerial/senior official, administrative, sales/customer service and manufacturing posts than for the Scottish average. This breakdown of employment may explain in part the fact that salaries are some 10% lower than the Scottish average.

3.7.2 *Tourism Market Context*

The tourism market in West Lothian is the subject of the *Tourism in West Lothian Plan*, covering the period 2007 to 2010. The vision is to aspire for West Lothian to further develop as a tourist destination and achieve in excess of the national ambition of 50% growth in revenue from tourism within ten years, with a 5% annual growth in tourist numbers. It is important to be focussed on potential outcomes from this Plan which may be of benefit to the retail market sector which, by its nature, is focussed on town centres and commercial centres. Not all centres will be capable of benefitting so it is important to focus on these centres where benefit can be achieved. These centres are Almondvale (Livingston) and Linlithgow.

It is recommended that any focus on linked tourism and retail opportunities and benefits focuses on Linlithgow and Almondvale with the aim of retaining expenditure and increasing top-up shopping trips. The remaining centres should not be neglected but it is important to provide a clear focus on attainable outcomes and benefits.

3.7.3 *Retail Market Context*

The "credit crunch" and market decline has impacted on the non-food market as seen in declining sales but not on the food market, other than a possible slowing of growth. The "big 4" retailers continue to dominate the retail market although the acquisition of Somerfield by the consolidated Co-operative Group has now created a "big 5".

Tesco are by far the dominant retailer although its competitors are realigning themselves to compete over the broader market, with both ASDA and Wm Morrison increasing the quality of their offer.

The decline in specialist foodstores has continued in recent years, although some sectors are resilient and opportunities exist for diversification and specialist offers. However, the major retailers are beginning to embrace organic and fair trade products, including own brand products.

Discounters may not be as well-placed to take advantage of the "credit crunch" as may be expected if the major retailers compete aggressively to retain and attract custom through price cuts and retention initiatives.

Smaller convenience stores are thriving to an extent that may not have been expected due to the fragmentation of shopping habits, a lesser emphasis on planned main trips and increased top-up trips. Some of the main retailers have an established or developing presence in this format (Tesco Metro and Sainsbury's local) and satellite location to larger distributor stores allows increased trading areas.

The growth in the non-food offer continues, with ASDA leading the field in this area. The impact of the "credit crunch" on non-food shopping has begun to manifest itself, but the impact on this market and the inter-relationships between superstore comparison retailing and high street retailing are as yet unclear.

The inquiry of the Competition Commission into superstore retailing has made some recommendations, including a "competition test" in determining planning applications, which is subject to legal challenge by Tesco.

4 Catchments

4.1 *Introduction*

This is a critical stage of the study and underpins all subsequent work. It is vital to define the catchments and to take into account all factors that determine the shopping behaviour of residents.

4.1.1 *Sourcing of mapping.*

WLC has provided base mapping and licensing, including OS raster mapping and boundary data for administrative areas, datazones and postcode sectors, as agreed. WLC has also provided a retail database which was used in this task. A graphic overview of the relationship between geographies, also known as a cartographic model, is provided as Appendix 1.

4.2 *Catchment Identification.*

A defined number of catchments were plotted around existing centres and planned Core Development Areas (CDAs), as listed below.

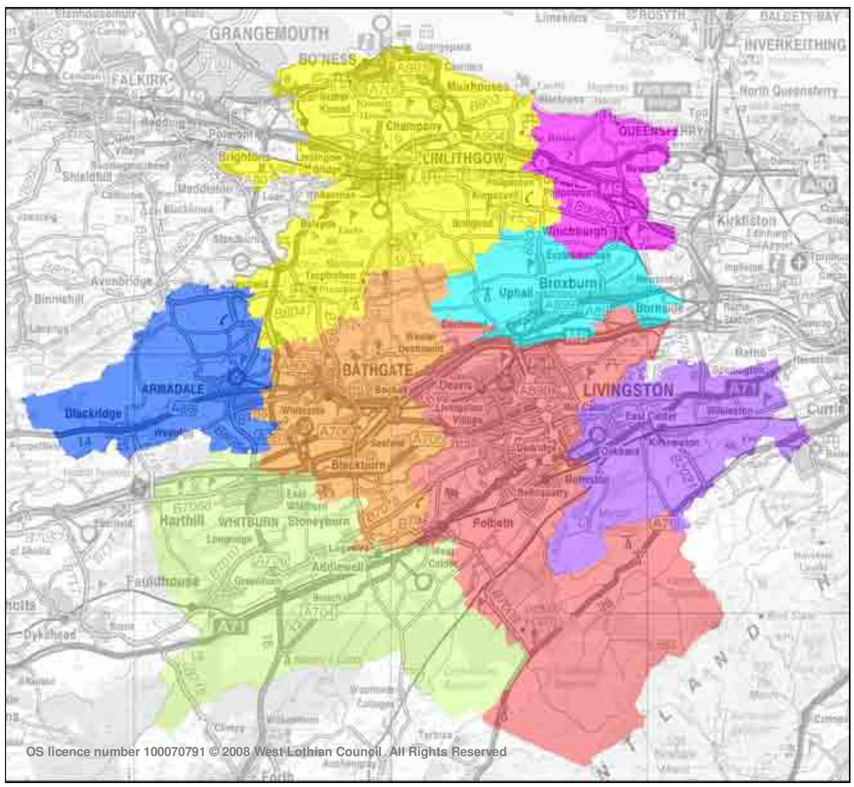
- Almondvale (Livingston)
- Bathgate (district)
- Linlithgow
- Armadale
- Broxburn/Uphall
- East Calder
- Whitburn
- Winchburgh (future town centre)

Existing foodstores stores were mapped using the retail database, based upon relative size, focussing on supermarket and superstore provision. 10 minute drive time isochrones were plotted around these foodstores, and used to assess the current accessibility of convenience shopping to the population of West Lothian and to inform the definition of the catchment boundaries which form the basis of the retail capacity model. The 10-minute isochrone map is shown at Figure 4.1.

The catchment boundaries were considered in light of surveyed shopping patterns and core development areas, with some slight modifications. The final catchment map is shown at Figure 4.1. It should be noted that the catchment boundaries extend slightly beyond West Lothian Council boundaries, to recognise the reality of expenditure being drawn from areas such as Bo'ness and rural west Edinburgh. This should be borne out in the retail capacity chapter, with the retail balance at, or approaching, equilibrium.

Figure 4.1: Catchments.

- Almondvale (Livingston)
- Bathgate
- Linlithgow
- Armadale
- Broxburn
- East Calder
- Whitburn
- Winchburgh



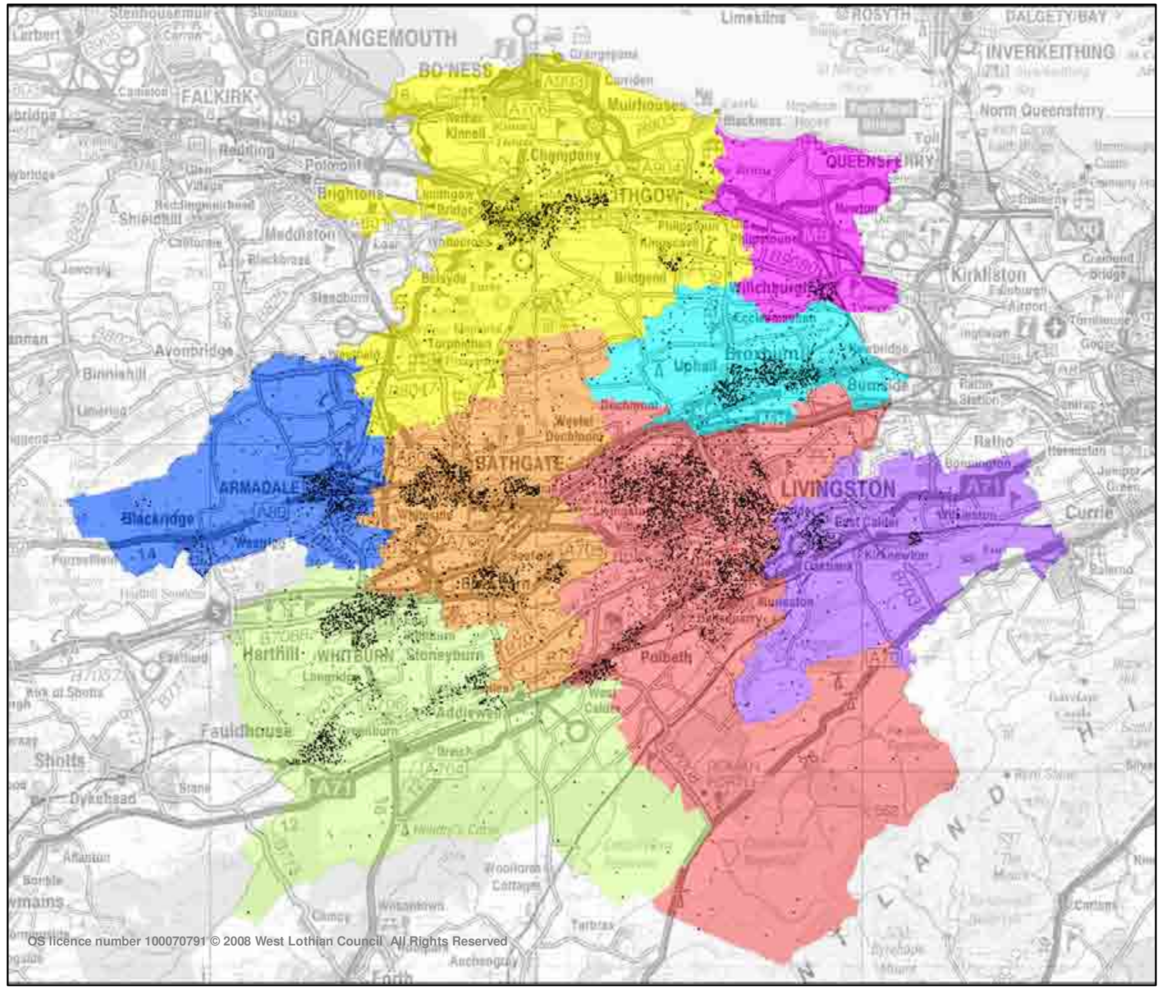
4.3 Population

Population is mapped in Figure 4.2 to provide an indication of the population density and main centres by datazone and by catchment.

4.4 Foodstore Coverage

It is clear, from mapping existing foodstores to define the catchments, that most of West Lothian's population is accessible by car to at least one foodstore. However, coverage is not uniform and areas outwith Livingston and Linlithgow and immediate centres are limited in terms of choice, particularly Broxburn/Uphall, East Calder, West Calder and western West Lothian. A map of foodstores by catchment is below at Figure 4.3. This data is taken forward into the Retail Capacity chapter.

Figure 4.2: Population by Datazone and Catchment (source SNS 2005 1 dot = approx 10 persons)

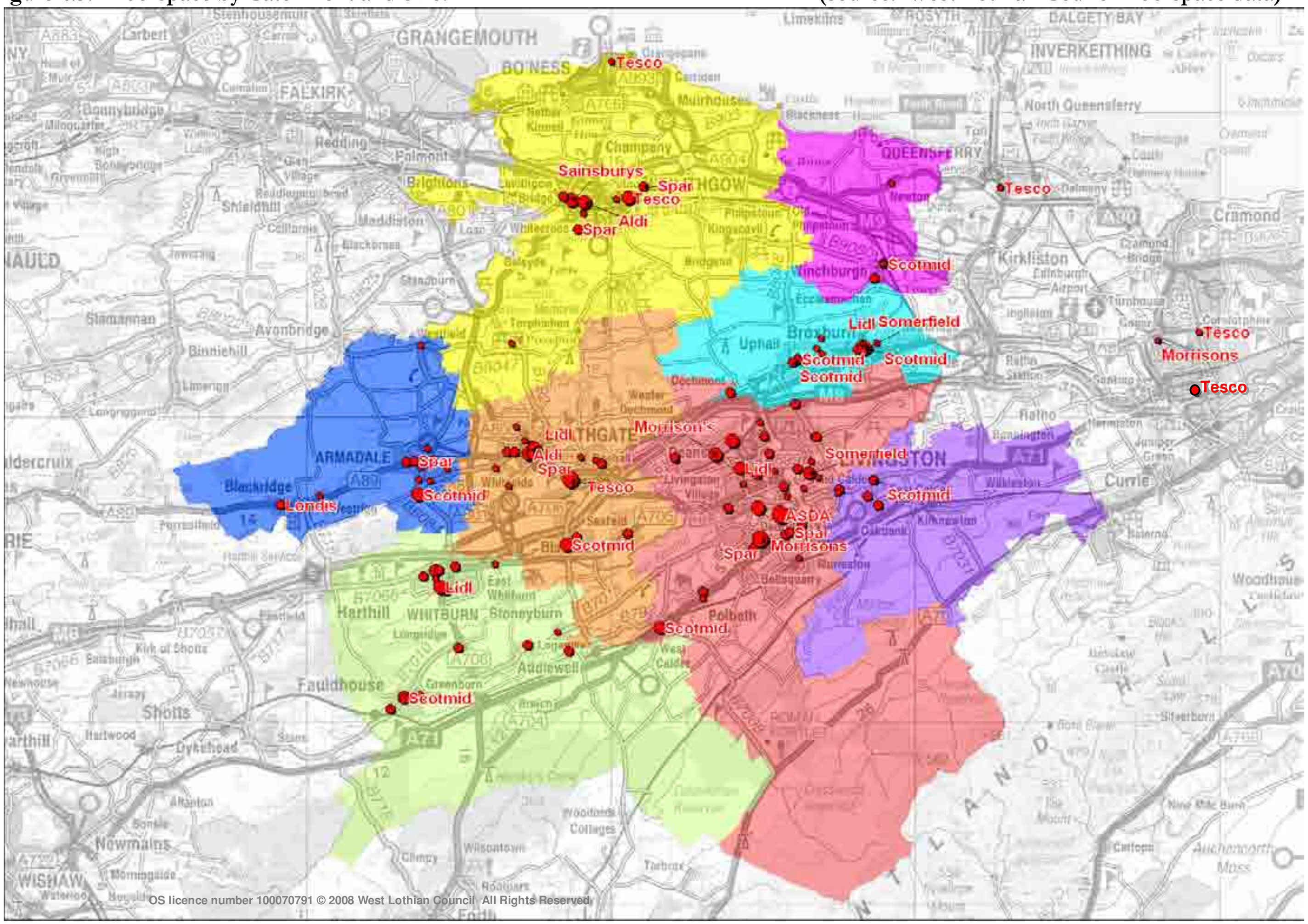


Key – Gross Area Sqm
(approx point sizes)

0-100
100-500
500-1000
1000-5000
5000-10,000
10,000+

Outside West Lothian – not to scale

Figure 4.3: Floorspace by Catchment and Size. **(source: West Lothian Council floorspace data)**



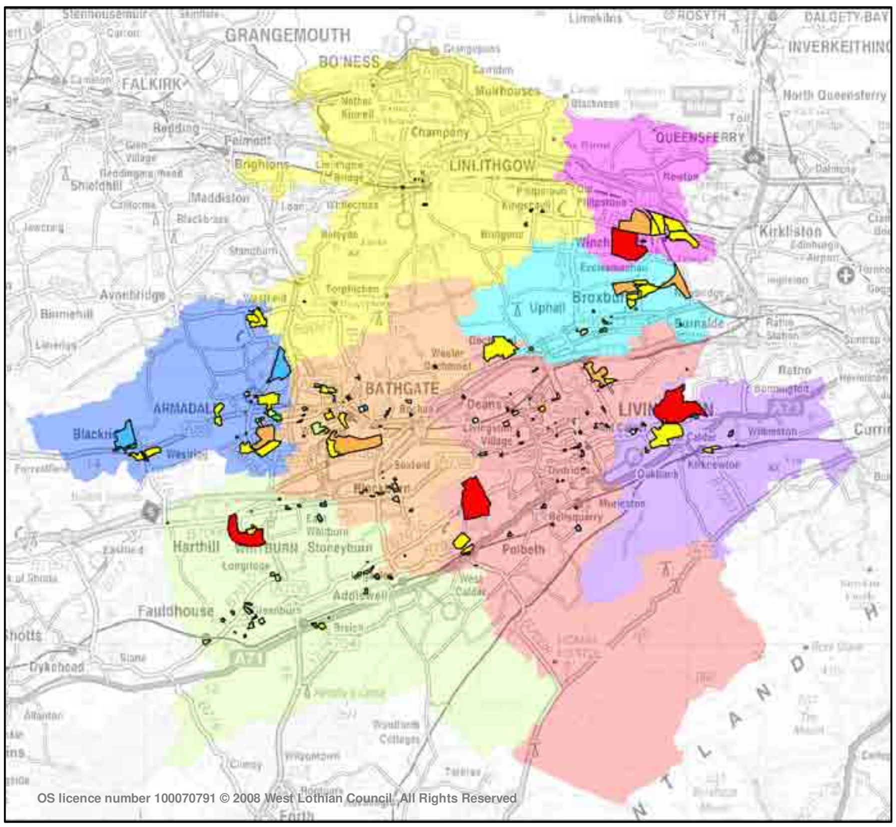
4.5 *Future Housing Allocations*

Future housing allocations informed the catchment definition process. These housing allocations are taken from the 2007 Housing Land Audit and are mapped against the catchments below in Figure 4.4. These are taken forward into the retail capacity chapter.

Figure 4.4: Future Housing Allocation Sites and Units (source: Housing Land Audit 2007)

Key - Units Allocated

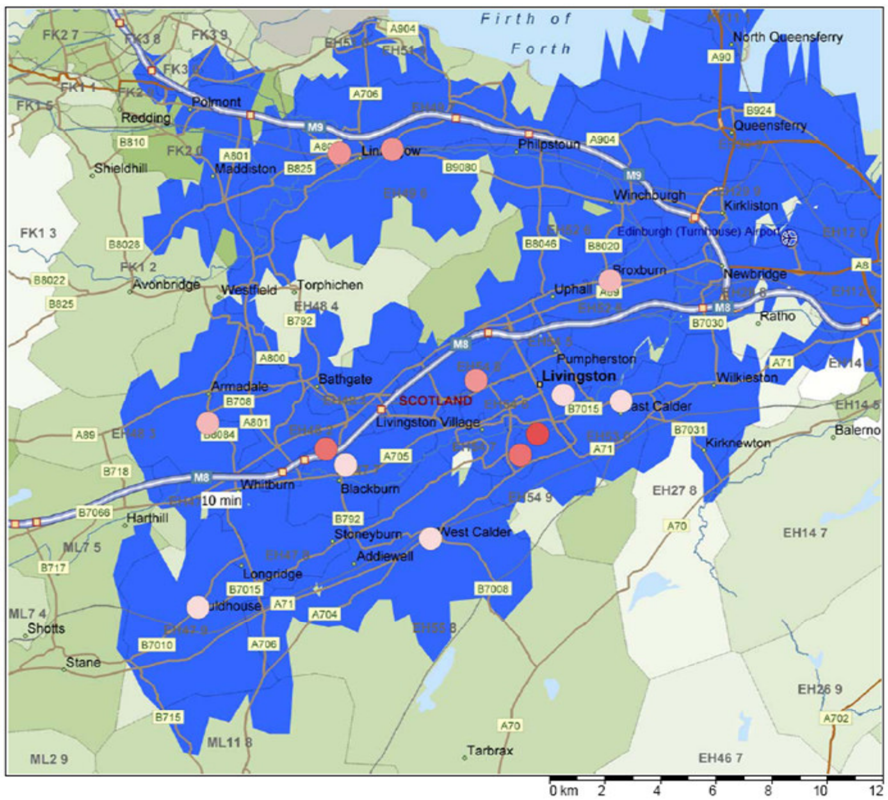
0-20	
20-50	
50-100	
100-500	
500-1000	
1000-2500	



4.6 ***Baseline Accessibility***

As part of the catchment definition process, accessibility to foodstores was considered in terms of drive time isochrones. The major foodstores and the areas within 10 minutes drive time are shown below in Figure 4.5.

Figure 4.5: 10 minute foodstore drive time isochrones (source: MapPoint mapping)



It is clear that most of West Lothian is accessible to at least one supermarket, but there are some areas – mainly rural areas – that are outwith 10 minutes drive of a supermarket. Also, the accessibility to foodstores and shopping facilities by private car and public transport was measured using data from the Scottish Index of Multiple Deprivation (SIMD), and this is considered in greater detail in the chapter on accessibility (Chapter 10).

4.7 ***Conclusion***

Existing and proposed centres can be centred to form logical catchments based on accessibility to foodstores by private car, also considering the dispersal of population, existing floorspace and future housing allocations. Some general observations can be made with regard to accessibility, to be expanded upon later in this report. The behaviour of the catchments should be supported by surveyed shopping patterns and retail capacity within each catchment and West Lothian as a whole.

5 Shopping Survey

5.1 Introduction

The survey of retail shopping patterns is an essential component of retail studies, in order to understand expenditure flows outwith catchments and outwith the study area. This enables the catchment boundaries to be checked and provide an indication of expenditure flows outwith the catchment the study area ("leakage").

5.2 Survey Breakdown

NEMS Market Research were commissioned to undertake the survey work, following initial catchment definition work, based on 1,000 telephone surveys subdivided as follows:

- East Calder – 15% (150 surveys)
- Armadale – 15% (150 surveys)
- Whitburn – 15% (150 surveys)
- Broxburn – 15% (150 surveys)
- Bathgate – 10% (100 surveys)
- Almondvale (Livingston) – 10% (100 surveys)
- Linlithgow – 10% (100 surveys)
- Postcodes from above catchments outwith the council area– 10% (100 surveys)

A copy of the survey is attached as Appendix 2.

5.3 Questionnaire

The questions fall under the main headings below:

- Section A: Shopper Profile
- Section B: Convenience Goods Shopping Pattern
    - Main Food Shopping
    - Top-up Shopping
    - Internet Shopping
    - Expenditure
    - Eating Habits
- Section C: Comparison Goods Shopping Patterns
- Section D: Perceptions of Convenience Goods Shopping Experience
- Section E: Household Details

5.4 Results

5.4.1 *Frequency of Shop*

In terms of Demographics it appears that older households (which are likely to be smaller) tend to shop weekly or more frequently for main food purchases in quantities that can be carried whereas younger households (which are more likely to be larger and have children) tend to do main food shopping in larger bulk and less frequently therefore favouring the one-stop supermarket provision.

In terms of Area, Linlithgow shows greatest frequency of trips to the High Street whereas Armadale respondents shop less frequently with a significant 14% who do a big bulk buy once a month. Curiously, Livingston respondents show least frequency to shop with only 10% shopping more than once per week and 27% less frequently.

5.4.2 *Q02 Primary shopping destination*

The dominance of the ASDA store at Almondvale (Livingston) is clear as it scoops approximately one third of all the main food shopping from across the West Lothian. Indeed the survey shows that with 30.3% going to ASDA Almondvale (Livingston) and 20.6% to Tesco Bathgate, more than half of households surveyed choose to do most of their shopping in just two stores. It is notable that 46.1% of the 18-34 year old respondents choose ASDA compared to 25.4% of the over 55year old respondents indicating a trend towards one-stop shopping There are no significant socio-economic differences in behaviour.

Geographically, however, there is a divide with the Linlithgow catchment operating independently and self sufficiently and shoppers using Livingston very little for convenience shopping. Bathgate respondents were also less inclined to do their main food shop in Livingston with only 31% choosing Livingston and Bathgate retaining 53% loyalty.

5.4.3 *Q03 Reason for Choice*

Unsurprisingly, more than half the respondents gave the main reason for choosing where to do convenience shopping as Convenience (52.7%) followed by price and quality. There were some geographic variations however in the proportion which gave convenience as the main reason for their choice e.g. between Whitburn (41.7%) and Linlithgow (73.3%)

5.4.4 *Q04 and Q05 Secondary and Occasional Destinations*

There were no significant anomalies by demographic as far as secondary destinations for main food shopping and, by area, respondents were evenly spread in that between 30% and 45 % were loyal to their preferred shop saying that they did not shop anywhere else. Morrisons in Livingston, Sainsbury at Linlithgow Bridge and "other shops" in Bathgate were the main attractors of secondary main food/convenience spend.

5.4.5 *Q6 Support for independent foodstores*

Young households are much less frequent supporters of independent foodstores with only 21.9% shopping in them at least once a week compared to 42.1% of the 35-54 year old respondents. Geographically East Calder and Livingston Catchments are least frequent users of independent shops whilst more than half of Armadale respondents shop in independent specialist shops (bakers, butchers and greengrocers) at least weekly followed by 47.6 of Linlithgow respondents.

5.4.6 *Q7 Transport mode used for shopping*

The private car is overwhelmingly the preferred mode of transport used for main food shopping trips by all age groups. The 55+ age group were most likely to shop as a car passenger (28.9%) or to use public transport with 16.3% using the bus. This compares to only 3.5% of the 18-34 age respondents choosing public transport, preferring to take a taxi if a car is not available. Since less than 10% claimed that public transport access to their town centre was poor or very poor [Q22] this must be seen as a deliberate choice rather than a necessity and probably due to the physical difficulty of managing to transport heavy and bulky food shopping by bus.

Whilst in all catchments approximately 80% of main food shopping trips are by car either as a driver or passenger, more people walk to shop in Linlithgow (13.9%) and more in Bathgate, Broxburn and East Calder take the bus (between 11% and 13%).

5.4.7 *Q8 Frequency of Top-up shopping*

There is a general consistency across all catchments of approximately a third of respondents not doing any top-up shopping between supermarket visits and two thirds doing so at least once a week. The 35-54 age group is the most frequent top-up shopper with more than half topping-up several times a week and a further 19.6% doing so once a week.

5.4.8 *Q9 Destination of Top-up spend*

Responses to this question demonstrate that local small supermarkets are very important for top-up shopping and convenient access to fresh food and that smaller stores are favoured as being more convenient for purchasing smaller quantities than superstore sized outlets. Linlithgow stands out for the high proportion of shoppers who use "other" independent High Street shops for topping up (19.4%) followed by Whitburn (18.6%) and Bathgate (18.3%) whereas all other catchments favour branches of national chains of Scotmid, Morrisons, Farmfoods, Somerfield, Iceland, Lidl and Spar outlets for topping up.

5.4.9 *Q10 Secondary Top-up destinations*

A minority of under a quarter of respondents spread top-up shopping beyond a favoured destination,

5.4.10 *Q11 Internet and Home Delivery*

Convenience shopping on the Internet remains a small minority preference of around 2% regularly and 10% occasionally with a distinct socio-economic bias towards the younger and ABC1 households of whom about 17% occasionally do food shopping on line.

5.4.11 *Q12-13 Convenience Spend*

The breakdown of convenience spend is of interest. The average monthly spend is £318 the total spend for the entire survey, broken down below in more detail below, in table 5.1. The output is different from the per capita spend rates employed in retail capacity calculations, which are higher, but this is a coarse measure as it uses average household size and is based on estimated expenditure.

Table 5.1: Convenience Spend Breakdown

Catchment	Total Shop Per Month	Annual Equivalent (x12)	Per Capita Equivalent (divided by 2.32)
Average	£381	£3,816	£1,645
Almondvale (Livingston)	£299	£3,588	£1,547
Armadale	£296	£3,552	£1,531
Bathgate	£347	£4,164	£1,795
Broxburn	£307	£3,684	£1,588
East Calder	£342	£4,104	£1,769
Linlithgow	£360	£4,320	£1,862
Whitburn	£321	£3,852	£1,660

5.4.12 *Q14 Takeaway Meals*

There is a strongly increasing trend towards eating takeaway with 52% of the over 55 year old households never purchasing takeaway meals falling to only 6% of the 18-34 year olds. There is no strong geographic difference from one to another area.

5.4.13 *Q15 eating together as a household*

Despite the rising popularity of carry-outs, there is no evidence that the family meal is diminishing as there is a fairly consistent 80-90% of households that eat at least one meal a day together.

5.4.14 *Q16 Comparison Shopping in Superstores*

Whereas one third of 55+ age group do not buy any comparison items from superstores only 10% of the 18-34 year old respondents do not. This is further evidence of the trend towards one-stop shopping away from use of traditional specialist independent shops.

5.4.15 *Q17 Non-food shopping in Supermarkets*

Clothing, music DVD's, books and electrical goods, pharmaceuticals and household linen and hardware are the most regularly purchased comparison goods with no significant differences by age, socio-economic group or district except the over 55s being less likely to purchase music and DVDs.

5.4.16 *Q18 Main destination for Non-food shopping*

Livingston population is remarkably loyal to Almondvale (Livingston) with 83% doing their non-food shopping there, approximately 70% of Broxburn, East Calder and Whitburn respondents also do most shopping in Livingston with more than half of Armadale and Bathgate shoppers also favouring Livingston. Again the geographic barriers and shape of transport corridors lead to Linlithgow shoppers behaving differently with only 20% choosing Livingston and preferring to split their comparison shopping between Falkirk, Edinburgh City Centre, Linlithgow, Glasgow and Stirling.

5.4.17 *Q19 Satisfaction with Food Shopping provision*

When asked if their local town met food shopping needs a large proportion of Armadale respondents (42%) answered No. There were also high levels of dissatisfaction from Bathgate and Whitburn respondents at 33% and 25.8% respectively. Surprisingly, 87.3% of East Calder respondents professed satisfaction and it must be assumed that they thought of Almondvale (Livingston) as their local neighbourhood centre. There were no significant differences in responses by demography.

5.4.18 *Q20 Reasons for dissatisfaction*

Not enough variety of choice and lack of supermarket were reasons given for those who were dissatisfied with food shopping opportunities leading to 23% in Armadale being unhappy or very unhappy with choice available locally.

5.4.19 *Q21 What improvements are sought*

When asked what would improve shopping experience and encourage respondents to shop more locally, i.e. adopt a more sustainable shopping pattern, the Livingston and Linlithgow respondents were generally content but Armadale respondents were notably less so with a significant 24% calling for a new supermarket.

5.4.20 *Q22 Access by public transport*

With the exception of the third of respondents who did not know, (43.3% of ABC1) there was a uniformly high level of satisfaction with public transport with, on average, less than 10% taking the view that access to the town centre was poor or very poor. Dissatisfaction was greater amongst male and young respondents indicating a trend towards an increasing preference for private car use.

5.5 Summary and Conclusion

The conclusions can be summarised as follows:

5.5.1 *Demographics and Shopping Patterns.*

There is a tendency for older households to shop more frequently than younger households, with older households have a greater tendency to support independent foodstores. More than half of Armadale respondents shop in independents at least weekly although Linlithgow has the greatest frequency of High Street shopping trips and Livingston shoppers shop the least frequently. Top-up shopping is consistent across catchments with one-third not carrying out any top-up shops and two-thirds topping up at least once a week, with the 35-45 age group topping up most frequently Internet shopping is a minority preference of mainly ABC1 households. Younger age groups have a far greater tendency to buy superstore comparison than older age groups, including clothing, music, DVDs, books and electricals, pharmaceuticals, linen and hardware.

5.5.2 *Choice of Foodstore and Satisfaction*

ASDA dominates West Lothian with one-third of spend, Tesco Bathgate is the next most dominant with one-fifth of spend, and ASDA attracts far more young shoppers than older shoppers. Choice is the dominant reason for foodstore choice, with 30-45% of customers are solely loyal to their main foodstore. Linlithgow is very well self-contained, Bathgate also but to a lesser degree. There is a high degree of dissatisfaction with food shopping in Armadale, Bathgate and Whitburn, with East Calder residents appearing to identify with Almondvale (Livingston) as their local neighbourhood centre. 24% of Armadale respondents called for a new supermarket.

5.5.3 *Accessibility*

The private car is the preferred mode of transport, with younger respondents preferring to use a taxi over a bus if a car is not available. Public transport access to town centres is generally rated as acceptable or good. The catchment with the largest use of walking is Linlithgow and the catchments with the largest use of public transport are Bathgate, Broxburn and East Calder

5.5.4 *Conclusion*

The dominance of Asda and Tesco Bathgate are clearly evident, as is the self-containment of Linlithgow. There is demand for improvements in food shopping in Armadale, Bathgate and Whitburn in particular, although East Calder residents identify with Almondvale (Livingston)[7]. There is a strong reliance on the private car even though public transport accessibility is generally acceptable or good.

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[7] It should be noted that no surveys have been conducted at specific stores.

6 Qualitative Retail Assessment

6.1 *Introduction*

This section summarises the findings of a qualitative retail assessment for key centres within the study area: Broxburn, Bathgate, Armadale, Linlithgow, Livingston, East Calder, Winchburgh and Whitburn.

The importance of sustaining town centres is often underestimated. Town centres act as the life blood for communities meeting the social and economical needs of their local population. In the last 30 years, the traditional structure and role of the town centre has been eroded by changing retail development. The growing trend of edge of town and out of town retail led by increasing demand for larger retail formats has benefited many town centres by bolstering trade and attracting new investment. In other cases it can displace trade from the town centre or neighbouring centres resulting in shop closures and loss of vitality and viability for the town centre.

Despite the fact that National Planning Policy has consistently stated support in principle for the role of Town Centres as the foci for the social and economic needs of communities and has sought, through planning guidance, to maintain the vitality of these places, the fact is that over the past 30 years, the traditional function of Town Centres as the primary location of marketing, trade and social interaction has steadily eroded. This has been brought about by changing social and economic pressures.

For example, over the years the proportion of women that have been obliged to enter the work place and become economically active has risen, reducing time available for domestic roles and regular shopping close to home. At the same time, car ownership has increased and people have felt better able to travel to access the greater choice afforded by larger centres and bigger concentrations of shops. These trends have led, in turn, to the commercial response of National Multiple Retailers to meet increasing demand for more convenient one-stop-shopping opportunities, often in the form of large box format out-of-centre superstores. This has sometimes benefited the higher order centers in terms of increasing employment and investment but has led to transfer of custom and spend away from the smaller, traditional independent retailers, in smaller town and neighbourhood centres, leading to reduced turnover, reduced capacity for investment by small businesses and ultimately store closures and loss of vitality of the centres as a whole. This effect is sometimes an unintended and unexpected consequence as retailers often rely on a critical mass of floorspace to attract the footfall, or passing trade necessary to maintaining a viable customer base. So, for example, by leading to closure of High Street bakers and butchers and reducing the number of people who travel into a town's High Street, an out of centre foodstore may impact on the viability of a town centre gift shop, even though it does not compete directly.

In order to restore some of the lost vigour of traditional town centres, new ways of serving the community and attracting people back to the centres have had to be found. In some cases the intrinsic environmental attractions and historic interest have enables a new tourism role to be developed or strengthened leading to a growth in cafes and specialist retailers of shops to browse in (books, gifts antiques etc). In others a shift from retailing of goods to personal and leisure services has been more appropriate so there may be a rise in businesses such as video rental, beauty salons, hairdressers estate agents, and in other places a reduced commercial role has had to be accepted with change of use from retail to residential having to be permitted to prevent deterioration of the physical fabric of the centre.

In order to monitor the role of centres and so to be prepared for an appropriate policy response, the study has conducted a qualitative review of the retail sector and undertaken an assessment of each of the identified centres in West Lothian.

6.2 *Methodology*

The assessment methodology involved undertaking both a quantitative and a qualitative survey of each town. Initial desktop research was used to quantify retail provision by analysing floorspace data supplied by the Scottish Assessors Agency. Each centre was visited and the composition of the main shopping streets reviewed to record the convenience retail offer. The assessment was based on observations from site visits to each settlement which focused on town centre environment and access.

6.3 Floorspace Summary

6.3.1 In total, West Lothian contains over 70,000 sq m gross of convenience retail floorspace, half of which is located in Livingston (including neighbourhood centres). Each of the 'big four' retailers operate within the study area which account for the larger sized stores and are concentrated in the larger settlements of Livingston (Almondvale (Livingston)), Bathgate and Linlithgow. Smaller national retailers and discount food retailers operate within all of the six key settlements in addition to the usual staple of discount food retailers (i.e. Aldi, Lidl, Farmfoods etc), national local retailers (Scotmid, Co-op, Spar, Nisa, Keystore) and independent grocers.

6.3.2 Table 6.1 provides a breakdown of convenience offer in terms of units by size at key settlements:

Table 6.1: Convenience retail by size and settlement

Settlement	Convenience store size		
	Small (>1,500 sq m)	Medium (1,500 - 2,499 sq m)	Large (< 2,500 sq m)
Armadale	11	0	0
Bathgate	13	1	1
Broxburn	8	1	0
East Calder	4	0	0
Linlithgow	5	0	2
Livingston	23	0	4
Whitburn	7	1	0
Winchburgh	3	0	0

6.4 Convenience Retail by Settlement

The following section provides a qualitative assessment of retail provision focusing on convenience retail offer in each of the catchment key settlements.

6.5 Almondvale (Livingston)

6.5.1 Livingston is the primary retail centre for West Lothian as well as being one of the largest and most popular retail centres in Scotland. Built as one of 5 new towns in Scotland, Livingston was designed with a focus on retailing. The core retail area includes Livingston Outlet Centre, Livingston Retail Park and Almondvale Shopping Centre which are surrounded by smaller neighbourhood centres providing local retail provision. Almondvale Shopping Centre has undergone refurbishment and expansion over the past twenty years. Further development is currently taking place with the Elements Shopping Centre. On completion, the development will provide 38,000 sq m (375,000 sq ft) of new retail floorspace.

6.5.2 Focusing on convenience retail offer, Asda Almondvale is the single largest foodstore operator with 17,600 sq m of floorspace and also the best performing Asda store in Scotland in terms of turnover by floorspace. Two Morrison stores are located within Livingston, one at Livingston Retail Park and the second at the Carmondean Centre.

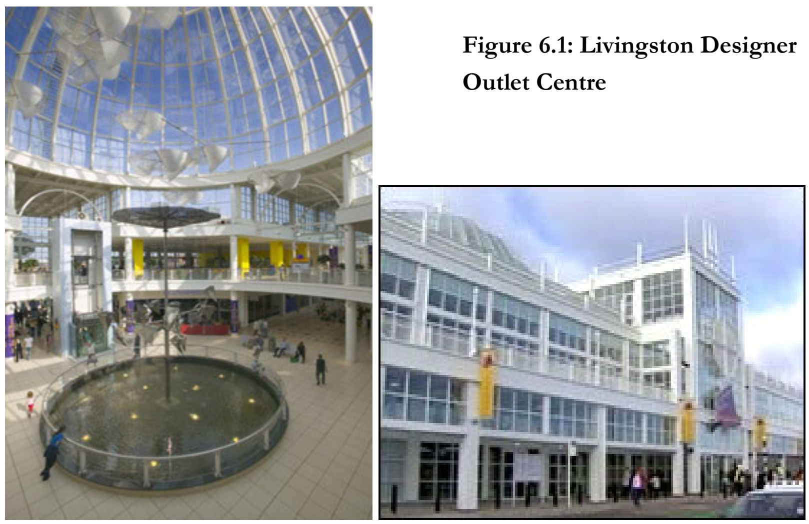


Figure 6.1: Livingston Designer Outlet Centre

6.5.3 The six neighbourhood centres which make up Livingston are served by smaller national retailers such as Somerfield, Spar and Co-op. Additional independent grocers and mini-market style retail units make up the remaining convenience provision. The range of retailers is perhaps limited, this may be as a consequence of the dominance of Asda.

Table 6.2: Convenience Retail (Almondvale (Livingston))

Key Convenience Retailers	***Size (sq m gross)***
Asda	17,600
Morrisons	8,080
Somerfield	1,170
Lidl	1,300

6.5.4 Convenience retail provision has been further enhanced with the opening of the Elements Shopping Centre next to the Almondvale Centre. This includes a 9,000 sq m Marks and Spencer unit, replacing the smaller convenience unit at Almondvale with a larger convenience floorplate.

6.6 Bathgate

6.6.1 Bathgate is the second largest settlement in West Lothian after Livingston with retail floorspace totalling 12,180 sq m. Retail activitiy is focused on George Street and Hopetoun Street which offer a range of mainly comparison and retail service uses. However, the quality of retail on George Street is notably poor for a High Street. A high proportion of vacant units and charity shops were noted on the day of survey. In terms of convenience retail, Tesco serves as the primary food retailer in Bathgate which operates from a large format at the edge of the town centre.

Figure 6.2: George Street, Bathgate

6.6.2 A number of smaller national retailers are present namely Spar and Keystore and discount convenience retailers Aldi and Lidl. Additional convenience retail is supported with a relatively large number of local grocers (10) interspersed around the town centre and wider settlement. Bathgate also contains a choice of traditional convenience offer i.e. butcher (1), bakeries (2), fishmonger (1), green grocer (1) and delicatessen (1).

Table 6.3: Convenience Retail (Bathgate)

Key Convenience Retailers	*Size (sq m gross)*
Tesco	*7,050*
Aldi	*2,120*
Lidl	*1,170*

6.7 Linlithgow/Linlithgow Bridge

6.7.1 Linlithgow is the second largest retail centre in West Lothian with approximately 13,500 sq m of retail floorspace. The town centre follows a traditional and historic structure with retail concentrated along the High Street which runs between High Port and Low Port. The High Street is dominated by a diverse range of local and independent retail (both convenience and comparison) and retail services. The historic structure of buildings on the High Street means that units are small and with little scope for reconfiguration due to conservation policy. The Regent Centre, located at West Port, comprises a 1 to 2 story mall and currently anchored by a medium sized Tesco store. More recently, the Stockbridge Retail Park (5,200 sq m gross) was developed at Linlithgow Bridge, approximately one miles west of Linlithgow town. A medium size Sainsbury's store is located adjacent to the retail park.

Figure 6.3: (left) Sainsburys Linlithgow Bridge

Figure 6.4: (below) Stockbridge Retail Park

6.7.2 As indicated from para 6.7.1, Linlithgow benefits from a choice of national convenience retailers. In addition to Tesco and Sainsburys, the town centre is supported by a number of smaller local and independent grocers (5) and discount retailer, Aldi. Traditional convenience retailers are located within the town centre and include bakeries (3), butcher (1) and fishmonger (1). Niche convenience retail is also present including specialist confectionary and cake shops (2), delicatessens (2) and health food shops (2).

Figure 6.5: High Street, Linlithgow

6.7.3 As Linlithgow is a popular tourist destination, the town contains a high proportion of tourism related retail. Further, Linlithgow has a notably affluent population which is reflected in the quality of shops on offer. The High Street contains a high number of niche retailing and higher quality retail services particularly compared to other centres in West Lothian.

Table 6.4: Convenience Retail (Linlithgow)

Key Convenience Retailers	***Size (sq m gross)***
Tesco	*2,700*
Sainsburys	*2,970*
Aldi	*2,000*

6.7.4 A planning application is expected for a retail led development at an out-of-centre site north east of the town centre (Boghall East development site). A new supermarket would significantly increase convenience offer within the catchment.

6.8 ***Armadale***

6.8.1 Retail is limited in Armadale and located primarily along the town thoroughfare, East Main Street and West Main Street. The latter serves as the primary retail area also accommodating core retail services such banks, cafes, hair salons etc. Retail comprises mostly small scale convenience retail with comparison retail limited to a number of household/discount operators.

Figure 6.6: West Main Street, Armadale

6.8.2 In terms of convenience offer, the population is served by a small Scotmid store (1,500 sq m), smaller national operators such as Nisa and Spar and independent grocers (8) which make up convenience offer. Like the majority of towns and villages in West Lothian, traditional convenience retailers are still present including butchers (2), bakery (1) and confectioner (1).

6.9 ***Broxburn***

6.9.1 Retail is concentrated along East Main Street which serves as the primary shopping area for the settlement including a small scale convenience, comparison and key retail services. The town has a positive balance of independent and national retail providers. A small shopping mall, Argyll Court, is located at the western end of East Main Street. The mall comprises 9 retail units which is anchored by two national retailers, Peacocks and Boots, with remaining units occupied by retail service uses including a cafe, hair salon, takeaway, florist and estate agent.

Figure 6.7: Argyll Court Shopping Centre, Broxburn

6.9.2 Further retail provision is located along Greendykes Road with a number of comparison and retail service uses. Broxburn is served by a medium sized Somerfield located on West Main Street and a Lidl store situated on Greendykes Road. Further convenience offers is provided by independent/local grocers (5) and traditional convenience retailers including butchers (2), bakeries (3) and fishmonger (1). In response to the settlements influx of eastern European migrants over the years, a Polish delicatessen is located on Greendykes Road adding to the mix of convenience retail on offer.

Table 6.5: Convenience Retail (Broxburn)

Key Convenience Retailers	***Size (sq m gross)***
Scotmid	*1,500*
Somerfield	*1,290*
Lidl	*1,300*

6.9.3 The main street contains a number of larger vacant units to the eastern end of West Main Street which may be due to a displacement of footfall to retail development to the east i.e. Somerfield and Argyll Court.

6.10 East Calder

6.10.1 As one of the smaller settlements in West Lothian, retail provision is in turn limited. The settlement's main thoroughfare, Main Street, is largely populated with terraced housing and interspersed with retail (mainly convenience) and retail service units. The settlement is served by one main foodstore (Scotmid) and a small Costcutter store which also serves as the local post office. On the day of survey, a mobile fishmonger was visiting the town.

Figure 6.8: Convenience offer along Main Street, East Calder

6.11 *Whitburn*

6.11.1 Town centre activity is concentrated along West Main Street which contains a mix of convenience, comparison and retail services. East Main Street and Manse Street serve as secondary retail locations dominated by retail services, specialist retailing and a number of charity shops. Convenience retail is made up of a mix of small national local operators (Londis and Iceland) and independent grocers (5). Discount convenience retailer Lidl provides the largest convenience floorplate for the settlement (1,585 sq m) located at the edge of the town centre (Longbridge Road). The town lacks quality convenience retail for a settlement of this size.

Figure 6.9: West Main Street, Whitburn

6.12 Winchburgh

6.12.1 Winchburgh is located approximately 3 miles north-east of Broxburn and is identified as a village in the Local Plan. The village contains very basic retail provision and is limited to a small Scotmid store, two smaller grocers (Keystore and mini-mart) and a butcher, all of which are all located along Main Street. A third grocer is located at Glass Crescent. Retail services include a public house, takeaway, hair salon and post office.

Figure 6.10: Convenience offer in Winchburgh

7 Town Centre Assessment

7.1 *Introduction*

The purpose of the town centre assessment is to provide a qualitative review of the identified catchment centres, to assess the role and function of each centre and to provide a subjective commentary on a range of factors commonly used to assess how well a centre caters for its users. It is important to rate the quality of shopping experience offered by traditional centres because, increasingly, they are competing for custom with well managed malls which provide clean, comfortable, traffic free, weather protected environments with free car parking. The following categories are rated as very poor, poor, acceptable, good or very good: accessibility by various modes, the condition of buildings and public realm in terms of environment and repair, and the amenities available, all of which impact on the shopping experience and the ability of a town to attract or retain customers. The results were tabulated and colour coded for ease of reference (see table 7.1 below.)

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

Table 7.1: Summary of Qualitative Health Check Finding

	Pedestrian	Public Transport	Car/Van	Cycling	Mobility Impaired	Buildings	Public Realm	Information	Environment	Amenities	Leisure
Armadale	Good	Good	Good	Poor	Acceptable	Poor	Poor	Acceptable	Poor	Acceptable	Poor
Bathgate	Excellent	Excellent	Good	Poor	Acceptable	Acceptable	Good	Acceptable	Good	Good	Acceptable
Broxburn	Good	Good	Good	Poor	Acceptable	Poor	Poor	Poor	Acceptable	Acceptable	Poor
East Calder	Good	Acceptable	Good	Poor	Acceptable	Acceptable	Poor	Poor	Good	Acceptable	Acceptable
Linlithgow	Excellent	Excellent	Good	Acceptable	Acceptable	Excellent	Good	Good	Good	Good	Good
Livingston	Excellent	Excellent	Excellent	Poor	Excellent	Excellent	Excellent	Good	Good	Good	Good
Whitburn	Good	Good	Good	Poor	Acceptable	Poor	Poor	Acceptable	Poor	Acceptable	Poor
Winchburgh	Good	Poor	Good	Poor	Acceptable	Poor	Acceptable	Acceptable	Poor	Acceptable	Poor

7.2 ***Pedestrian Facilities***

7.2.1 Pedestrian Facilities: are generally good across the six towns. The linear structure of the smaller settlements (Armadale, Broxburn, Whitburn and Winchburgh) provides few traffic obstacles for pedestrians. Each town contains a series of pedestrian lights and traffic islands along their high street. The high streets could benefit from widening although this would impact on on-street car parking.

7.2.2 The larger towns of Bathgate and Linlithgow provide increased pedestrian facilities including pedestrian zones and shared surface crossings which promotes pedestrian connectivity. In particular, Bathgate scores high for pedestrian facilities. George Street, part of the centre's shopping precinct, has been pedestrianised. A shared surface where George Street intersects with Hopetoun Street.

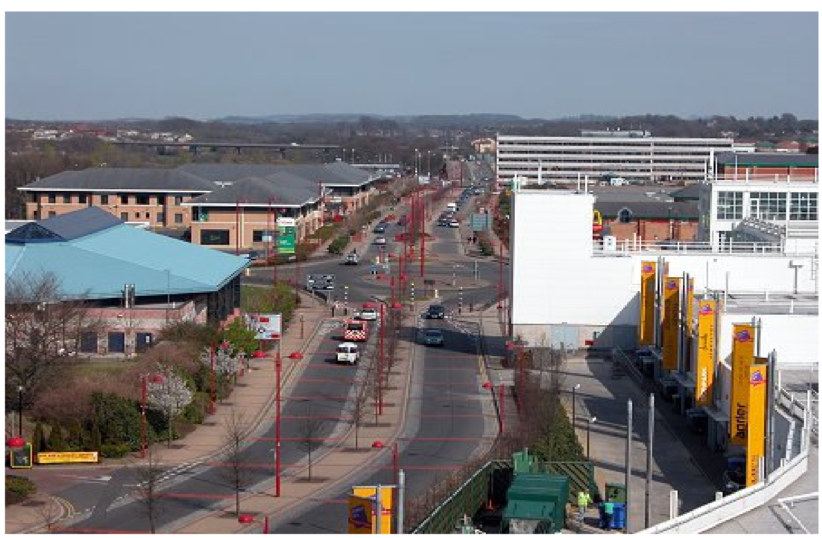
Figure 7.2: Examples of pedestrian facilities in Bathgate: pedestrianisation of George Place (l); and shared surface on Hopetoun Street (r).

7.2.3 Within Linlithgow town centre, Linlithgow Cross has been converted to a shared surface. Pedestrian area is provided within the Regent Centre. Pedestrian facilities could be improved along Linlithgow High Street which accommodates two pedestrian crossings. A high volume of traffic passes along the street and coupled with on-street parking on each side of the street provides barriers to pedestrians.

Figure 7.3: Linlithgow: pedestrian areas at Linlithgow Cross (l) and Regent Square (r).

7.2.4 The neighbourhood centres serving Livingston's wider population provide good pedestrian facilities. Retail and other services are accommodated within a pedestrian shopping precinct. At the time of survey, pedestrian access between these centres was poor, but this was improved when The Centre was opened in October 2008. Similarly, the larger retail centres in Livingston (i.e. Almondvale Shopping Centre, Livingston Retail Park, Livingston Designer Outlet) represent covered pedestrianised high streets. However, the myriad of roads which surround these centres discourages walking and cycling from neighbouring locations with access suited more to vehicles.

Figure 7.4: Evidence of vehicle led access arrangement at Livingston town centre.



7.3 *Vehicle Access/Parking*

7.3.1 All surveyed settlements provide an adequate level of vehicle access and parking relative to their size. Broxburn, Armadale, Whitburn, Livingston and Bathgate are well served by the local road network and easily accessed from the M8 while the M9 offers direct vehicle access to Linlithgow and Winchburgh. Broxburn, Armadale and Whitburn also benefit from wide thoroughfares which promote vehicle access while allowing for on-street parking. East Calder scored worst for vehicle access. The settlement does not have direct access links to the primary road network (i.e. trunk roads and motorway) and two-way traffic is restricted along main thoroughfare (Main Street) due to on-street parking.

7.3.2 Within the smaller settlements, parking is largely facilitated on-street which is free and subject to standard parking time restrictions (45 minute stay). Public car parks are present within all settlements. As a car-orientated destination, Livingston offers excellent car parking facilities. East Calder again scores worse parking provision. There was a notable lack of available on-street car spaces within the settlement and the public car park which is shared with the local health centre and adjacent businesses was at full capacity.

Figure 7.5: Parking facilities at Bathgate (l) and Broxburn (r).

7.4 *Public Transport Facilities*

7.4.1 Public Transport Facilities were considered to be generally good for the majority of settlements. A number of private operators run bus routes within West Lothian linking smaller settlements with larger service centres. These include FirstBus, Blue Bus, Autowater, Passenger Travel, Lothian Bus, Prentice Westwood, E&M Horsburgh, Davidson Buses and SD Travel. Many bus routes provide direct links between settlements and large convenience operators such as Asda Livingston, Morrisons Livingston, Bathgate Tesco, Appendix 1 details bus routes provided for each of the catchment centres. Express bus services are also available for competitive retail centres and stores including Edinburgh city centre, the Gyle Shopping Centre, Asda Newmains.

7.4.2 Train services operate from Bathgate, Livingston (south and north) and Linlithgow. First Scotrail operate services between Bathgate and Edinburgh which also serves Livingston North. A second rail station at Livingston South provides links to Edinburgh and Glasgow. Linlithgow is served by the Edinburgh-Glasgow rail shuttle which offers a high frequency service between both cities. The Edinburgh – Glasgow rail link passes under Winchburgh via the Winchburgh Tunnel. Rail services operated from Winchburgh up until the year 1930. The potential to reopen this rail link should be investigated particularly to coincide with housing expansion plans for the settlement. This could consolidate shopping links with Linlithgow.

7.4.3 Public transport facilities are more limited in Winchburgh compared to the other settlements. This is possibly due to the location of the settlement from the main east – west transport corridor which links the towns of Armadale, Broxburn, Whitburn, Scheduled bus services operate from Winchburgh to Broxburn, Linlithgow, Edinburgh and South Queensferry.

7.5 Cycling

Overall, facilities for cyclists are poor across the key settlements with few cycle routes, cycle lanes or cycle safes, provided. Facilities are marginally better at Linlithgow. A cycle lane, albeit disconnected at parts, runs between Linlithgow town centre and Linlithgow Bridge. Bike parking facilities are available at the larger supermarkets i.e. Tesco, Asda and Morrisons.

Figure 7.6: Cycle lanes at Linlithgow Bridge

7.6 ***Mobility Impaired Provision***

Mobility Impaired provision was evident in all the settlements surveyed. Examples include dropped kerbs and tactile paving at traffic lights and pedestrian crossings. Badge parking spaces were evident in the larger centres i.e. Livingston, Bathgate and Linlithgow. The larger convenience outlets provide dedicated spaces for mobility impaired shoppers including disabled persons, pregnant mothers and parents with infants. In addition, Shopmobility offer services at Almondvale Shopping Centre.

Figure 7.7: Example of dropped kerb and tactile paving in Armadale.

7.6.1 ***Condition of Buildings***

7.6.2 Building fabric and the quality of presentation of the retail frontages and upper floors on the main shopping streets often correlates to the economic health and level of investment for a centre. The quality of buildings and streetscape is noticeably poor in the majority of settlements, in particular Armadale, Whitburn and Winchburgh. High streets in the three settlements contained a number of vacant and derelict buildings. There are many examples of eyesore developments the along high streets which lack any thought in design and compatibility with neighbouring buildings. Building condition and streetscape for East Calder was generally good. The settlement contained only one vacant unit.

Figure 7.8: Vacant building on West Main Street (l); example of poor quality development on Main Street, Winchburgh (r).

7.6.3 Shop frontages lacked uniformity in most of the towns visited giving the high street an untidy appearance. This varied with different settlement but was particularly poor in Armadale, Whitburn and Winchburgh. Despite recent improvements schemes along George Street, Bathgate, it is let down by poor shop frontages, vacant and temporary shops.

7.6.4 Not surprisingly Linlithgow scores highest for building condition and streetscape. The town's reliance on tourism provides an incentive to maintain its high street and historic buildings. Unlike other settlements in West Lothian, Livingston is unique in that it does not have a traditional high street. The Designer Outlet Centre, Almondvale Shopping Centre and its components (The Elements, The Avenue, Almondvale Walk and Almondvale Place) offer high quality design and provide a pleasant shopping environment.

Figure 7.9: Livingston Designer Outlet Centre (l); shop fronts, High Street Linlithgow (r)

7.7 Public Realm

Armadale, Broxburn, East Calder and Whitburn could all benefit from general improvement to the public realm. Winchburgh contains an attractive green space however the wider area is in need of general public realm upgrade. Bathgate, Linlithgow and Livingston (Shopping centre and retail parks) score well with public realm. In particular, recent public realm improvements at George Place, Bathgate has created an attractive public area which has been taken advantage of by local businesses with good effect.

Figure 7.10: Example of effective public realm, George Place, Bathgate.

7.8 Information

7.8.1 Information is available for the majority of settlements (with exception for Whitburn, East Calder and Broxburn) on the internet. Linlithgow, Livingston, Winchburgh and Armadale provide comprehensive information through dedicated websites which offer data on shopping provision i.e. a business directory.

7.8.2 Within the centres, information is less available. Linlithgow and Livingston provide visitor information points. Floorplans are available at various points within Almondvale Shopping Centre and the Designer Outlet Centre which identify retailers and the location of centre facilities.

7.9 *Environment and Maintenance*

The environment and maintenance of the town centres varied. East Calder, Bathgate and Linlithgow scored well with evidence of building maintenance being carried out on George Street at the time of survey. Armadale, Winchburgh and Whitburn scored worst for poor maintenance of high street buildings which relates back to scoring on building condition and streetscape.

7.10 *Amenities*

The level of amenity provision varied across the settlements. The larger settlements of Livingston, Bathgate and Linlithgow offer higher provision which is expected of settlements of their size. The smaller settlements provide adequate amenities provision such including a local post-office, public toilets and free cash-points.

7.11 *Leisure Facilities*

The smaller settlements of Broxburn, Winchburgh, East Calder and Armadale did not score well for leisure facilities. Whitburn is better served relative to a settlement of its size providing centrally located leisure facilities. Leisure facilities are adequately provided at Bathgate, Linlithgow and Livingston.

7.12 *Conclusion – Chapter 6 and Chapter 7*

7.12.1 The performance of the centres assessed is summarised below:

(a) Almondvale (Livingston) is performing as a successful sub-regional centre, with large foodstores and smaller retailers serving six neighbourhood centres, and further expansion planned. Facilities are generally good or excellent although cycling facilities could be improved.

(b) Bathgate has a poor quality of retail for a High Street, with a high proportion of vacant units and charity shops, and the edge-of-centre Tesco serves as the primary food retailer. There is a choice of traditional convenience retailing. Facilities in Bathgate are generally excellent, good or acceptable although cycling facilities are lacking. There may be scope for improving mobility-impaired facilities, the conditions of buildings, information availability and leisure facilities. Bathgate is the subject of an Action Plan, which identifies parking and signage and the quality of the town centre and streetscape as opportunities for improvement, and the Airdrie-Bathgate rail link as an opportunity.

(c) Linlithgow has a traditional High Street with a diverse range of local and independent retail and numerous historic buildings, which enhance the character of the public realm but which offer little scope for larger retailers or expansion. There are two medium-sized superstores at either end of the town. There are a number of specialist and independent retailers, particularly as the town is a popular tourist destination. Linlithgow is generally excellent or good in terms of facilities, but cycling and mobility-impared facilities could be improved. There is a commitment to a Linlithgow Action Plan which should identify possible opportunities for improvements. In addition, there is a West Lothian Tourist Plan which focuses on Almondvale (Livingston) and Linlithgow, and the refurbishment of the Burgh Halls and integration of a visitor centre may provide further opportunities.

(d) Armadale has a limited retail offer, with smaller operators and traditional convenience retailers. Armadale could be enhanced in terms of buildings, public realm, cycling, environment and leisure. Armadale is also subject to an Action Plan commitment through the Local Plan, and a future Action Plan should capture issues and scope for improvements. Future large-scale housing development may also drive up the quality of the town centre.

(e) Broxburn has positive balance of independent and national retailers, with a small shopping centre and medium-sized foodstores, also a range of independent and specialist grocers including a Polish delicatessen. There are a number of larger vacant units. Broxburn could be enhanced in terms of buildings, public realm, cycling, information and leisure. There is a Local Plan commitment to a future Broxburn/Uphall Action Plan which should capture issues and scope for improvements. Future large-scale housing development may also drive up the quality of the town centre.

(f) East Calder is a small settlement with limited retail provision, only one main foodstore. The future of East Calder is very much dependent upon the Core Development Area and large-scale housing development, including masterplanning opportunities.

(g) Whitburn lacks quality convenience retail for a town of its size, with a mix of small nationals and independent grocers and one discounter with a larger floorplate. Whitburn could be enhanced in terms of buildings, public realm, cycling, environment and leisure. The town is the subject of an Action Plan commitment through the Local Plan, which should capture issues and scope for improvements.

(h) Winchburgh has only basic retail provision. The future of Winchburgh is very much dependent upon the Core Development Area and large-scale housing development, including masterplanning opportunities. The railway line offers a significant opportunity and public transport will need to be improved.

7.12.2 It is clear that there is scope for improvements in the centres of Armadale, Broxburn, Whitburn and Winchburgh in particular. These improvements would contribute towards a more attractive and positive shopping experience, and in conjunction with meeting identified floorspace needs, should assist in retaining expenditure in these catchments. Some improvements will be delivered through town centre action planning and some through future masterplanning, and Table 7.2 below reiterates the summary of the assessment of these centres, focusing on the priority centres.

Table 7.2: Summary of Results

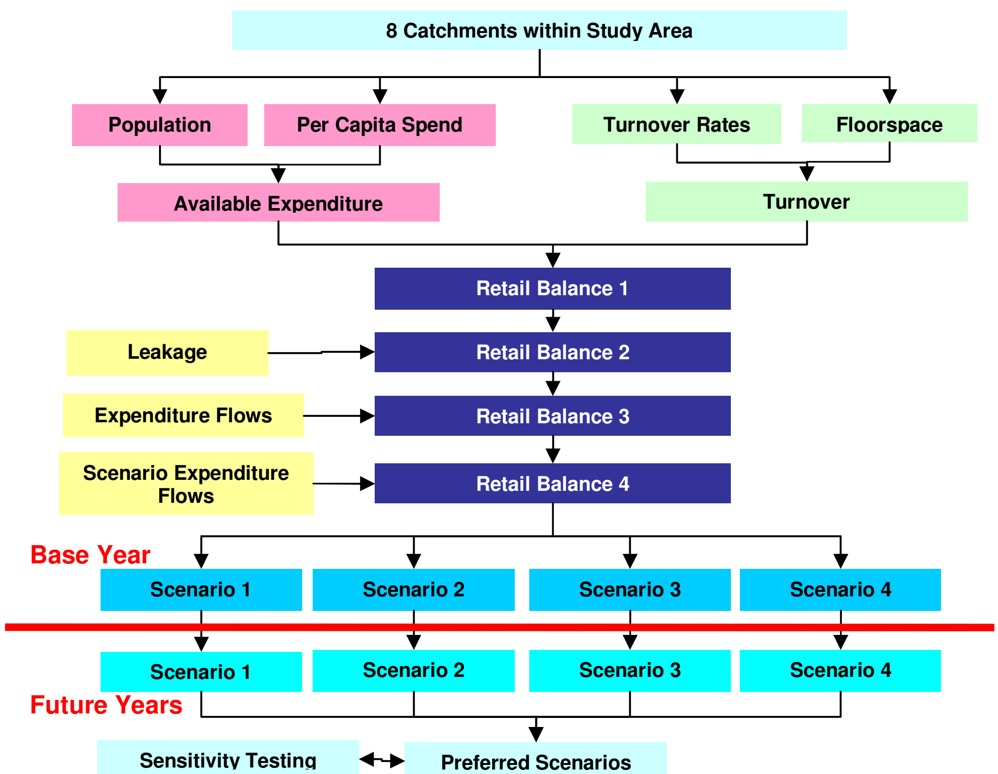
	Pedestrian	Public Transport	Car/Van	Cycling	Mobility Impaired	Buildings	Public Realm	Information	Environment	Amenities	Leisure
Armadale	Good	Good	Good	Poor	Acceptable	Poor	Poor	Acceptable	Poor	Acceptable	Poor
Bathgate	Excellent	Excellent	Good	Poor	Acceptable	Acceptable	Good	Acceptable	Good	Good	Acceptable
Broxburn	Good	Good	Good	Poor	Acceptable	Poor	Poor	Poor	Acceptable	Acceptable	Poor
East Calder	Good	Acceptable	Good	Poor	Acceptable	Acceptable	Poor	Poor	Good	Acceptable	Acceptable
Linlithgow	Excellent	Excellent	Good	Acceptable	Acceptable	Excellent	Good	Good	Good	Good	Good
Livingston	Excellent	Excellent	Excellent	Poor	Excellent	Excellent	Excellent	Good	Good	Good	Good
Whitburn	Good	Good	Good	Poor	Acceptable	Poor	Poor	Acceptable	Poor	Acceptable	Poor
Winchburgh	Good	Poor	Good	Poor	Acceptable	Poor	Acceptable	Acceptable	Poor	Acceptable	Poor

8 Retail Capacity

8.1 *Retail Capacity*

Retail capacity analysis provides the quantitative case for future retail policies and proposals, whether these are concerned with promoting floorspace or restricting floorspace. There are a number of stages which are essentially concerned with matching "demand" (available expenditure) with "supply" to generate a retail balance for the base year, taking into account the leakage of expenditure and internal expenditure flows between catchments (see Chapter 4 for details of the catchment definition process). The retail balance is projected forward based on population growth and future floorspace to generate projected retail balances for future years. These balances can be viewed as financial figures or converted to approximate floorspace opportunities. Figure 8.1 below outlines the retail capacity analysis process, which in this case generates four scenarios.

Figure 8.1: Retail Capacity Analysis Process



8.2 *Available Expenditure*

Available expenditure is the product of population and per capita expenditure by catchment and for the entire study area. Population estimates by catchment were prepared for the base year 2008, using data supplied by postcode sector by MapInfo Pitney Bowes (Appendix 3). The population estimates were delineated by catchment based on the postcode sector coverage of each catchment with further details in Appendix 5. Population estimates are below in Table 8.1.

Table 8.1: Population by Catchment, 2008 base year

Catchment	Population
Almondvale (Livingston)	64,646
Bathgate	24,705
Linlithgow (includes 1,175 from Bo'ness and surroundings)	19,000
Armadale	13,085
Broxburn	15,033
East Calder	8,792
Whitburn	24,037
Winchburgh	3,636
Total for Study Area	**172,934**

Source: Anysite Report, West Lothian, 2008, mapped by Halcrow Group Ltd

As a comparator, the 2008 population projection for West Lothian from the General Register Office Scotland (2006-based projections) is 169,342. This is 2,417 less than the population estimate employed in this study (taking into account the 1,175 extra in Bo'ness) and is a consequence of the fact that the boundaries of the study area extend slightly beyond the West Lothian council area.

Per capita expenditure estimates supplied by MapInfo Pitney Bowes by postcode sector were mapped by postcode sector against catchments and this approach allowed the identification of a weighted average per capita spend value for each catchment, with further details on the breakdown at Appendix 5. The estimates supplied ranged from £1,718 to £1,992 *per capita per annum*, but the weighted averages are higher, which is a consequence of the distribution of expenditure reflecting the demographic context of the study area and the constituent catchments. In all cases, per capita spend is at the higher end of the scale.

Table 8.2: Per Capita Spend by Catchment, 2008 (from 2005 value of prices)

Catchment	Average Per Capita Spend
Almondvale (Livingston)	£1,926
Bathgate	£1,931
Linlithgow	£1,961
Armadale	£1,966
Broxburn	£1,975
East Calder	£1,953
Whitburn	£1,940
Winchburgh	£1,941

Source: Anysite Report, West Lothian, 2008, mapped by Halcrow Group Ltd

The product of population and per capita expenditure is the available expenditure for each catchment and for the study area, referred to as total available expenditure.

Table 8.3: Available Expenditure by Catchment, 2008 base year

Catchment	Available Expenditure
Almondvale (Livingston)	£124.5m
Bathgate	£47.7m
Linlithgow	£37.3m
Armadale	£25.7m
Broxburn	£29.7m
East Calder	£17.2m
Whitburn	£46.6m
Winchburgh	£7.1m
Total Available Expenditure	**£335.7m**

Source: Tables 8.1 and 8.2

8.3 *Turnover*

Convenience goods turnover is the product of net convenience floorspace multiplied by turnover rates, for convenience goods as opposed to non-food comparison goods. Net floorspace data was extracted from the assessor's database (as supplied by West Lothian Council), and turnover rates were obtained from the 2008 issue of Retail Rankings, which provides average turnover rates for named operators. The product of floorspace multiplied by turnover rate is the turnover, both at a catchment level and aggregated for the study area, referred to as total turnover. For the purpose of this study it is assumed that floorspace is trading at national average rates and, where a turnover rate is not given, a generic rate is used.

The main turnover rates employed are listed below:

Operator	Turnover psqm Base Year 2008
• Tesco	£13,523
• ASDA	£11,177
• Sainsbury	£10,989
• Morrisons	£13,100
• Co-op/Somerfield	£6,533
• Spar	£6,689
• Farmfoods	£5,274
• Aldi	£3,518
• Lidl	£2,922
• Generic Town Centre	£3,289

Convenience floorspace and turnover by catchment is summarised below in Table 8.4. Note that the base year is 2008 from a 2006 price base, uplifted using expenditure growth rates in MapInfo Information Brief 07/2.

Table 8.4: Convenience Floorspace and Turnover by Catchment, 2008 base year

Catchment	Floorspace net sqm	Turnover
Almondvale (Livingston)	20,327	£184.7m
Bathgate	7,780	£59.9m
Linlithgow	3,967	£38.9m
Armadale	2,017	£9.7m
Broxburn	3,395	£17.6m
East Calder	266	£1.4m
Whitburn	3,617	£15.4m
Winchburgh	387	£1.6m
Total Floorspace and Turnover	**41,755**	**£329.2m**

Source: Retail Rankings 2008/Assessor's Data, mapping /analysis by Halcrow Group Ltd

8.4 *Base Year Retail Balance*

The base year retail balance is the difference between total available expenditure and total assumed turnover. This should be considered at two levels – for the entire study area, and on a catchment level.

At the higher level of the entire study area the retail balance is calculated from Table 8.3 minus Table 8.4, a positive difference of approximately £6m. At less than 2%, this can be viewed as negligible as an overall retail balance, and indicates that – for the West Lothian area – available expenditure is broadly in line with floorspace and turnover. Indeed, leakage of expenditure outwith the West Lothian area (ie to Falkirk and Edinburgh) weighed against imported expenditure from beyond West Lothian, in particular to Almondvale through linked trips, would in all likelihood account for this difference. This would indicate that there is no scope for additional floorspace in the short term.

However, the picture should be considered in more detail, at the catchment level, as in Table 8.5 below.

Table 8.5: Retail Balance by Catchment, 2008 base year

Catchment	Gross Available Expenditure	Turnover	Retail Balance
Almondvale (Livingston)	£124.5m	£184.7m	-£60.2m
Bathgate	£47.7m	£59.9m	-£12.1m
Linlithgow	£37.3m	£38.9m	-£1.7m
Armadale	£25.7m	£9.7m	£16.0m
Broxburn	£29.7m	£17.6m	£12.1m
East Calder	£17.2m	£1.4m	£15.8m
Whitburn	£46.6m	£15.4m	£31.2m
Winchburgh	£7.1m	£1.6m	£5.5m
Total	**£335.7m**	**£329.2m**	**£6.5m**

Source: Table 8.3 and Table 8.4

It is clear that there is a very varied picture at the catchment level. Almondvale (as the town centre of Livingston, the sub-regional centre) exhibits an imbalance with a retail balance nearly one third of the turnover and nearly half of the available catchment expenditure. This indicates an enormous oversupply of floorspace when matched against the availability of expenditure within the catchment. Floorspace in Almondvale must therefore be sustained by expenditure from other catchments. The same is true, to a lesser extent, of Bathgate.

In Linlithgow, turnover and expenditure are virtually in balance, indicating that floorspace and expenditure are very much self-contained, but the remaining catchments exhibit a very significant excess of available expenditure over turnover. This indicates that the floorspace within these catchments does not satisfy demand or serve the available expenditure within the catchments, and that spend is migrating to higher order centres within West Lothian. When matched against the mirroring imbalances exhibited by Almondvale and Bathgate, the picture is clearer – with the exception of Linlithgow, significant expenditure from the other catchments is sustaining extra floorspace in Almondvale (Livingston) and Bathgate.

In order to understand the internal dynamics in more detail it is necessary to factor in both leakage (ie the loss of expenditure) and the surveyed shopping patterns. The survey was described in more detail in Chapter 5, and this should be referred to if further details are required.

8.5 Base Year Retail Balance including Leakage

The following Table 8.6 summarises available gross expenditure, leakage and expenditure lost, with a revised calculation for net available expenditure.

Table 8.6: Leaked and Lost Expenditure and Net Available Expenditure, 2008 base year

Catchment	Gross Available Expenditure	Leaked		Internet		Net Available Expenditure
Almondvale (Livingston)	£124.5m	0%	£0	0%	£0	£124.5m
Bathgate	£47.7m	3.1%	£1.5m	0%	£0	£46.2m
Linlithgow	£37.3m	11%	£4.1m	2.3%	£0.84m	£32.4m
Armadale	£25.7m	4%	£1m	0%	£0	£24.7m
Broxburn	£29.7m	10%	£3m	0.7%	£0.21m	£26.5m
East Calder	£17.2m	4.7%	£0.8m	0%	£0	£16.4m
Whitburn	£46.6m	3.5%	£1.6m	0%	£0	£45m
Winchburgh[8]	£7.1m	10%	£0.7m	0.7%	£0.05m	£6.3m
Total	**£335.7m**	**3.8%**	**£12.7m**	**0.3%**	**£1.1m**	**£322m**

Source: Table 8.5 modified by survey results (Chapter 5)

Approximately 4% of available expenditure is leaked from West Lothian; however it is likely that this is balanced by an importation of spend from outside West Lothian, with the greatest loss from Linlithgow (11%) and Broxburn/Winchburgh (10%). Leakage overall is limited and the scope for clawback may be limited, particularly if leakage is linked to work trips. Internet shopping is also lost, and is included as leaked expenditure - although this could be viewed as still originating within the catchment (if it is delivered from the Almondvale ASDA, for example) it has been discounted from the available expenditure as the value is so low and as it is not possible to attribute the value to originating in a catchment or catchments. When leakage and lost trade are discounted from available expenditure, the retail balance is recalculated as -£7.2m, indicating a very small oversupply of floorspace that may be sustained by imported expenditure that is unaccounted for.

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[8] Winchburgh was not surveyed as a discrete catchment and the characteristics of Broxburn are assumed to apply to Winchburgh.

However, these minor retail balances (in terms of gross and net expenditure, tables 8.5 and 8.7) should be viewed with caution as a number of unknown factors may influence the equation:

- The amount of expenditure lost through leakage may be lower than the survey sample indicates;
- Actual turnover rates may be at variance with the national averages employed – locally derived turnover rates could be calculated, in order to arrive at a base year equilibrium, but this would be without any evidential basis; also the retail balances are so minor as to be considered negligible;
- There is no data for spend imported into the study area (ie. linked trips to Almondvale) and this will counter leakage, although this is an unknown quantum.
- The negative balance exhibited by Linlithgow is of interest and may indicate that the catchment estimate employed in this study is a small underestimate;

These factors should be borne in mind when considering the final output of the retail capacity analysis process.

Table 8.7: Retail Balance Including Leaked and Lost Expenditure, 2008 base year

Catchment	Net Available Expenditure	Turnover	Retail Balance
Almondvale (Livingston)	£124.5m	£184.7m	-£60.2m
Bathgate	£46.2m	£59.9m	-£13.7m
Linlithgow	£32.4m	£38.9m	-£6.5m
Armadale	£24.7m	£9.7m	£15m
Broxburn	£26.5m	£17.6m	£8.9m
East Calder	£16.4m	£1.4m	£15m
Whitburn	£45m	£15.4m	£29.6m
Winchburgh	£6.3m	£1.6m	£4.7m
Total	**£322m**	**£329.2m**	**-£7.2m**

Source: Table 8.5 modified by survey results (Chapter 5)

8.6 *Base Year Retail Balance with Leakage and Expenditure Flows*

It is necessary to consider expenditure flows within the study area, between catchments, in order to better understand the base year position. As with leakage, these expenditure flows are based on surveyed shopping patterns in the table below, which maps origin against destination. It should be noted that these survey results are based on household shopping patterns for the main shopping trip, applied to per capita expenditure within catchments, and this may in fact exaggerate the attraction of higher-order destinations to household-based shopping trips and underplay the spend in smaller stores. Nevertheless, for retail capacity analysis, the results provide a satisfactory indication of expenditure flows.

Table 8.8: Base Year Expenditure Flows, 2008 base year

Destination / Origin	Almondvale (Livingston)	Bathgate	Linlithgow	Armadale	Broxburn	E Calder	Whitburn	Winchburgh	Total £catchment
Almondvale (Livingston)	93% £115.8m	6% £7.5m	0%	0%	0%	0%	1% £1.2m	0%	£124.5m
Bathgate	34% £16.2m	61.9% £29.5m	0%	0%	0%	1% £0.5m	0%	0%	£46.2m
Linlithgow	4.1% £1.5m	11.2% £4.2	71.4% £26.6m	0%	0%	0%	0%	0%	£32.3m
Armadale	16.2% £4.2m	65.5% £16.9m	1.4% £0.3m	9.5% £2.4m	0%	0%	3.4% £0.9m	0%	£24.7m
Broxburn	56.4% £16.8m	8.6% £2.5m	2.1% £0.5m	0%	20.7% £6.1m	0%	1.4% £0.4m	0%	£26.3m
E Calder	93.2% £16.0m	0.7% £0.1m	0%	0%	0%	0.7% £0.1m	0.7% £0.1m	0%	£16.3m
Whitburn	42.4% £19.8m	31.9% £14.9m	1.4% £0.6m	0%	0%	0%	20.8% £9.7m	0%	£45m
Winchburgh	56.4% £4.0m	8.6% £0.6m	2.1% £0.2m	0%	20.7% £1.5m	0%	1.4% £0.1m	0%	£6.4m
Total % of total % of £catchment	£194.3m 60% 156%	£76.2m 24% 165%	£28.2m 9% 87%	£2.4m >1% 10%	£7.6m 2% 28%	£0.6m >1% 4%	£12.4m 4% 28%	£0m 0% 0%	£321.7m 100%

Source: Table 8.5 modified by survey results (Chapter 5)

The main measure of the inequality of floorspace provision is the retention of expenditure within a catchment. A summary is below:

- Almondvale (Livingston): The sub-regional centre, dominates Broxburn and East Calder. Retains 93% of expenditure and draws expenditure from all other catchments, to varying degrees, in particular 93% of East Calder's expenditure.
- Bathgate: The district centre of West Lothian, dominates Armadale and Whitburn. Spend migrates to Almondvale, but retains 62% of expenditure.
- Linlithgow: 71% self-contained with a small amount of spend migrating to Bathgate and Almondvale, and also as leakage to Falkirk and Edinburgh, likely to be linked to work trips.
- Armadale: Very poorly self-contained (9% of spend is retained) and significantly dominated by Bathgate (which takes nearly two-thirds of its expenditure) but earmarked for large-scale future housing which may alter the relationship.

- Broxburn: Dominated by Almondvale (which takes 56% of expenditure) and retaining 21% of spend, but earmarked for large-scale future housing which may alter the relationship.
- East Calder: Significantly dominated by Almondvale (which takes 93% of spend), but earmarked for large-scale future housing which may alter the relationship – the scale of development may lead to its own establishment as a retail centre. The flow of expenditure to Almondvale indicates that East Calder could be considered as a part of a wider Almondvale catchment. However, East Calder is considered separately as it has a larger existing population than Winchburgh. Nevertheless, there may be certain circumstances in which a combined Almondvale/East Calder catchment could be considered.
- Whitburn: Dominated by both Almondvale and Bathgate which take 42% and 32% of spend respectively, leaving Whitburn with retained spend of 21%. Earmarked for large-scale future housing which may alter the relationship.
- Winchburgh: treated as a sub-catchment of Broxburn for the base year, due to the limited population and shopping provision that exists at present.

It is necessary to consider the actual retail balance within each catchment ie. the spend that is retained plus the spend that is imported versus the floorspace in each catchment, reflecting the surveyed shopping habits. This is shown in Table 8.9, employing the surveyed expenditure flows from Table 8.8. Note that this does not take into account any spend imported into the system.

Table 8.9: Retail Balance 2008 base year - Expenditure Flows

Catchment	Net Available Expenditure	Turnover	Retail Balance
Almondvale (Livingston)	£194.3m	£184.7m	£9.6m
Bathgate	£76.2m	£59.9m	£16.3m
Linlithgow	£28.2m	£38.9m	-£10.7m
Armadale	£2.4m	£9.7m	-£7.3m
Broxburn	£7.6m	£17.6m	-£10m
East Calder	£0.6m	£1.4m	-£0.8m
Whitburn	£12.4m	£15.4m	-£3.2m
Winchburgh	£0m	£1.6m	-£1.6m
Total	**£321.7m**	**£329.2m**	**-£7.5m**

Source: Table 8.7 and Table 8.8

Figure 8.2 below illustrates the balance of expenditure within catchments in terms of expenditure generated, exported, imported, and leaked, from which the turnover is subtracted to generate the retail balance. Figures 8.3 and 8.4 below illustrate the flow of trade between catchments, with coloured bars indicating in which catchment expenditure is spent.

Figure 8.2: Expenditure Generated by Catchment – Generated, Imported, Lost, Turnover, Balance

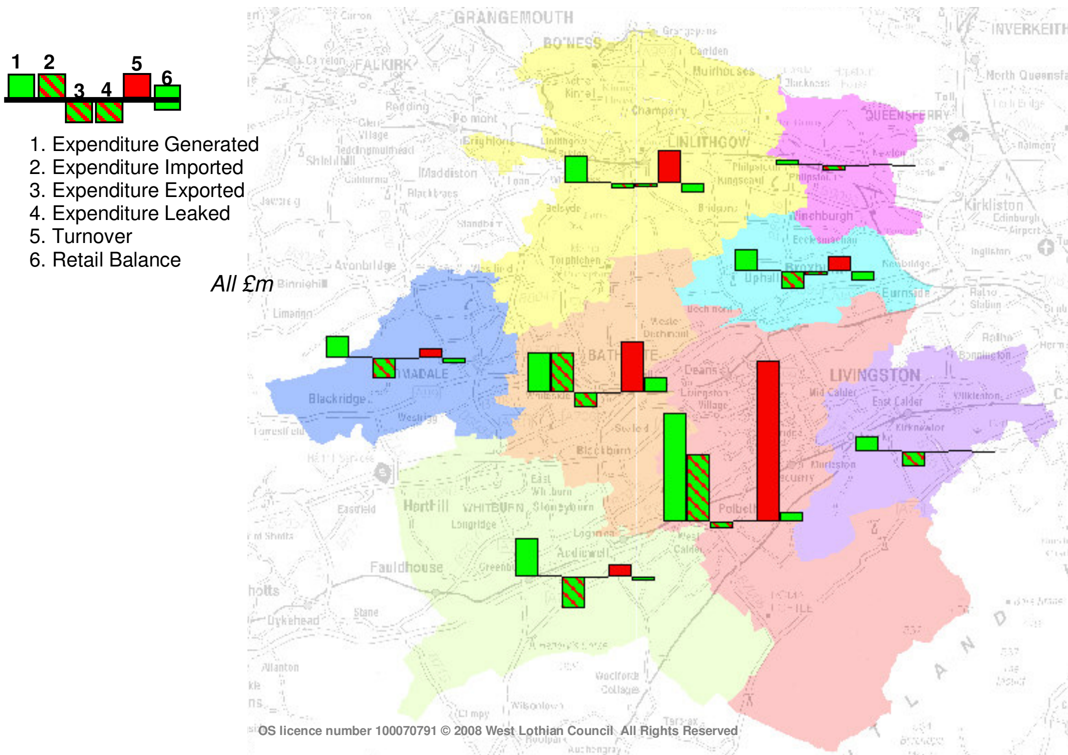


Figure 8.3: Expenditure Destination by Catchment

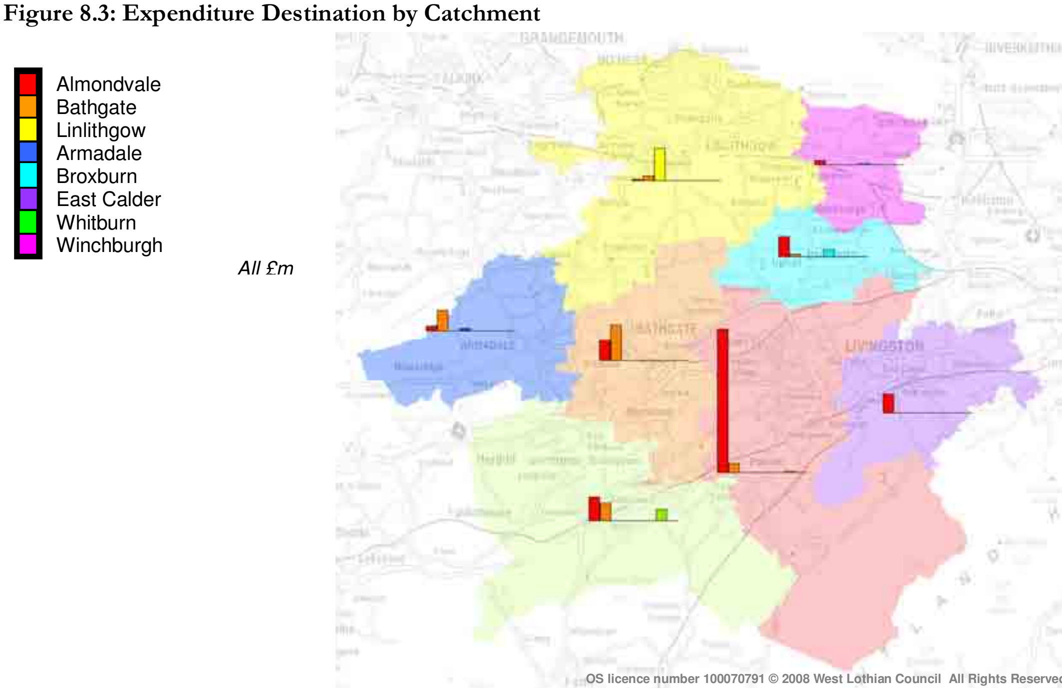
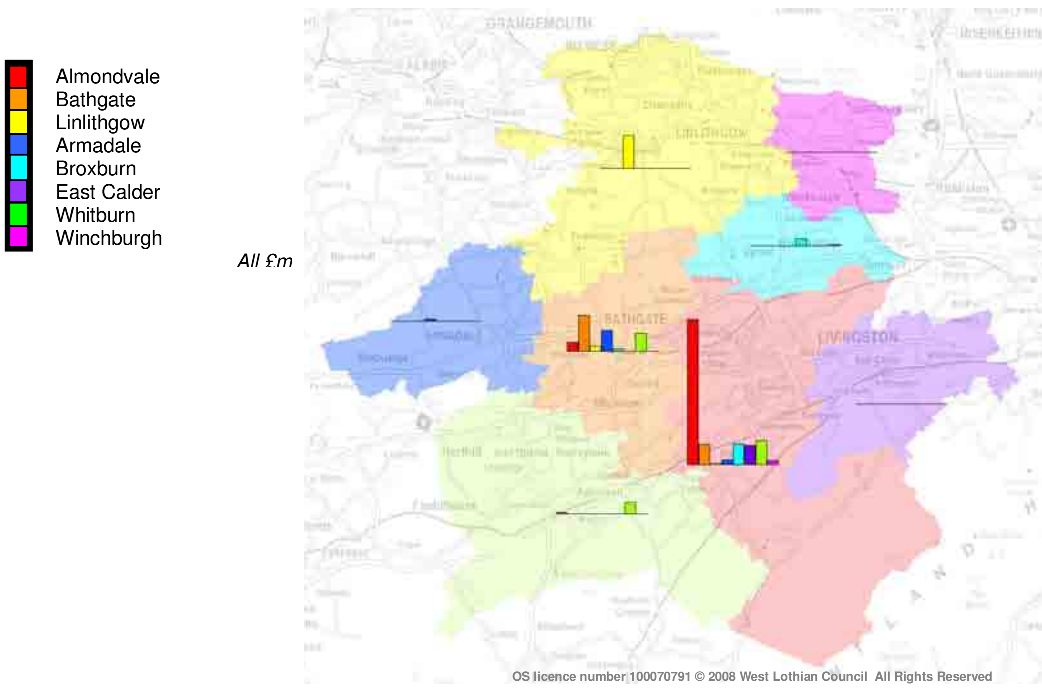


Figure 8.4: Expenditure Origin by Catchment



It is clear, from the application of surveyed expenditure flows to available expenditure, that there is an inequality of floorspace provision in West Lothian and that residents of lower order catchments are required to journey to Almondvale (Livingston) or Bathgate for shopping. This inequality needs to be addressed through targeted retention of spend within catchments balanced against the impact on those centres – Almondvale and Bathgate – that are currently attracting significant expenditure from beyond their catchment boundaries.

Therefore, a number of scenarios have been devised, considering the balance of retained and imported/exported expenditure across catchments. In all cases it is assumed that Almondvale (Livingston) will retain 93% of its catchment expenditure, but that higher order centres (Bathgate and Linlithgow) will retain more expenditure than lower order centres (Armadale, Broxburn, East Calder, Whitburn, Winchburgh). This scenario testing process allows a number of outputs to be considered and the most likely output to be taken forward for sensitivity testing and for developing recommendations for the quantitative and qualitative changes that will deliver the increased retention of spend outcomes. The four scenarios are listed below, developed for the base year in the first instance.

- Scenario 1. 93% Almondvale (Livingston)/80% Bathgate & Linlithgow/70% Others
- Scenario 2. 93% Almondvale (Livingston)/80% Bathgate & Linlithgow/65% Others
- Scenario 3. 93% Almondvale (Livingston)/80% Bathgate & Linlithgow/60% Others
- Scenario 4. 93% Almondvale (Livingston)/70% Bathgate & Linlithgow[9]/60% Others

All of these scenarios are predicated on the basis that more spend will be retained within catchments and less spend will be exported to other catchments (with the exception of Linlithgow in Scenario 4). This will require either qualitative changes (town centre improvements, new operators, increased accessibility, improved comparison goods range, improved customer service/delivery) or quantitative changes (increased floorspace), or most likely a combination of both.

As Almondvale (Livingston) and Bathgate are significant importers of expenditure, the retention of spend elsewhere will need to be balanced against the impact on both these centres. Both centres are likely to be overtrading (ie trading at above average turnover rates for these store types) and Almondvale in particular may be sustained to an extent by trade imported beyond West Lothian, ie. due to linked trips. Both of these factors are difficult to quantify and it is recommended that retail impact assessments consider in detail the impact of new floorspace on both these centres. Nevertheless, both centres will be sustained to some degree by increased population within their catchments.

[9] Linlithgow is set at 71% as per the survey results ie. no change is assumed.

8.7 *Scenario 1*

In Scenario 1, it is assumed that Almondvale (Livingston) will retain the same percentage of expenditure, but that Bathgate and Linlithgow will retain 80% expenditure with all other centres retaining 70% of expenditure. This is considered to be the most optimistic scenario notwithstanding any impact on Almondvale (Livingston) and Bathgate.

There are estimated base year net floorspace opportunities as follows:

- Almondvale (Livingston): No opportunity in the base year.
- Armadale 633 to 1,280 sqm
- Bathgate 247 to 499 sqm
- Broxburn 299 to 605 sqm
- East Calder 809 to 1,636 sqm
- Linlithgow No opportunity – relatively well self-contained.
- Whitburn 1,452 to 2,934 sqm
- Winchburgh 256 to 517 sqm

Turnover rates: £13,523 (high) and £6,533 (low).

Table 8.10a: Scenario 1: Target Expenditure Flows – 80%/70% Retention

Destination / Origin	Almondvale (Livingston)	Armadale	Bathgate	Broxburn	E Calder	Linlithgow	Whitburn	Winchburgh	Outside W Lothian
Almondvale (Livingston)	93%	0%	6%	0%	0%	0%	1%	0%	0%
Armadale	10%	70%	20%	0%	0%	0%	0%	0%	0%
Bathgate	20%	0%	80%	0%	0%	0%	0%	0%	0%
Broxburn	21%	0%	0%	70%	0%	2%	1%	0%	5%/1%
E Calder	25%	0%	0%	0%	70%	0%	0%	0%	5%
Linlithgow	5%	0%	8%	0%	0%	80%	0%	0%	5%/2%
Whitburn	10%	0%	20%	0%	0%	0%	70%	0%	0%
Winchburgh	13%	0%	0%	10%	0%	0%	1%	70%	5%/1%

Table 8.10b: Scenario 1: Retail Balance – 80%/70% Retention

Catchment	***Gross Available Expenditure***	***Leaked/ Lost***	***Net Available Expenditure***	***Retained Net Expenditure***	***Imported Net Expenditure***	***Turnover***	***Retail Balance***
Almondvale (Livingston)	£124.5m	£0.0m	£124.5m	£115.8m	£30.1m	£184.7m	-£38.9m
Armadale	£25.7m	£0.0m	£25.7m	£18.0m	£0.0m	£9.7m	£8.3m
Bathgate	£47.7m	£0.0m	£47.7m	£38.2m	£24.9m	£59.9m	£3.2m
Broxburn	£29.7m	£1.6m	£28.1m	£20.8m	£0.7m	£17.6m	£3.9m
East Calder	£17.2m	£0.9m	£16.3m	£12.0m	£0.0m	£1.4m	£10.6m
Linlithgow	£37.3m	£2.6m	£34.6m	£29.8m	£0.6m	£38.9m	-£8.5m
Whitburn	£46.7m	£0.0m	£46.6m	£32.6m	£1.8m	£15.4m	£19.0m
Winchburgh	£7.1m	£0.4m	£6.7m	£4.9m	£0.0m	£1.6m	£3.3m
TOTALS	**£335.7m**	**£5.5m**	**£330.2m**	**£272.1m**	**£58.1m**	**£329.2m**	**£1.1m**

Source: Table 8.7 and Table 8.8 (modified)

8.8 ***Scenario 2***

In Scenario 2, it is assumed that Almondvale (Livingston) will retain the same percentage of expenditure, but that Bathgate and Linlithgow will retain 80% expenditure with all other centres retaining 65% of expenditure. This is considered to be the upper of two medium case scenarios notwithstanding any impact on Almondvale (Livingston) and Bathgate.

There are estimated base year net floorspace opportunities as follows:

- Almondvale (Livingston): No opportunity in the base year.
- Armadale 535 to 1,081 sqm
- Bathgate 247 to 499 sqm
- Broxburn 186 to 376 sqm
- East Calder 744 to 1,504 sqm
- Linlithgow No opportunity – relatively well self-contained.
- Whitburn 1,273 to 2,575 sqm
- Winchburgh 229 to 462 sqm

Turnover rates: £13,523 (high) and £6,533 (low).

Table 8.11a: Scenario 2: Target Expenditure Flows – 80%/65% Retention

Destination Origin	Almondvale (Livingston)	Armadale	Bathgate	Broxburn	E Calder	Linlithgow	Whitburn	Winchburgh	Outside W Lothian
Almondvale (Livingston)	93%	0%	6%	0%	0%	0%	1%	0%	0%
Armadale	15%	65%	20%	0%	0%	0%	0%	0%	0%
Bathgate	20%	0%	80%	0%	0%	0%	0%	0%	0%
Broxburn	26%	0%	0%	65%	0%	2%	1%	0%	5%/1%
E Calder	30%	0%	0%	0%	65%	0%	0%	0%	5%
Linlithgow	5%	0%	8%	0%	0%	80%	0%	0%	5%/2%
Whitburn	15%	0%	20%	0%	0%	0%	65%	0%	0%
Winchburgh	15%	0%	0%	10%	0%	0%	1%	65%	8%/1%

Table 8.11b: Scenario 2: Base Year Retail Balance – 80%/65% Retention

Catchment	***Gross Available Expenditure***	***Leaked/ Lost***	***Net Available Expenditure***	***Retained Net Expenditure***	***Imported Net Expenditure***	***Turnover***	***Retail Balance***
Almondvale (Livingston)	£124.5m	£0.0m	£124.5m	£115.8m	£36.2m	£184.7m	-£32.8m
Armadale	£25.7m	£0.0m	£25.7m	£16.7m	£0.0m	£9.7m	£7.0m
Bathgate	£47.7m	£0.0m	£47.7m	£38.2m	£24.9m	£59.9m	£3.2m
Broxburn	£29.7m	£1.7m	£28.0m	£19.3m	£0.7m	£17.6m	£2.4m
East Calder	£17.2m	£0.9m	£16.3m	£11.2m	£0.0m	£1.4m	£9.7m
Linlithgow	£37.3m	£2.7m	£34.5m	£29.8m	£0.6m	£38.9m	-£8.5m
Whitburn	£46.7m	£0.0m	£46.6m	£30.3m	£1.8m	£15.4m	£16.7m
Winchburgh	£7.1m	£0.6m	£6.4m	£4.6m	£0.0m	£1.6m	£3.0m
TOTALS	**£335.7m**	**£5.9m**	**£329.8m**	**£265.8m**	**£64.2m**	**£329.2m**	**£0.8m**

Source: Table 8.7 and Table 8.8 (modified)

8.9 *Scenario 3*

In Scenario 3, it is assumed that Almondvale (Livingston) will retain the same percentage of expenditure, but that Bathgate and Linlithgow will retain 80% expenditure with all other centres retaining 60% of expenditure. This is considered to be the lower of two medium case scenarios notwithstanding any impact on Almondvale (Livingston) and Bathgate.

There are estimated base year net floorspace opportunities as follows:

- Almondvale (Livingston): No opportunity in the base year.
- Armadale 437 to 883 sqm
- Bathgate 523 to 1,057sqm
- Broxburn 73 to 147 sqm
- East Calder 678 to 1,371 sqm
- Linlithgow No opportunity – relatively well self-contained.
- Whitburn 1,095 to 2,215 sqm
- Winchburgh 202 to 408 sqm

Turnover rates: £13,523 (high) and £6,533 (low).

Table 8.12a: Scenario 3: Target Expenditure Flows – 80%/60% Retention

Destination / Origin	Almondvale (Livingston)	Armadale	Bathgate	Broxburn	E Calder	Linlithgow	Whitburn	Winchburgh	Outside W Lothian
Almondvale (Livingston)	93%	0%	6%	0%	0%	0%	1%	0%	0%
Armadale	15%	60%	25%	0%	0%	0%	0%	0%	0%
Bathgate	20%	0%	80%	0%	0%	0%	0%	0%	0%
Broxburn	31%	0%	0%	60%	0%	2%	1%	0%	5%/1%
E Calder	35%	0%	0%	0%	60%	0%	0%	0%	5%
Linlithgow	5%	0%	8%	0%	0%	80%	0%	0%	5%/2%
Whitburn	15%	0%	25%	0%	0%	0%	60%	0%	0%
Winchburgh	20%	0%	0%	13%	0%	0%	1%	60%	5%/1%

Table 8.12b: Scenario 3: Base Year Retail Balance – 80%/60% Retention

Catchment	Gross Available Expenditure	Leaked/ Lost	Net Available Expenditure	Retained Net Expenditure	Imported Net Expenditure	Turnover	Retail Balance
Almondvale (Livingston)	£124.5m	£0.0m	£124.5m	£115.8m	£38.0m	£184.7m	-£30.9m
Armadale	£25.7m	£0.0m	£25.7m	£15.4m	£0.0m	£9.7m	£5.7m
Bathgate	£47.7m	£0.0m	£47.7m	£38.2m	£28.5m	£59.9m	£6.9m
Broxburn	£29.7m	£1.7m	£28.0m	£17.8m	£0.7m	£17.6m	£1.0m
East Calder	£17.2m	£1.7m	£15.5m	£10.3m	£0.0m	£1.4m	£8.9m
Linlithgow	£37.3m	£2.7m	£34.5m	£29.8m	£0.6m	£38.9m	-£8.5m
Whitburn	£46.7m	£0.0m	£46.6m	£28.0m	£1.8m	£15.4m	£14.4m
Winchburgh	£7.1m	£0.6m	£6.4m	£4.2m	£0.0m	£1.6m	£2.6m
TOTALS	**£335.7m**	**£6.7m**	**£329.0m**	**£259.5m**	**£69.7m**	**£329.2m**	**-£0.0m**

Source: Table 8.7 and Table 8.8 (modified)

8.10 ***Scenario 4***

In Scenario 4, it is assumed that Almondvale (Livingston) will retain the same percentage of expenditure, but that Bathgate and Linlithgow will retain 70% expenditure with all other centres retaining 60% of expenditure. This is considered to be the lower of two medium case scenarios notwithstanding any impact on Almondvale (Livingston) and Bathgate.

There are estimated base year net floorspace opportunities as follows:

- Almondvale (Livingston): No opportunity in the base year.
- Armadale 437 to 883 sqm
- Bathgate 216 to 436 sqm
- Broxburn 73 to 147 sqm
- East Calder 678 to 1,371 sqm
- Linlithgow No opportunity – relatively well self-contained.
- Whitburn 1,095 to 2,215 sqm
- Winchburgh 202 to 408 sqm

Turnover rates: £13,523 (high) and £6,533 (low).

Table 8.13a: Scenario 4: Target Expenditure Flows – 70%/60% Retention

Destination / Origin	Almondvale (Livingston)	Armadale	Bathgate	Broxburn	E Calder	Linlithgow	Whitburn	Winchburgh	Outside W Lothian
Almondvale (Livingston)	93%	0%	6%	0%	0%	0%	1%	0%	0%
Armadale	15%	60%	25%	0%	0%	0%	0%	0%	0%
Bathgate	30%	0%	70%	0%	0%	0%	0%	0%	0%
Broxburn	31%	0%	0%	60%	0%	2%	1%	0%	10%/1%
E Calder	30%	0%	0%	0%	60%	0%	0%	0%	5%
Linlithgow	7%	0%	10%	0%	0%	71%	0%	0%	10%/2%
Whitburn	15%	0%	25%	0%	0%	0%	60%	0%	0%
Winchburgh	20%	0%	0%	10%	0%	0%	1%	60%	8%/1%

Table 8.13b: Scenario 4: Base Year Retail Balance – 70%/60% Retention

Catchment	Gross Available Expenditure	Leaked/ Lost	Net Available Expenditure	Retained Net Expenditure	Imported Net Expenditure	Turnover	Retail Balance
Almondvale (Livingston)	£124.5m	£0.0m	£124.5m	£115.8m	£43.5m	£184.7m	-£25.4m
Armadale	£25.7m	£0.0m	£25.7m	£15.4m	£0.0m	£9.7m	£5.7m
Bathgate	£47.7m	£0.0m	£47.7m	£33.4m	£29.3m	£59.9m	£2.8m
Broxburn	£29.7m	£1.7m	£28.0m	£17.8m	£0.7m	£17.6m	£1.0m
East Calder	£17.2m	£1.7m	£15.5m	£10.3m	£0.0m	£1.4m	£8.9m
Linlithgow	£37.3m	£4.6m	£32.7m	£26.4m	£0.6m	£38.9m	-£11.8m
Whitburn	£46.7m	£0.0m	£46.6m	£28.0m	£1.8m	£15.4m	£14.4m
Winchburgh	£7.1m	£0.6m	£6.4m	£4.2m	£0.0m	£1.6m	£2.6m
TOTALS	**£335.7m**	**£8.6m**	**£327.1m**	**£251.4m**	**£75.9m**	**£329.2m**	**-£1.9m**

Source: Table 8.7 and Table 8.8 (modified)

8.11 ***Summary – Base Year Scenarios 1 to 4***

The four base year scenarios point to different floorspace opportunities that could deliver different retentions of expenditure at the catchment level. As stated earlier, the balance between retained expenditure and the support of higher order centres at Almondvale (Livingston) must be considered. In all cases, however, the following is evident:

- There is no retail capacity within Almondvale in the base year.
- There is no retail capacity within Linlithgow in the base year.
- All other catchments exhibit some degree of retail capacity.
- There will be some degree of retail impact on Almondvale, ranging from a change from a positive retail balance of approximately £9million (as exists currently) to a negative retail balance ranging from -£39million to -£25million. As the total turnover within the catchment is £184million, this would be an impact of between 14% and 17%, if it is assumed that the £9million positive balance is due to overtrading.

It is necessary to consider both future retail capacity and consented floorspace to ascertain the overall scope for floorspace opportunities and the mitigation of reduced imported spend by additional demand from housing and population increase.

8.12 ***Future Retail Capacity to 2026***

Future retail capacity will be generated primarily through additional demand arising from the housing allocations, extracted from the Council's housing model. The housing allocations are converted to population equivalent figures using average household size, and this method offers some advantage over the traditional retail capacity methodology as it identifies specific areas in which there will be population growth, rather than applying a projected growth rate across an entire study area or across catchments on a pro-rata basis. There is a small additional expenditure growth rate of 1.2% per annum (long-term growth) but this is matched in part by an assumed increase in turnover efficiency of 1% per annum.

8.12.1 ***Future Population to 2026***

Future population has been taken from the Council's housing model and added to the base year population, according to the phasing of the allocated sites, using an equivalent household population rate from General Register Office Scotland 2006-

based projections for West Lothian. This method allows precise allocation of future demand based upon housing allocations rather than trend-based population projections, but it assumes that build rates will occur as phased in the audit. In practice, this may not be the case, and there will be future housing allocations following the new Strategic Development Plan and future Local Development Plans. Nevertheless, these figures allow greater spatial precision than population projections and have their basis in housing land policy. Note that there are no programmed housing completions beyond 2025. Table 8.14 below details the forecast change.

The overall change is 48,000 persons or just under 21,500 households – a 28% population increase over the period. This forecast is from a base year of 2008 so discounts housing completions in the audit year 2006/2007 and phased completions for 2007/2008.[10] It is assumed that population changes in the neighbouring local authorities – and the resultant additional demand – will be balanced by floorspace increases in those areas and that the balance with West Lothian will not change.

This is a long-term forecast, albeit based upon robust housing policies rather than trend based projections. Therefore, this study should be reviewed and updated as new housing allocations are made, and this will particularly impact upon the period beyond 2021. It may be the case that retail capacity estimates can be revised upwards. Ongoing monitoring and modification can also be carried out against the annual Housing Land Audit.

[10] The remaining land supply from the Housing Land Model is 24,145 units (West Lothian Council Housing Land Model, December 2007).

Table 8.14: Forecast Population Change

Population Change	Base Year 2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Av HH size		2.32	2.31	2.30	2.29	2.27	2.26	2.25	2.24	2.23	2.22
Almondvale (Livingston)	64,646	65,199	66,068	67,090	67,973	68,495	68,982	69,432	69,835	70,214	70,592
Armadale	13,085	13,362	13,609	14,205	14,804	15,419	16,130	16,761	17,343	17,923	18,331
Bathgate	24,705	25,946	27,019	27,895	28,696	29,400	29,810	30,154	30,188	30,188	30,208
Broxburn	15,033	15,140	15,322	15,683	16,416	17,317	18,234	19,180	19,997	20,566	21,076
East Calder	8,792	8,848	8,984	9,205	9,445	9,911	10,386	10,859	11,273	11,797	12,297
Linlithgow	19,000	19,084	19,195	19,229	19,273	19,286	19,332	19,390	19,390	19,390	19,390
Whitburn	24,037	24,185	24,599	25,094	25,634	26,174	26,873	27,459	27,851	28,208	28,541
Winchburgh	3,636	3,641	3,645	3,783	4,035	4,432	5,089	5,710	6,248	6,806	7,361
TOTALS	**172,934**	**175,404**	**178,442**	**182,184**	**186,275**	**190,434**	**194,835**	**198,945**	**202,126**	**205,091**	**207,795**

Population Change	2019	2020	2021	2022	2023	2024	2025	2026
Av HH size	2.21	2.20	2.19	2.18	2.17	2.16	2.15	2.14
Almondvale (Livingston)	70,923	71,275	71,637	71,964	72,235	72,505	72,612	72,612
Armadale	18,619	18,905	19,124	19,364	19,537	19,667	19,796	19,796
Bathgate	30,228	30,263	30,285	30,285	30,285	30,285	30,285	30,285
Broxburn	21,585	22,003	22,244	22,483	22,592	22,657	22,657	22,657
East Calder	12,794	13,234	13,672	14,108	14,488	14,866	15,081	15,081
Linlithgow	19,390	19,390	19,390	19,390	19,390	19,390	19,390	19,390
Whitburn	28,872	29,202	29,531	29,858	30,075	30,291	30,441	30,441
Winchburgh	7,937	8,597	9,254	9,856	10,399	10,753	10,944	10,944
TOTALS	**210,348**	**212,869**	**215,136**	**217,307**	**219,000**	**220,412**	**221,206**	**221,206**

Source: West Lothian Council Housing Model 2007, mapped by Halcrow Group Limited, and General Register Office Scotland 2006-based household size projections

8.13 ***Future Expenditure to 2026***

Net available expenditure within each catchment is the product of population (table 8.14 above) multiplied by per capita spend, which is uplifted by 1.2% per annum from the base year to account for expenditure growth, and shown below in Table 8.15.

Table 8.15: Forecast Per Capita Expenditure

Per Capita Spend	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Almondvale (Livingston)	£1,926	£1,949	£1,972	£1,996	£2,020	£2,044	£2,068	£2,093	£2,118	£2,144
Bathgate	£1,931	£1,990	£2,013	£2,038	£2,062	£2,087	£2,112	£2,137	£2,163	£2,189
Linlithgow	£1,961	£1,954	£1,978	£2,001	£2,025	£2,050	£2,074	£2,099	£2,124	£2,150
Armadale	£1,966	£1,998	£2,022	£2,047	£2,071	£2,096	£2,121	£2,147	£2,172	£2,198
Broxburn	£1,975	£1,977	£2,000	£2,024	£2,049	£2,073	£2,098	£2,123	£2,149	£2,175
East Calder	£1,953	£1,984	£2,008	£2,032	£2,056	£2,081	£2,106	£2,131	£2,157	£2,183
Whitburn	£1,940	£1,964	£1,987	£2,011	£2,035	£2,060	£2,084	£2,109	£2,135	£2,160
Winchburgh	£1,941	£1,964	£1,988	£2,012	£2,036	£2,060	£2,085	£2,110	£2,135	£2,161

Per Capita Spend	2018	2019	2020	2021	2022	2023	2024	2025	2026
Almondvale (Livingston)	£2,169	£2,196	£2,222	£2,249	£2,276	£2,303	£2,330	£2,358	£2,387
Bathgate	£2,215	£2,242	£2,269	£2,296	£2,323	£2,351	£2,379	£2,408	£2,437
Linlithgow	£2,176	£2,202	£2,228	£2,255	£2,282	£2,309	£2,337	£2,365	£2,394
Armadale	£2,225	£2,252	£2,279	£2,306	£2,334	£2,362	£2,390	£2,419	£2,448
Broxburn	£2,201	£2,227	£2,254	£2,281	£2,308	£2,336	£2,364	£2,392	£2,421
East Calder	£2,209	£2,236	£2,262	£2,289	£2,317	£2,345	£2,373	£2,401	£2,430
Whitburn	£2,186	£2,212	£2,239	£2,266	£2,293	£2,320	£2,348	£2,377	£2,405
Winchburgh	£2,187	£2,213	£2,240	£2,267	£2,294	£2,321	£2,349	£2,377	£2,406

Source: Table 8.2, modified by 1.2% per annum (expenditure growth)

8.13.1 ***Future Floorspace and Turnover to 2026***

Future floorspace figures have been obtained from West Lothian Council, based on identified future consents. These are summarised below and are factored into the future retail capacity calculations.

Almondvale (Livingston): estimated £13.5m turnover generated by the Almondvale "The Elements" expansion, attributable to M&S foodstore floorspace (approx 90,000 sqft gross). This floorspace opened in late 2008, and is incl5ded in the study from 2009 onwards.

- Total floor area of M&S: 90,000sqft = 8,361sqm
- Convenience goods net floor area = 1,200 sqm
- Turnover rate = £11,290 psqm (M&S 2008)

Bathgate: estimated £38.12m turnover generated by a combination of 2,500 sqm on the Edgar Allen site (£34.07m) and 600 sqm at Wester Inch (£4.05m). Design year assumed as 2011.

- **Edgar Allen:** 2,500 m net convenience goods
- Turnover rate = £13,631 psqm (Tesco 2008 uplifted to 2011)
- **Wester Inch:** 600 m net convenience goods (upper limit)
- Assumed only 1 of 2 Wester Inch stores will be for convenience.
- Turnover rate = £6,743 (Spar 2008 uplifted to 2011)

Whitburn: estimated £23.17m turnover generated by 2,000 sqm of Class 1 retail floorspace at Heartlands as part of a new neighbourhood centre with the design year assumed as 2011.

- Assumed 2,000 is net floorspace
- Assumed 15% comparison = 1,700 sqm
- Turnover rate = £13,631 psqm (Tesco 2008 uplifted to 2011)

Turnover is forecast to grow by 1% per annum plus additional turnover generated by the floorspace detailed above. Forecast turnovers are below in Table 8.16.

8.13.2 ***Future Retail Capacity***

As for the base year, retail capacity is the difference between available expenditure and turnover, calculated on an annual basis from the 2008 base year to 2026, using the expenditure flows in each of the four scenarios, and summarised in tables 8.17 to 8.20, looking at the years of 2011, 2016, 2021 and 2026 in particular.

Table 8.16: Forecast Turnover

Turnover	Base Year 2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Almondvale (Livingston)	£184.72m	£200.06m	£202.06m	£204.09m	£206.13m	£208.19m	£210.27m	£212.37m	£214.50m	£216.64m
Armadale	£9.72m	£9.81m	£9.91m	£10.01m	£10.11m	£10.21m	£10.31m	£10.42m	£10.52m	£10.63m
Bathgate	£59.85m	£60.45m	£61.06m	£95.74m	£96.69m	£97.66m	£98.64m	£99.62m	£100.62m	£101.63m
Broxburn	£17.56m	£17.74m	£17.92m	£18.10m	£18.28m	£18.46m	£18.64m	£18.83m	£19.02m	£19.21m
East Calder	£1.42m	£1.43m	£1.44m	£1.46m	£1.47m	£1.49m	£1.50m	£1.52m	£1.53m	£1.55m
Linlithgow	£38.93m	£39.32m	£39.71m	£40.11m	£40.51m	£40.92m	£41.33m	£41.74m	£42.16m	£42.58m
Whitburn	£15.40m	£15.56m	£15.71m	£39.04m	£39.43m	£39.82m	£40.22m	£40.62m	£41.03m	£41.44m
Winchburgh	£1.59m	£1.61m	£1.63m	£1.64m	£1.66m	£1.67m	£1.69m	£1.71m	£1.73m	£1.74m
TOTALS	**£329.19m**	**£345.98m**	**£349.44m**	**£410.18m**	**£414.28m**	**£418.42m**	**£422.61m**	**£426.83m**	**£431.10m**	**£435.41m**

Turnover	2018	2019	2020	2021	2022	2023	2024	2025	2026
Almondvale (Livingston)	£218.81m	£221.00m	£223.21m	£225.44m	£227.69m	£229.97m	£232.27m	£234.59m	£236.94m
Armadale	£10.73m	£10.84m	£10.95m	£11.06m	£11.17m	£11.28m	£11.39m	£11.51m	£11.62m
Bathgate	£102.64m	£103.67m	£104.71m	£105.75m	£106.81m	£107.88m	£108.96m	£110.05m	£111.15m
Broxburn	£19.40m	£19.60m	£19.79m	£19.99m	£20.19m	£20.39m	£20.59m	£20.80m	£21.01m
East Calder	£1.56m	£1.58m	£1.60m	£1.61m	£1.63m	£1.64m	£1.66m	£1.68m	£1.69m
Linlithgow	£43.00m	£43.43m	£43.87m	£44.31m	£44.75m	£45.20m	£45.65m	£46.11m	£46.57m
Whitburn	£41.85m	£42.27m	£42.70m	£43.12m	£43.55m	£43.99m	£44.43m	£44.87m	£45.32m
Winchburgh	£1.76m	£1.78m	£1.80m	£1.81m	£1.83m	£1.85m	£1.87m	£1.89m	£1.91m
TOTALS	**£439.77m**	**£444.16m**	**£448.60m**	**£453.09m**	**£457.62m**	**£462.20m**	**£466.82m**	**£471.49m**	**£476.20m**

Source: Table 8.4, modified by 1% per annum (efficiency) and additional floorspace (para 8.13.1)

Table 8.17: Forecast Retail Balance and Net Floorspace Opportunity – Scenario 1: 80%/70% Retention

Scenario 1	2011	2016	2021	2026	2011 sqm		2016 sqm		2021 sqm		2026 sqm	
Almondvale (Livingston)	-£46.1m	-£35.4m	-£27.4m	-£22.6m	0	0	0	0	0	0	0	0
Armadale	£10.3m	£15.7m	£19.7m	£22.1m	759	1,535	1,109	2,243	1,320	2,668	1,413	2,857
Bathgate	-£24.0m	-£17.7m	-£15.7m	-£14.7m	0	0	0	0	0	0	0	0
Broxburn	£5.1m	£12.7m	£18.0m	£20.4m	380	769	897	1,813	1,208	2,442	1,305	2,637
East Calder	£11.6m	£15.4m	£20.2m	£23.9m	858	1,735	1,087	2,198	1,356	2,741	1,523	3,079
Linlithgow	-£8.2m	-£7.8m	-£7.7m	-£7.7m	0	0	0	0	0	0	0	0
Whitburn	-£1.8m	£2.9m	£6.4m	£8.8m	0	0	203	410	426	862	563	1,139
Winchburgh	£3.7m	£7.6m	£12.9m	£16.5m	273	552	537	1,085	863	1,745	1,055	2,132
Total	**-£49.5m**	**-£6.5m**	**£26.3m**	**£46.9m**	**2,271**	**4,592**	**3,833**	**7,749**	**5,173**	**10,459**	**5,859**	**11,844**

Source: Table 8.10a and Table 8.15, modified by 1% per annum (turnover) and 1.2% per annum (expenditure growth)

Turnover rates:
2011: £13,497 (high) and £6,676 (low)
2016: £14,185 (high) and £7,017 (low)
2021: £14,707 (high) and £7,375 (low)
2026: £15,670 (high) and £7,751 (low)

Table 8.18: Forecast Retail Balance and Net Floorspace Opportunity – Scenario 2: 80%/65% Retention

Scenario 2	2011	2016	2021	2026	2011 sqm		2016 sqm		2021 sqm		2026 sqm	
Almondvale (Livingston)	-£39.5m	-£26.9m	-£17.3m	-£11.4m	0	0	0	0	0	0	0	0
Armadale	£8.8m	£13.9m	£17.5m	£19.7m	652	1,319	977	1,975	1,172	2,370	1,259	2,546
Bathgate	-£24.0m	-£17.7m	-£15.7m	-£14.7m	0	0	0	0	0	0	0	0
Broxburn	£3.5m	£10.6m	£15.4m	£17.7m	261	529	744	1,504	1,036	2,095	1,128	2,280
East Calder	£10.7m	£14.2m	£18.7m	£22.0m	789	1,596	1,002	2,025	1,251	2,530	1,406	2,843
Linlithgow	-£8.2m	-£7.8m	-£7.7m	-£7.7m	0	0	0	0	0	0	0	0
Whitburn	-£4.3m	-£0.1m	£3.0m	£5.2m	0	0	0	0	202	408	330	667
Winchburgh	£3.3m	£6.9m	£11.8m	£15.2m	245	495	490	990	793	1,603	971	1,962
Total	-£49.7m	-£6.9m	£25.7m	£46.1m	**1,948**	**3,938**	**3,213**	**6,495**	**4,455**	**9,006**	**5,094**	**10,298**

Source: Table 8.11a and Table 8.15, modified by 1% per annum (turnover) and 1.2% per annum (expenditure growth)

Turnover rates:
2011: £13,497 (high) and £6,676 (low)
2016: £14,185 (high) and £7,017 (low)
2021: £14,707 (high) and £7,375 (low)
2026: £15,670 (high) and £7,751 (low)

Table 8.19: Forecast Retail Balance and Net Floorspace Opportunity – Scenario 3: 80%/60% Retention

Scenario 3	2011	2016	2021	2026	2011 sqm		2016 sqm		2021 sqm		2026 sqm	
Almondvale (Livingston)	-£37.5m	-£24.1m	-£13.7m	-£7.3m	0	0	0	0	0	0	0	0
Armadale	£7.4m	£12.0m	£15.3m	£17.3m	545	1,102	845	1,708	1,025	2,073	1,105	2,235
Bathgate	-£20.1m	-£12.9m	-£10.2m	-£8.6m	0	0	0	0	0	0	0	0
Broxburn	£1.9m	£8.4m	£12.9m	£14.9m	143	288	591	1,194	864	1,747	951	1,922
East Calder	£9.7m	£13.0m	£17.1m	£20.2m	720	1,456	916	1,853	1,147	2,318	1,290	2,608
Linlithgow	-£8.2m	-£7.8m	-£7.7m	-£7.7m	0	0	0	0	0	0	0	0
Whitburn	-£6.9m	-£3.1m	-£0.3m	£1.5m	0	0	0	0	0	0	96	194
Winchburgh	£2.9m	£6.3m	£10.8m	£13.9m	217	438	443	895	723	1,461	887	1,792
Total	-£50.6m	-£8.1m	£24.1m	£44.2m	**1,625**	**3,284**	**2,795**	**5,650**	**3,759**	**7,599**	**4,329**	**8,751**

Source: Table 8.12a and Table 8.15, modified by 1% per annum (turnover) and 1.2% per annum (expenditure growth)

Turnover rates:
2011: £13,497 (high) and £6,676 (low)
2016: £14,185 (high) and £7,017 (low)
2021: £14,707 (high) and £7,375 (low)
2026: £15,670 (high) and £7,751 (low)

Table 8.20: Forecast Retail Balance and Net Floorspace Opportunity – Scenario 4: 70%/60% Retention

Scenario 4	2011	2016	2021	2026	2011 sqm		2016 sqm		2021 sqm		2026 sqm	
Almondvale (Livingston)	-£31.1m	-£16.8m	-£6.0m	£0.9m	0	0	0	0	0	0	58	117
Armadale	£7.4m	£12.0m	£15.3m	£17.3m	545	1,102	845	1,708	1,025	2,073	1,105	2,235
Bathgate	-£24.9m	-£18.4m	-£16.1m	-£14.9m	0	0	0	0	0	0	0	0
Broxburn	£1.9m	£8.4m	£12.9m	£14.9m	143	288	591	1,194	864	1,747	951	1,922
East Calder	£9.7m	£13.0m	£17.1m	£20.2m	720	1,456	916	1,853	1,147	2,318	1,290	2,608
Linlithgow	-£11.7m	-£11.5m	-£11.7m	-£11.9m	0	0	0	0	0	0	0	0
Whitburn	-£6.9m	-£3.1m	-£0.3m	£1.5m	0	0	0	0	0	0	96	194
Winchburgh	£2.9m	£6.3m	£10.8m	£13.9m	217	438	443	895	723	1,461	887	1,792
Total	-£52.6m	-£10.2m	£21.9m	£41.9m	**1,625**	**3,284**	**2,795**	**5,650**	**3,759**	**7,599**	**4,387**	**8,868**

Source: Table 8.13a and Table 8.15, modified by 1% per annum (turnover) and 1.2% per annum (expenditure growth)

Turnover rates:
2011: £13,497 (high) and £6,676 (low)
2016: £14,185 (high) and £7,017 (low)
2021: £14,707 (high) and £7,375 (low)
2026: £15,670 (high) and £7,751 (low)

8.14 ***Scenario Results***

8.14.1 *Scenario 1*

Scenario 1 would deliver the most floorspace but at possible risk to the vitality and viability of Almondvale (Livingston) (negative retail balance of -£23m by 2026) and Bathgate (-£14m by 2026). This is around 10% of turnover for Almondvale and 13% for Bathgate. This scenario will deliver most floorspace for those catchments in need but may undermine Almondvale and Bathgate and should be viewed with caution. However, East Calder could be viewed as a sub-catchment of Almondvale to mitigate the impact under certain circumstances, with East Calder viewed as an appropriate location for modest floorspace in the medium-to-long term; alternatively the impact on Almondvale could be accepted. The same principle could be applied to either Armadale or Whitburn to mitigate any impact on Bathgate.

8.14.2 *Scenario 2*

This would deliver less floorspace and retain less spend within catchments than Scenario 1. The negative balance is -£11m for a horizon year of 2026. Bathgate is -£14m. This is around 5% of Almondvale turnover and 13% of Bathgate turnover. This scenario will deliver more floorspace than scenarios 3 and 4 for those catchments in need, and will undermine Almondvale to a lesser degree, but will still have the same potential impact on Bathgate and should be viewed with caution. However, East Calder could be viewed as a sub-catchment of Almondvale to mitigate the impact under certain circumstances, with East Calder viewed as an appropriate location for only modest floorspace in the medium-to-long term pending; alternatively the potential impact on Almondvale could be accepted. The same principle could be applied to either Armadale or Whitburn to mitigate any impact on Bathgate.

8.14.3 *Scenario 3*

This would deliver less floorspace and retain less spend within catchments in need than scenarios 1 or 2. The potential impact on Almondvale (Livingston) is lessened (negative balance of -£7m, 3% of turnover) as is the potential impact on Bathgate (-£8m, 7% of turnover). East Calder could be viewed as a sub-catchment of Almondvale to reduce the impact, with East Calder viewed as an appropriate location for only modest floorspace in the medium-to-long term; alternatively the potential impact on Almondvale could be accepted, particularly as this is less than the preceding scenarios. The same principle could be applied to either Armadale or Whitburn to mitigate any impact on Bathgate.

8.14.4 *Scenario 4*

This would deliver the least floorspace and retain the least spend with the minimum differential between medium level and lower order catchments, based on the 70%-60% split. The potential impact on Almondvale (Livingston) is reduced to nearly zero. There is a more significant potential negative impact on Bathgate (-£14m) than in scenario 3, and this factor – coupled with the more limited retention – does not provide a compelling case for this scenario.

8.14.5 *Recommended Scenarios*

It is recommended that Scenario 1 and Scenario 3 are taken forward for further consideration. Between them, these scenarios offer the maximum retained expenditure within catchments, or the optimum balance of retained expenditure within catchments without unacceptable prejudice to Almondvale (Livingston) or Bathgate. A summary of the scenario outputs is below:

8.14.6 *Scenario 1 – Maximum Floorspace*

- **Almondvale (Livingston):** no retail capacity at the base year.
- **Bathgate:** no retail capacity within the study period. Consented floorspace at two sites within the study period.
- **Linlithgow:** no retail capacity within the study period. No consented sites within the study period.
- **Armadale**: Opportunity for £15.7m turnover or 1,109 to 2,243 sqm by 2016, rising to £22.1m or 1,413 to 2,857 sqm by 2026.
- **Broxburn:** opportunity for £12.7m turnover or 897 to 1,813 sqm by 2016, rising to £20.4m or 1,305 to 2,637 sqm by 2026.
- **East Calder:** Opportunity for £15.4m turnover or 1,087 to 2,198 sqm by 2016, rising to £23.9m or 1,523 to 3,079 sqm by 2026.
- **Whitburn:** Opportunity is largely taken up by an existing consent, with a small residual difference of £2.9m by 2016 (203-410 sqm) and £8.8m by 2026 (563-1,139 sqm).
- **Winchburgh:** £7.6m turnover, or 537 to 1,085 sqm by 2016, rising to £16.5m or 1,055 to 2,132 sqm by 2026.

8.14.7 Scenario 3- Precautionary

- **Almondvale (Livingston):** no retail capacity within the study period – although the negative balance decreases significantly.

- **Bathgate:** no retail capacity within the study period. Consented floorspace at two sites within the study period.

- **Linlithgow:** no retail capacity within the study period. No consented sites within the study period.

- **Armadale:** Opportunity for £12m turnover or 845 to 1,708 sqm by 2016, rising to £17.3m or 1,105 to 2,235 sqm by 2026.

- **Broxburn:** opportunity for £8.4m turnover or 591 to 1,194 sqm by 2016, rising to £14.9m or 951 to 1,922 sqm by 2026.

- **East Calder:** Opportunity for £13m turnover or 916 to 1,853 sqm by 2016, rising to £20.2m or 1,290 to 2,608 sqm by 2026.

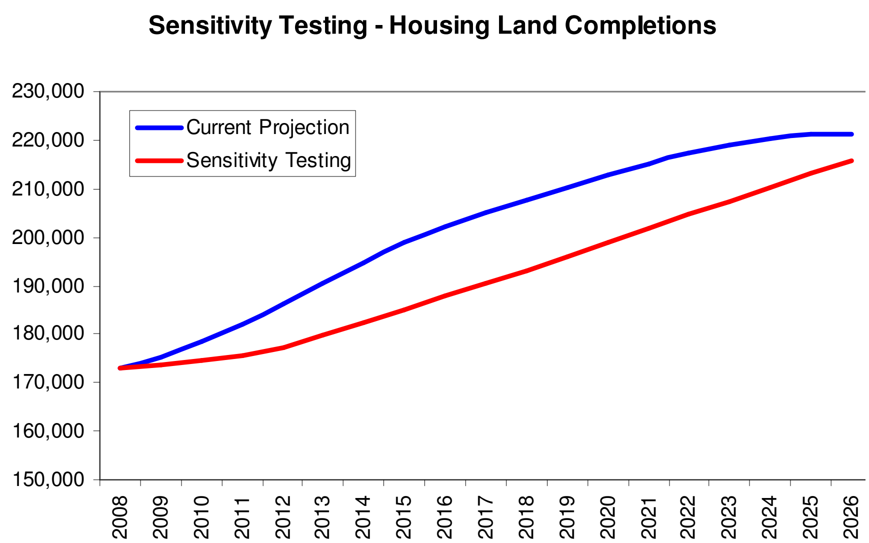
- **Whitburn:** Opportunity is largely taken up by an existing consent, with a small residual difference of £1.5m by 2026 (96-194 sqm).

- **Winchburgh:** £6.3m turnover, or 443 to 895 sqm by 2016, rising to £13.9m or 887 to 1,792 sqm by 2026.

8.15 ***Sensitivity Testing***

The problems of the "credit crunch" and how these relate to the housing market are well-known, and there is the prospect of a decline in housing completions in the short term. To this end, West Lothian Council have prepared a revised housing model which considers this possible outcome. This is illustrated in Figure 8.4 below which shows phased completions for West Lothian as a whole by year.

Figure 8.4: Housing Land Completions (source: WLC data 2008)



This model has been used to deliver variant scenarios as part of sensitivity testing, to indicate what may happen if housing allocations are not delivered as scheduled. It is clear from the figure above that completions will fall off sharply in early years and climb to reach a level shortly below that projected for 2026. Scenario sensitivity testing is displayed in Tables 8.22 and 8.23. The output of the sensitivity testing is that there is a long-term change of 2,116 units (or approximately 5,000 persons or £11million over the entire study area) which leads to a decline in floorspace opportunities and increased impacts on Almondvale in particular (-£27m for Scenario 1 and -£13m for Scenario 3 in 2026, as opposed to -£23m and -£7m respectively for the standard scenarios). Bathgate would be *less* affected (-£13m for Scenario 1 and -£7m for Scenario 3 in 2026, as opposed to -£15m and -£9m respectively for the standard scenarios). The main outcome will be significantly lessened opportunity in the short to medium term, which will pick up in the longer term, although not entirely to the original forecast level.

Table 8.21: Forecast Retail Balance and Floorspace Opportunity – Sensitivity Testing

Population Change	Base Year 2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Av HH size		2.32	2.31	2.30	2.29	2.27	2.26	2.25	2.24	2.23	2.22
Almondvale (Livingston)	64,646	64,927	65,121	65,310	65,770	66,346	66,919	67,403	67,818	68,146	68,445
Armadale	13,085	13,099	13,238	13,424	13,634	14,016	14,532	15,023	15,496	16,033	16,544
Bathgate	24,705	25,040	25,352	25,823	26,295	26,828	27,419	28,016	28,529	28,957	29,330
Broxburn	15,033	15,082	15,139	15,158	15,240	15,467	15,728	16,099	16,547	17,038	17,670
East Calder	8,792	8,806	8,811	8,861	8,930	9,168	9,372	9,518	9,664	9,831	10,042
Linlithgow	19,000	19,044	19,065	19,072	19,079	19,088	19,090	19,135	19,193	19,193	19,193
Whitburn	24,037	24,088	24,240	24,438	24,742	25,062	25,502	25,803	26,151	26,519	26,798
Winchburgh	3,636	3,636	3,636	3,636	3,636	3,704	3,860	4,086	4,354	4,669	5,017
TOTALS	**172,934**	**173,721**	**174,602**	**175,722**	**177,326**	**179,680**	**182,422**	**185,084**	**187,752**	**190,385**	**193,040**

Population Change	2019	2020	2021	2022	2023	2024	2025	2026
Av HH size	2.21	2.20	2.19	2.18	2.17	2.16	2.15	2.14
Almondvale (Livingston)	68,755	69,027	69,246	69,454	69,671	69,995	70,425	70,853
Armadale	17,030	17,536	18,040	18,497	18,845	19,223	19,577	19,727
Bathgate	29,717	30,146	30,498	30,847	31,151	31,367	31,582	31,796
Broxburn	18,311	18,905	19,464	19,987	20,616	21,286	21,931	22,423
East Calder	10,263	10,593	11,031	11,554	11,988	12,420	12,850	13,385
Linlithgow	19,291	19,291	19,291	19,291	19,291	19,291	19,291	19,291
Whitburn	27,114	27,365	27,606	27,900	28,074	28,247	28,569	28,997
Winchburgh	5,470	6,009	6,557	7,154	7,653	8,258	8,794	9,350
TOTALS	**195,951**	**198,873**	**201,733**	**204,684**	**207,288**	**210,086**	**213,018**	**215,822**

Table 8.22: Forecast Retail Balance and Floorspace Opportunity – Scenario 1: 80%/70% Retention – Sensitivity Testing

Scenario 1	2011	2016	2021	2026	2011 sqm		2016 sqm		2021 sqm		2026 sqm	
Almondvale (Livingston)	-£51.0m	-£43.8m	-£36.6m	-£27.8m	0	0	0	0	0	0	0	0
Armadale	£9.1m	£12.9m	£17.9m	£22.0m	677	1,369	912	1,844	1,203	2,432	1,406	2,842
Bathgate	-£28.2m	-£22.3m	-£17.1m	-£12.8m	0	0	0	0	0	0	0	0
Broxburn	£4.4m	£7.1m	£12.9m	£19.7m	322	652	499	1,008	866	1,751	1,255	2,536
East Calder	£11.1m	£13.0m	£16.0m	£21.0m	822	1,662	917	1,853	1,073	2,169	1,340	2,708
Linlithgow	-£8.4m	-£8.3m	-£8.0m	-£7.9m	0	0	0	0	0	0	0	0
Whitburn	-£2.8m	£0.1m	£3.1m	£6.3m	0	0	7	18	206	417	402	812
Winchburgh	£3.5m	£4.8m	£8.6m	£13.8m	258	521	337	682	576	1,165	883	1,786
Total	**-£62.3m**	**-£36.5m**	**-£3.2m**	**£34.3m**	**2,079**	**4,203**	**2,674**	**5,405**	**3,924**	**7,934**	**5,285**	**10,684**

Table 8.23: Forecast Retail Balance and Floorspace Opportunity – Scenario 3: 80%/60% Retention – Sensitivity Testing

Scenario 3	2011	2016	2021	2026	2011 sqm		2016 sqm		2021 sqm		2026 sqm	
Almondvale (Livingston)	-£42.7m	-£34.1m	-£24.6m	-£13.2m	0	0	0	0	0	0	0	0
Armadale	£6.4m	£9.6m	£13.8m	£17.2m	474	959	676	1,366	925	1,870	1,099	2,222
Bathgate	-£24.3m	-£17.9m	-£11.9m	-£6.9m	0	0	0	0	0	0	0	0
Broxburn	£1.2m	£3.5m	£8.4m	£14.2m	93	187	245	496	565	1,143	904	1,828
East Calder	£9.3m	£10.9m	£13.5m	£17.7m	689	1,393	770	1,557	904	1,828	1,133	2,290
Linlithgow	-£8.4m	-£8.3m	-£8.0m	-£7.9m	0	0	0	0	0	0	0	0
Whitburn	-£7.7m	-£5.5m	-£3.2m	-£0.7m	0	0	0	0	0	0	0	0
Winchburgh	£2.7m	£3.9m	£7.1m	£11.6m	204	412	272	549	476	963	740	1,495
Total	-£63.4m	-£37.8m	-£4.9m	£32.1m	**1,460**	**2,951**	**1,963**	**3,968**	**2,871**	**5,804**	**3,876**	**7,835**

8.16 ***General Observations***

Whichever scenario is deemed most appropriate, there are a number of general observations:

- There is no retail capacity in Almondvale (Livingston). However, there may be a case for further floorspace in certain circumstances, either for Almondvale or for a wider catchment area (including East Calder). Nevertheless, there should be a presumption against further floorspace unless it is for a clear need (new local neighbourhood centres) and it is demonstrated (through a retail assessment) that there is no unacceptable impact on other centres or the strategy of retaining expenditure in other catchments.
- There will be no retail capacity in Bathgate due to existing consents.
- There is unlikely to be additional retail capacity in Whitburn beyond a small foodstore or an extension of floorspace due to an existing consent.
- There will be no retail capacity in Linlithgow due to its satisfactory current retention levels, the modest increase sought and lack of significant future housing allocations.
- There is retail capacity in Armadale, Broxburn, East Calder, Winchburgh and Whitburn (limited).
- Impacts on Almondvale (Livingston) and Bathgate may be mitigated to a limited extent if internet spending is drawn from stores within these catchments – however, this is an unknown dynamic and applies to a small amount of expenditure, approximately £1m.
- Almondvale (Livingston) may be sustained by an unknown quantum of expenditure from beyond the study area, in terms of linked trips to comparison shopping and possibly work-related trips. This could be established through in-centre surveys, possibly as part of to a future comparison goods study.
- Almondvale (Livingston) could be sustained by spend from East Calder if this was viewed as appropriate. In this case, the East Calder floorspace opportunity would be combined with the Almondvale catchment as a wider catchment. Alternatively, retail floorspace in East Calder could be developed in the longer term beyond 2016, following substantial housing completions, with trade continuing to flow to Almondvale.
- Bathgate could be sustained by spend from Armadale and/or Whitburn in the same way as Almondvale/East Calder in the short-to-medium term by delaying floorspace until substantial housing completions have occurred, beyond 2016, with expenditure continuing to flow to Bathgate. However, there is a clear need for floorspace in Armadale and committed floorspace in Whitburn.

- Armadale and Whitburn could be combined into a larger Armadale/Whitburn catchment to provide a "critical mass" for a larger floorspace opportunity in either Armadale or Whitburn serving both catchments.
- The qualitative retail and accessibility aspects of this study should be considered before arriving at a final conclusion and recommendations.

8.17 ***Conclusion***

Retail capacity has been considered in terms of two scenarios: a high retention scenario, which seeks to retain maximum expenditure in catchments, and a medium retention scenario which recognises the risks to the sub-regional centre of Almondvale (Livingston) and the district centre of Bathgate if spend imported by these catchments is reduced. Sensitivity testing has also been carried out, with both scenarios re-developed to demonstrate the outcome in the event of a decline in housing completions. A summary of the range of opportunities offered by Scenarios 1 and 3, with sensitivity testing considerations, is below:

Table 8.24: Forecast Retail Balance and Net Floorspace Opportunity (turnover figures are rounded)

Catchment	**Projected Capacity**			
	Opportunity to 2016		**Further Opportunity 2016 to 2026**	
	Scenario 3 80%/60%	**Scenario 1** 80%/70%	**Scenario 3** 80%/60%	**Scenario 1** 80%/70%
Armadale	£12m 845 – 1,708 sqm	£15.7m 1,109 - 2,243 sqm	£5.3m 261 to 527 sqm	£6.4m 304 – 615 sqm
Broxburn	£8.4m 591 – 1,194 sqm	£12.7m 897 – 1,813 sqm	£6.5m 360 – 728 sqm	£7.7m 408 – 824 sqm
East Calder	£13m 916 – 1,853 sqm	£15.4m 1,087 – 2,198 sqm	£7.2m 373 – 755 sqm	£8.5m 436 – 881 sqm
Whitburn	- -	£2.9m 203– 410 sqm	£1.5m 96 – 194 sqm	£5.9m 361– 729 sqm
Winchburgh	£6.3m 443 – 895 sqm	£7.6m 537 – 1,085 sqm	£7.6m 444 – 897 sqm	£8.9m 518 – 1,047 sqm
Catchment	**Sensitivity Testing**			
	Opportunity to 2016		**Opportunity to 2026**	
	Scenario 3 80%/60%	**Scenario 1** 80%/70%	**Scenario 3** 80%/60%	**Scenario 1** 80%/70%
Armadale	£9.6m 676 – 1,366 sqm	£12.9m 912 – 1,844 sqm	£7.6m 423 - 855 sqm	£9.1m 494 – 998 sqm
Broxburn	£3.5m 245 – 496 sqm	£7.1m 499 – 1,008 sqm	£10.7m 659 – 1,332 sqm	£12.6m 756 – 1,528 sqm
East Calder	£10.9m 770 – 1,557 sqm	£13m 917 – 1,853 sqm	£6.8m 363 – 733 sqm	£8m 423 – 855 sqm
Whitburn	- -	£0.1m 7 – 18 sqm	£0.9m 56 – 113 sqm	£6.2m 392– 793 sqm
Winchburgh	£3.9m 272 – 549 sqm	£4.8m 337 – 682 sqm	£7.7m 468 – 946 sqm	£9m 546 – 1,104 sqm

It is clear that all catchments in table 8.24 have some degree of retail capacity, and this is lessened or pushed backwards in the sensitivity testing scenario of lower housing completions. There may also be a case for development in Almondvale (Livingston) if there is an identified need and if there is no unacceptable impact on other centres or the strategy of retaining spend in other catchments.

Notably, Armadale and Broxburn have greater later capacity during the period to 2026 in the sensitivity testing scenarios, than in the standard forecast scenarios.

9 Accessibility of Sites and Catchments

9.1 Introduction

This chapter provides the key transport inputs into the Retail Capacity Study for West Lothian Council and includes the following:

- Policy review, focussing on accessibility;
- Accessibility of each site – the existing access arrangements and the existing transport infrastructure has been reviewed at, and close to, the sites identified and has considered accessibility by all modes;
- The wider suitability of each sites, with regard to national and development plan policy;
- Vehicular trips and road network impact, in order to determine the potential impact on the local road network, has been determined;
- The potential and likely preferences for access to sites and constraints to development have been determined.

9.2 Policy Review

9.2.1 SPP 8

SPP 8 sets out the Scottish Executive's policy for town centres and their key uses, particularly retailing, which contribute to their economic growth and enhancement, is underpinned by a series of high-level objectives including:

- *Support development in existing accessible locations or in locations where accessibility can be improved. This means encouraging developments that are accessible to all, reduce the need to travel and provide alternatives to car use by being served by a choice of modes of transport.*

SPP 8 also states that '*…all retail, leisure and related developments are required to provide a high degree of accessibility, by a range of modes including public transport. Developments should be located close to existing access networks that have the potential to accommodate higher density development, or where accessibility can be improved by developer or public funding. Where transport improvements are necessary these should be in place before developments begin operation*'.

SPP 8 also informs that '*Accessibility for people and the delivery of goods is essential to the success of a town centre. The perception of convenience is also a key element, for example whether a location is in close proximity to a person's home or place of work and the easy availability of short-term parking. A mix of uses enhances the likelihood of multi-purpose journeys*'.

Another line of reasoning expressed in SPP 8 is that access is *'…a key element of the wider social justice and health improvement agendas. Town and commercial centres should be accessible at all times to all sectors of the community and include the appropriate provision of facilities for disabled people. Particular attention should be made to making the approach to buildings and the buildings themselves easy to use for as wide a range of people as possible*'.

All of the sites detailed in this chapter are sequentially out-of-centre. It may be the case that some sites are more centrally located than others, which may be a consideration in applying the sequential test in any supporting retail assessment.

9.2.2 SPP17

SPP 17, 'Planning for Transport', '*supports the overall vision of a Scotland where the economy can flourish and communities can function without significant environmental and social problems arising from car dependency, traffic congestion and pollution'.*

In the case of walking SPP17 conveys that new development should be accessible on foot, both in internal layout and in external connections. Proposals should meet the objectives of measures to be adopted by the Executive to encourage walking. Urban areas should be made more attractive and safer for pedestrians, including in particular people with mobility difficulties. Improved conditions, including a well planned Core Path Network, linked to planning policies which promote local activity, could lead to a significant change in travel choices.

In areas where policy is to encourage access on foot, town centres being one example, the pedestrian should be given priority over other modes. This should be reinforced through measures to reduce traffic speed, restrict the movement of vehicles and give pedestrians priority over vehicles.

Cyclists' interests and routes should also be accommodated in proposals for development with creation or enhancement adding incrementally to a comprehensive cycle network in accord with the objectives and guidance in the National Cycling Strategy. Cycle networks should be continuous, with severance by main or distributor roads avoided; where necessary to achieve a safe, coherent and direct route, signalled crossings should be provided.

New development areas should be served or be proposed to be served by public transport accessing a range of potential destinations (a contribution from the developer may be appropriate). Sites with significant public transport accessibility, either at nodes in the network or along high frequency corridors, should be developed at higher densities and with restrictive maximum parking standards. All such sites should seek to enable pedestrian movement from the public transport facility to the development without conflict with cars manoeuvring in any car park.

Parking policies have an important role to play in reducing reliance on the car. In town centres, short term parking, preferably off-street, can support accessibility and vitality. Parking restraint policies should be supported by measures to promote availability of high quality public transport services and effective management of traffic demand.

Statutory equal opportunities obligations should be taken into account in planning developments in relation to their accessibility to different users by different means of transport. Particular attention should be paid to socially excluded groups, and to accessibility to areas of social deprivation. Social exclusion may arise through unemployment, poverty or other economic factors, homelessness, geographical remoteness, ill health, religious or cultural mores, or through age (children and the elderly).

9.2.3 *The Disability Discrimination Act 1995*

The Disability Discrimination Act 1995 aims to provide disabled people (physical or mental impairment which has a substantial and long-term adverse effect on the ability to carry out normal day-to-day activities) with an equal opportunity in terms of access to goods and services. The general principle embodied in legislation is that disabled people should not be discriminated against, either by being treated less favourably than other people for a reason related to their disability, or through a failure to make a reasonable adjustment. This may have implications for, among other things, access and parking for disabled persons' vehicles in situations where otherwise vehicular access is being discouraged. It will also have design requirements, for example, for use by disabled people of pedestrian or pedestrian/cycle routes. For disabled people who are not restricted to their own personal transport, accommodating dial-a-bus type services, or designing access to public transport, waiting facilities, information and ticketing, will all assist in giving as high a degree of freedom of access as is practicable.

9.3 Floorspace Opportunity and Potential Sites[11]

9.3.1 From the retail capacity section of the study the following opportunities up to 2016 are to be considered:

- Armadale – 845 sqm to 2,243 sqm or up to 2.3 ha gross.
- Broxburn – 591 sqm to 1,813 sqm or up to 1.9 ha gross.
- East Calder – 916 sqm to 2,198 sqm, or up to 2.2 ha gross.
- Whitburn – 203 sqm to 410 sqm or up to 0.5 ha gross.
- Winchburgh – 443 sqm to 1,085 sqm, or up to 1.1 ha gross.
- Bathgate, Linlithgow – no retail capacity.
- Almondvale (Livingston) – no retail capacity, except to meet an identified need and where there is no unacceptable impact on centres or on the strategy of retaining spend in other catchments.

9.3.2 Beyond 2016, in the period to 2026, the following further opportunities exist:

- Armadale – 261 sqm to 615 sqm.
- Broxburn – 360 sqm to 824 sqm.
- East Calder – 373 sqm to 881 sqm.
- Whitburn – 96 sqm to 729 sqm.
- Winchburgh – 444 sqm to 1,047 sqm.

9.3.3 The maximum floor areas will be assumed in this assessment to ensure a robust assessment, looking at the opportunities within the period to 2016.

A number of sites have been identified that coincide with the priority areas for meeting floorspace opportunities, listed below and shown at Figure 9.1

- Armadale, Watson Park – approx 3.8 ha.
- Armadale, Bathgate Road- approx 3.5 ha.
- Armadale, Lower Bathville – 40 ha, 2 possible locations.
- Broxburn, Candleworks – 7.7ha

[11] For gross land areas, it is assumed that the net area will be approximately 10% of the gross area.

- Broxburn, Thistle – 6.6 ha
- Whitburn, Heartlands – 4.5 ha

These sites are shown below in Figure 9.1 for West Lothian, and in more detail in following paragraphs.

Figure 9.1: Sites 1 to 7

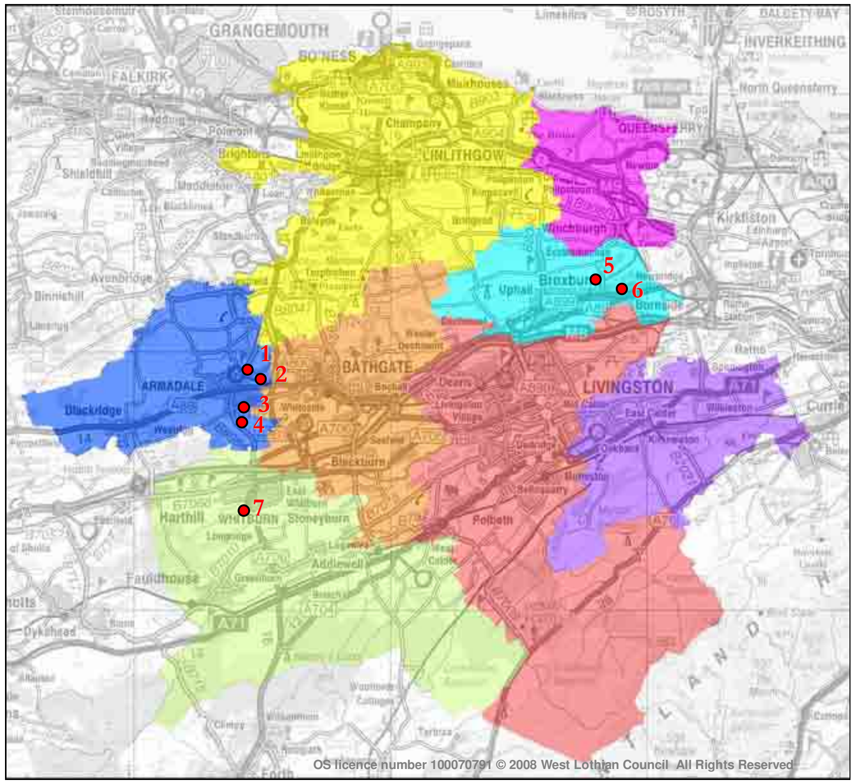
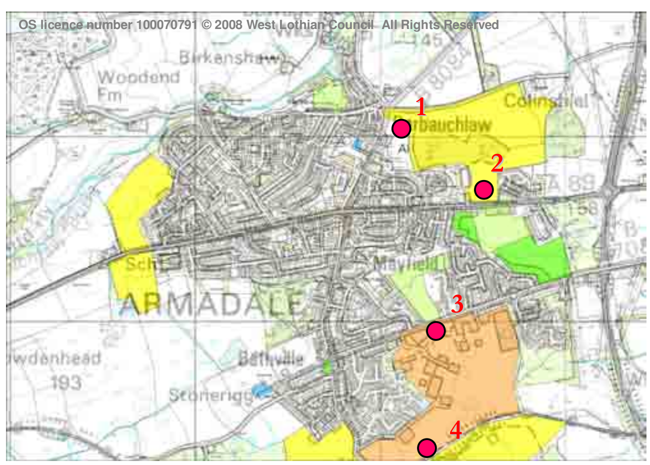


Figure 9.2: Sites 1 to 4



- 1. Watson Park – approx 3.8 ha.
- 2. Bathgate Road- approx 3.5 ha.
- 3. and 4. Lower Bathville – 40 ha, 2 possible locations.

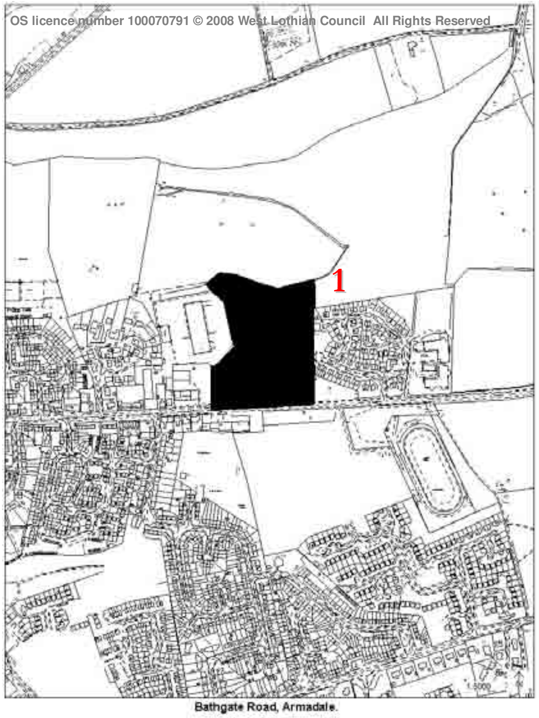


Figure 9.3: Site 1

Figure 9.4: Site 2

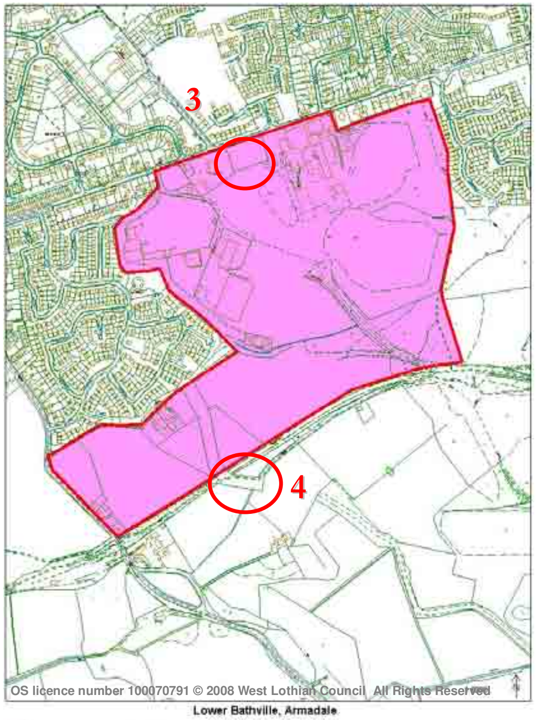
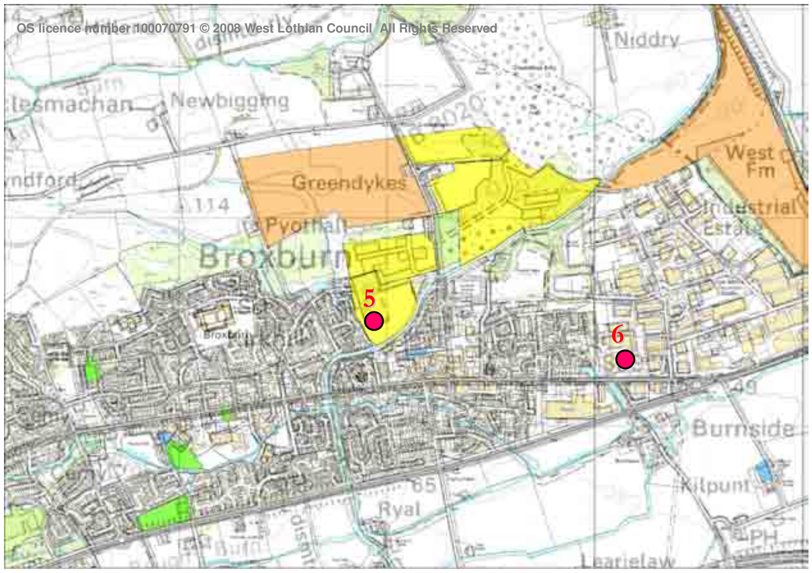


Figure 9.5: Sites 3 and 4

Figure 9.6: Sites 5 and 6

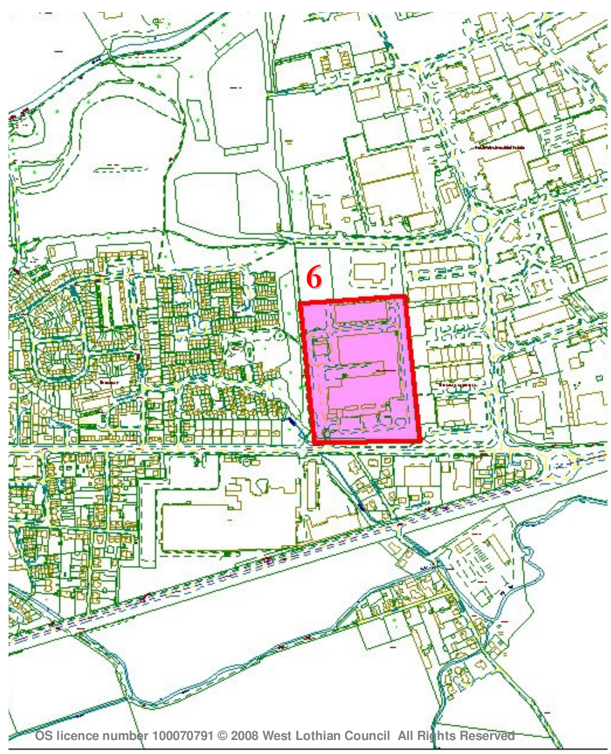


- 5. Candleworks – 7.7ha
- 6. Thistle – 6.6 ha

Figure 9.7: Site 5

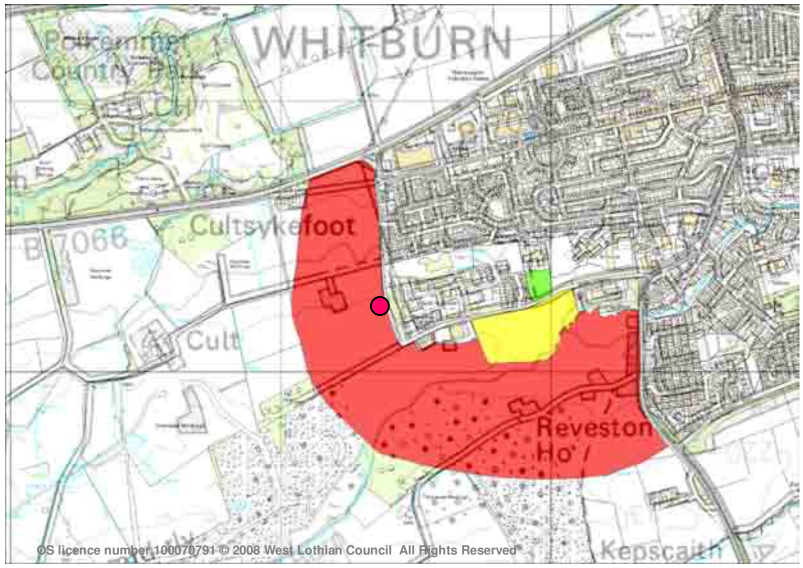
Candleworks, Broxburn

Figure 9.8: Site 6



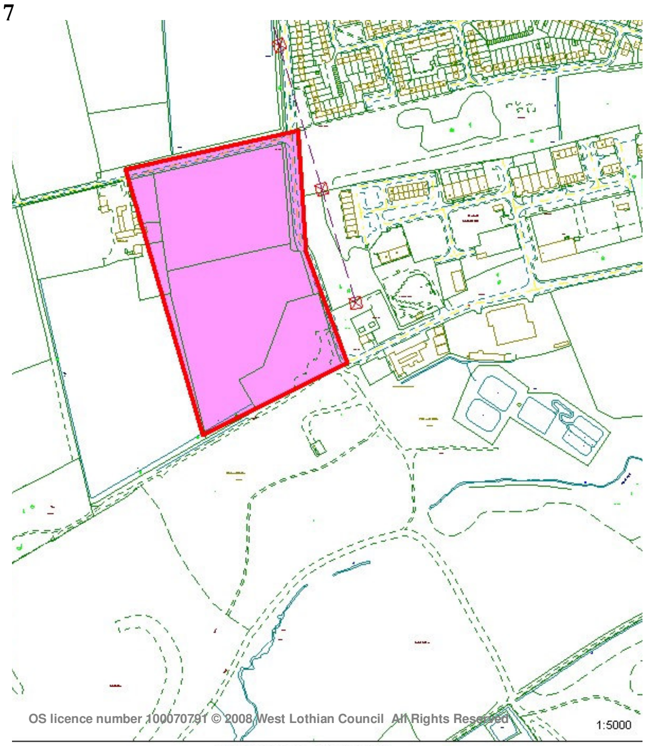
Industrial Estate Broxburn

Figure 9.9: Site 7



- 7. Heartlands – 4.5 ha

Figure 9.10: Site 7



9.4 ***Pedestrian/Cycle Access and Movement***

9.4.1 *Introduction*

Pedestrian movements should be made as convenient, safe and pleasant as possible by careful attention to the design and layout of pedestrian routes. The provision for cyclists should be examined at the same time as the provision for pedestrians as the two can often be combined. Pedestrian routes should be lit and signed where appropriate.

9.4.2 *Armadale*

The first prospective site in Armadale, to the eastern end of the town, has footways on both sides of East Main Street (A89), offering access for pedestrians to and from the surrounding residential areas (some still being constructed at the time of the site visit). There is a signalised pedestrian crossing on East Main Street to the east of the potential site principally provided to aid the crossing of East Main Street for residents in the neighbouring Birkdale Park residential housing estate.

Figure 9.11: Site 1 photographs

East Main Street (looking east)

East Main Street (looking west)

New residential development opposite

The second possible site in Armadale, adjacent to North Street (B8084), has footways on both sides of the street and offers access for pedestrians to and from the surrounding residential areas and the town centre, with neighbouring facilities such as the swimming pool and health centre. The site is an existing public park. No pedestrian crossings are located on North Street close to the potential site and would have to be provided if the site is to be developed for the purpose proposed in this study.

Figure 9.12: Site 2 photographs

North Road (looking south)

North Road (looking north)

The third potential site, adjacent to Lower Bathville (B708), has footways on both sides of the street and offers access for pedestrians to and from the surrounding residential areas. No pedestrian crossings are located on Lower Bathville close to the potential site and would have to be provided if the site is to be developed for the purpose proposed in this study. The potential site is currently disused industrial land.

Figure 9.13: Site 3 photographs

Lower Bathville (looking west)

Lower Bathville (looking east)

The final potential site is proposed at a yet to be developed site with only the existing traffic-free national cycle network route 75 nearby (which stretches from Glasgow to Edinburgh). There is also a 1.4km traffic-free cycle route linked to this that terminates at East Main Street near the first potential site and just to the east of the Speedway Stadium. It is anticipated that the necessary pedestrian links will be provided if this site is to be developed linking with the neighbouring residential areas, particularly those immediately to the north.

Any detailed site design should incorporate good pedestrian access on and from the local footpath network and provide direct access to the building, with a clearly defined and well-lit footpath. The proposed footway linking to the existing pedestrian routes will have to be constructed to West Lothian Council standards.

9.4.3 *Broxburn*

The first potential site in Broxburn, adjacent to East Main Street (A899) and currently part of East Mains Industrial Estate, has footways on either side of East Main Street – the one to the north (development site side) being shared by pedestrians and cyclists. These offer access for pedestrians and cyclists to the neighbouring residential areas and surrounding businesses. The nearest signalised pedestrian crossing is incorporated into the traffic signals at the East Main Street/Dunnet Way junction, although there are dropped kerbs with buff tactile paving and central traffic islands (double-d) nearby. It is likely that any future development for the use being considered in this study would require a signalised pedestrian crossing near to the site.

Figure 9.14: Site 5 photographs

East Main Street (looking west)

East Main Street (looking east)

The second potential site is located at an area identified as Greendykes, adjacent to Greendykes Road (B8020) and the neighbouring residential area to the west. Greendykes Road has footways on either side to the point where a potential access to the site might be located with the eastern footway terminating close to this point allowing access for pedestrians from the neighbouring residential areas to the south. There are central traffic islands (double-d) in the vicinity that will enable pedestrians to cross although any future development of the site is likely to merit a signalised pedestrian crossing.

Figure 9.15: Site 6 photographs

Greendykes Road (looking south)

Greendykes Road (looking north)

Cunningham Crescent (looking to potential site)

Galloway Crescent (looking north)

Galloway Crescent (looking south)

Any detailed site design should incorporate good pedestrian access on and from the local footpath network and provide direct access to the building, with a clearly defined and well-lit footpath. The proposed footway linking to the existing pedestrian routes will have to be constructed to West Lothian Council standards.

9.4.4 *Whitburn*

The potential site in Whitburn located adjacent to Polkemmet Road, has a footway on its eastern side but terminates just to the north of the proposed site. This western end of the town, in the vicinity of Polkemmet Road is poorly served by footways although the 'Whitburn Town Path' does terminate close to the potential site. This 3.8km path goes through the heart of the town's residential area and heads in an easterly direction continuing to East Whitburn and beyond. The urban section of the path is generally 1.5m in width, lit and constructed of tarmac. The section between Polkemmet Road and Blaeberry Hill Road (eastern end of the town) is heavily used for walking and cycling to work, shops, school etc. There is the opportunity to connect this route into the 'Heartlands' redevelopment of the former Polkemmet mine which aims to transform this part of Whitburn into a new residential area. This core path will become a key link with the 'Heartlands' path network.

Figure 9.16: Site 7 photographs

Polkemmet Road (looking north)

Polkemmet Road (looking south)

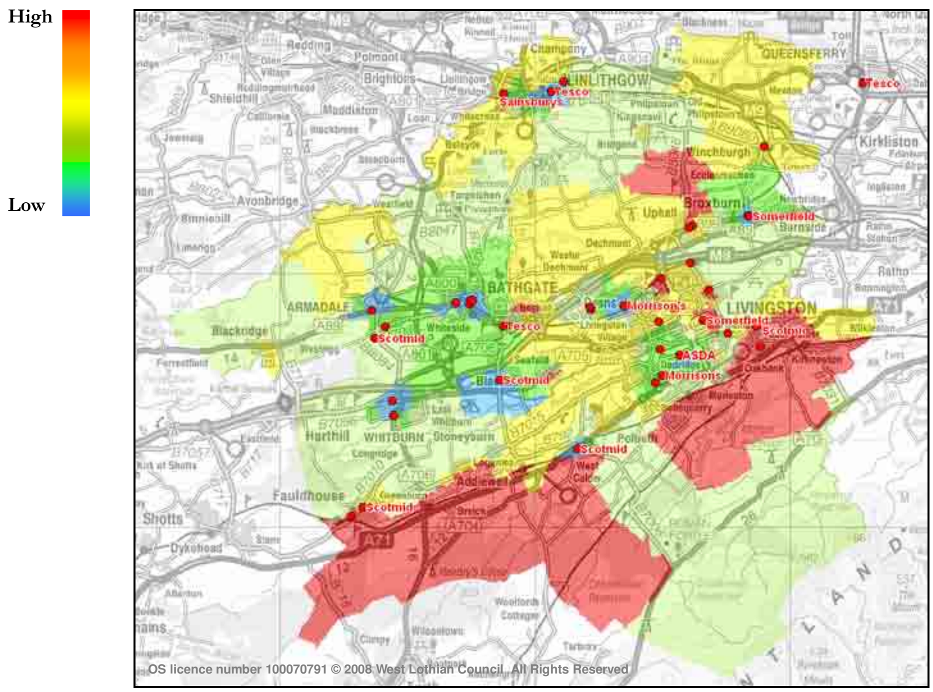
Any detailed site design should incorporate good pedestrian access on and from the local footpath network and provide direct access to the building, with a clearly defined and well-lit footpath. The proposed footway linking to the existing pedestrian routes will have to be constructed to West Lothian Council standards.

9.5 *Public transport*

9.5.1 *Introduction*

The results from the survey of retail shopping patterns established that, with the exception of the third of respondents who did not know, there was a uniformly high level of satisfaction with public transport with, on average, less than 10% taking the view that access to the town centre was poor or very poor. Dissatisfaction was greater amongst male and young respondents indicating a trend towards an increasing preference for private car use. In terms of public transport accessibility, Figure 9.17 below illustrates relative accessibility deprivation.

Figure 9.17: Accessibility Deprivation – Public Transport (SIMD 2006)



It is accepted that most main shopping trips will be by private car, but public transport accessibility is important for top-up trips and for those without access to a car. The bus is likely to be the main form of public transport for routine food shopping trips. Table 9.1 below details the number of services operated from the catchment centres.

Table 9.1 Bus Service Coverage by Catchment

Catchment Centre	Number of Services	Catchment Centre	Number of Services
Almondvale (Livingston)	48	Broxburn	16
Bathgate	36	East Calder	7
Linlithgow	18	Whitburn	20
Armadale	17	Winchburgh	6

9.5.2 *Armadale*

In the vicinity of the first potential site in Armadale there are bus stops located on both sides of the carriageway. These bus stops are easily accessible from the proposed site via the existing footways. Services at these bus stops include regular connections with the town centre and other surrounding areas including Whitburn, Fauldhouse, Blackridge and Harthill.

Figure 9.18: Public Transport – Armadale Site 1

East Main Street (westbound bus stop)

The existing bus stops on North Street, where the second potential site is located, are slightly more remote.

Figure 9.19: Public Transport – Armadale Site 2

North Road (northbound bus stop) **North Road (southbound bus stop)**

Bus stops also exist close to the third potential site and these are easily accessible via the existing footways adjacent to the site.

Figure 9.20: Public Transport – Armadale Site 3

Lower Bathville (eastbound bus stop)

Lower Bathville (westbound bus stop)

Access to the fourth potential site is currently not well served by bus services and as such no existing bus stops serve the site, although future development in the area may encourage the provision of additional bus infrastructure and the re-routing of or additional services in this area. All existing services are focussed on Armadale town centre.

Any new or re-located bus stop facilities should be in place prior to the site being occupied to encourage, and help establish, the use of public transport as much as possible. Contact will have to be made between the developer, the Planning & Transportation Department and the bus operators to integrate these with existing services. The proposed bus stops will have to conform to West Lothian Council specifications.

9.5.3 *Broxburn*

The first potential site in Broxburn, located on East Main Street, has bus stops on both sides of the Street adjacent to the site and these are easily accessible via the existing footways. Bus services serving these bus stops are regular and provide links to the town centre as well as to/from Edinburgh and to/from surrounding towns such as Bathgate, Whitburn and Fauldhouse.

Figure 9.21: Public Transport – Broxburn Site 5

East Main Street (eastbound bus stop)

East Main Street (westbound bus stop)

Bus stops are also located near to the second site on Greendykes Road and are also accessible via the existing footways, although these are more remote. No bus stops are located near to the western end of the potential site with the nearest bus stops located on West Main Street.

Figure 9.22: Public Transport – Broxburn Site 6

Greendykes Road (northbound bus stop)

Greendykes Road (southbound bus stop)

All bus services that could be used to service the potential sites are focussed on the town centre. Any new or re-located bus stop facilities should be in place prior to the site being occupied to encourage, and help establish, the use of public transport as much as possible. Contact will have to be made between the developer, the Planning & Transportation Department and the bus operators to integrate these with existing services. The proposed bus stops will have to conform to West Lothian Council specifications.

9.5.4 *Whitburn*

The nearest bus stops to the potential site in Whitburn are located on Polkemmet Road, one just to the north of the site on the opposite side of the road and another near to the junction with West Main Street, although these do not have the frequency of services available to the stops located on West Main Street, near to the junction with Polkemmet Road. However, the significant development of this area of Whitburn is likely to see the area better served by public transport and it will be beneficial to allow this site to be served by these public transport service improvements. Existing bus services are focussed on the town centre.

Figure 9.23: **Public Transport – Whitburn Site 7**

Polkemmet Road (southbound bus stop)

Any new or re-located bus stop facilities should be in place prior to the site being occupied to encourage, and help establish, the use of public transport as much as possible. Contact will have to be made between the developer, the Planning & Transportation Department and the bus operators to integrate these with existing services. The proposed bus stops will have to conform to West Lothian Council specifications.

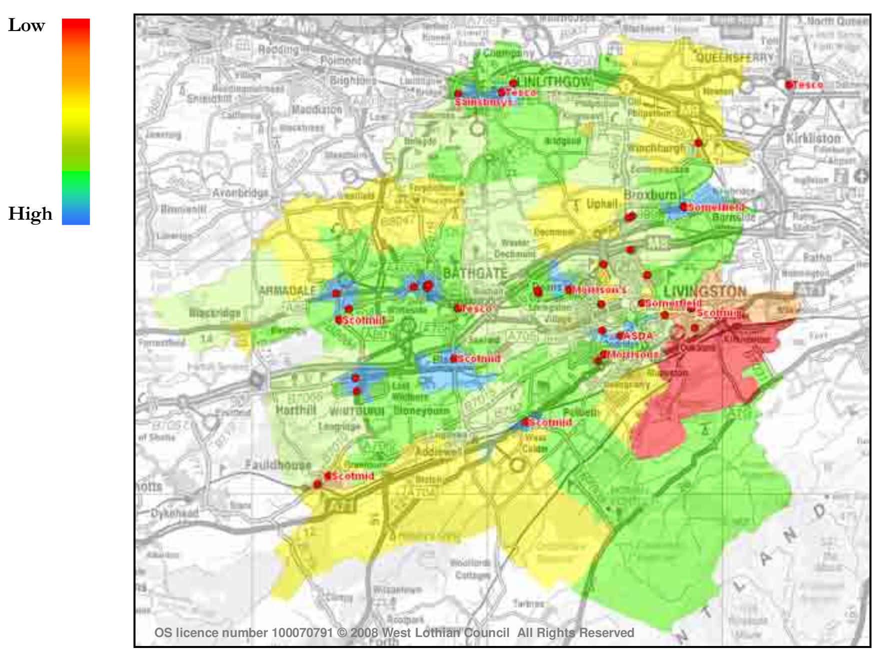
9.6 *Traffic Impact*

9.6.1 *Introduction*

From the results from the survey of retail shopping patterns it was established that the private car is overwhelmingly the preferred mode of transport used for main food shopping trips by all age groups. The 55+ age group were most likely to shop as a car passenger (28.9%) or to use public transport with 16.3% using the bus. This compares to only 3.5% of the 18-34 age respondents choosing public transport, preferring to take a taxi if a car is not available. Since less than 10% claimed that public transport access to their town centre was poor or very poor this must be seen as a deliberate choice rather than a necessity and probably due to the physical difficulty of managing to transport heavy and bulky food shopping by bus.

The accessibility of foodstores by private car is illustrated below in Figure 9.24. Most of West Lothian is reasonably accessible by private car, although it should be borne in mind that the Household Survey found that 20% of households had no access to a car, slightly higher in western West Lothian and lower in East Calder, Almondvale (Livingston) and particularly Linlithgow.

Figure 9.24: **Accessibility Deprivation – Private Car (SIMD 2006)**



9.6.2 *Trip Rates*

9.6.3 In order to establish an estimate of the number of vehicular trips likely to be attracted to the sites, trip rates were extracted from the TRICS database and were based upon the assumed land uses. These are summarised in the table below. TRICS is a database system comprising a large number of records of individual developments across a wide range of land use categories. Within these records are one or more pages of survey counts, traffic or multi-modal. These counts are backed up by detailed information on the sites themselves and the local environment.

Table 9.2: Trip Rates and Trip Numbers (for 2016)

	Size	Trip Rates				Trip Numbers			
		Friday PM Peak		Saturday Peak		Friday PM Peak		Saturday Peak	
	m^2	Arr.	Dep.	Arr.	Dep.	Arr.	Dep.	Arr.	Dep.
Armadale	2,243	9.25	9.71	8.33	8.40	207	218	187	188
Broxburn	1,813	9.25	9.71	8.33	8.40	168	176	151	152
Whitburn	410	9.25	9.71	8.33	8.40	37	40	34	34

9.6.4 *Traffic Impact*

9.6.5 This assessment of vehicular trips is seen as robust as it assumes that all trips to and from the potential sites are new trips. This is unlikely to be the case as it is anticipated that a significant proportion of these will be pass-by trips and trips associated with existing food retail developments. A more detailed capacity analysis may be required particularly in the cases of the developments proposed for Armadale and Whitburn. The Scottish Executive's 'Transport Assessment and Implementation: A Guide' document suggests that a Transport Assessment may be required for a food retail development that is greater than 1,000m^2 GFA or when a development is a focus for 100 or more vehicle movements per day

9.7 *Policy Fit*

The policy fit of the sites is considered below, with regard to SPP8 and the Development Plan, scrutinised in Chapter 2. It must be stressed that this is an examination of all sites with regard to policy fit and not a comparative analysis of the relative best fit. The sites would require development proposals, and there is far from sufficient identified retail capacity to allow retail development at all the identified sites.

9.7.1 *SPP 8*

SPP 8 (para 38) states that "*all planning applications should be rigorously assessed against the development plan and the policy set out in this SPP. The assessment should be applied to all new development, redevelopment or extensions to existing facilities, changes of use, renewal of planning permission and applications to vary or remove existing planning conditions concerned with the scale and or character of the development*." In particular, the proposal should be of high design quality and at an appropriate scale for its location and the location is, should be conveniently and safely accessible to all sectors of the community.

For proposed developments not consistent with the Development Plan, additional requirements are stipulated:

- *A sequential approach to site selection has been used*
- *There is no unacceptable individual or cumulative impact on the vitality and viability of the network of centres identified in the development plan;*
- *The proposal will help to meet qualitative and quantitative deficiencies identified in the development plan; and*
- *The proposal does not conflict with other significant objectives of the development plan or community planning strategies.*

Development of a food supermarket or superstore on these sites would be considered of an appropriate scale for their locations, as the sites are all relatively close to the centres of identified catchments. In terms of accessibility, all of the sites are capable of being made conveniently and safely accessible to all sectors of the community, and the analysis of this chapter should be considered as guidance in developing proposals. Sequentially, all of the sites identified are out-of-centre.

In general, the sites are consistent with the Development Plan, which supports the principle of development outwith the settlement boundary for Broxburn, Whitburn and Armadale, commensurate with expanding populations generated by major developments (policy TC9). However, the Development Plan requires such sites to fully satisfy the sequential testing and other requirements of the Development Plan and national policy. In terms of SPP 8, the sites are all out-of-centre and, with the exception of the Candleworks site at Broxburn, none are the subject of specific proposals.

Any proposals that exceed 2,500 sqm gross will require a Retail Assessment. It would need to be demonstrated that there was no unacceptable individual or cumulative impact on the vitality and viability of the network of centres identified in the Development Plan.

The qualitative and quantitative deficiencies referred to within SPP8 would be met by appropriate floorspace developments at these locations, with specific reference to the opportunities identified within this Study.

In terms of SPP8, the requirements are capable of being met by these sites, subject to appropriate proposals. However, the Development Plan must be considered, also to discharge the last requirement of paragraph 39 of SPP8.

9.7.2 *Development Plan*

Development at these sites, to meet the identified qualitative and quantitative deficiencies, would meet two of the aims of the Structure Plan, in particular by minimising the need to travel and securing an equitable and accessible distribution of shopping facilities:

- *ensure that the population of Edinburgh and the Lothians has access to a full range of high quality shopping facilities, minimising the need to travel, and maximising the benefits to the local economy;*
- *secure an equitable, accessible and sustainable distribution of shopping facilities, with new development focused wherever possible in recognised town centre locations;*

Development at these sites would meet identified qualitative and quantitative deficiencies at appropriate scales, and the sites would be capable of being accessible to public transport and walking (Structure Plan policies RET 1 and RET 2). Also, such development to remedy deficiencies in local shopping facilities, and in areas of planned growth, is supported by policy RET 5.

The Local Plan underpins the status of Almondvale (Livingston) and Bathgate as sub-regional and district centres respectively, also other local neighbourhood centres, and aims to resist retail development out of these and other centres where development would detrimentally affect the identified town centres. Armadale, Broxburn and Whitburn are identified as significant growth areas with limited town centre opportunities and justification for development outwith the town centre, associated with local expenditure growth, and based upon sequential testing and other national policy and development plan requirements. Such development is supported by policy TC 9.

9.7.3 *Other Considerations*

Only site accessibility and policy fit have been considered. Detailed proposals would need to demonstrate wider suitability for development ie. in terms of flood risk, landscape and visual assessment, etc.

9.8 Conclusion

All of the sites identified within the three catchments (Armadale, Broxburn and Whitburn) meet the criterion of SPP8 that they should be capable of being made conveniently and safely accessible to all sectors of the community. Moreover, the sites within these three catchments meet the requirements of the Development Plan. The Candleworks site in Broxburn is a proposed site for retail development. However, there is no quantitative case for bringing forward all sites and detailed proposals would need to be scrutinised, along with an accompanying Retail Assessment for proposals in excess of 2,500 sqm gross. Moreover, suitability in terms of other development considerations would need to be demonstrated.

10 Conclusion and Recommendations

10.1 Conclusion

10.1.1 The Development Plan and National Guidance

The Local Plan has the aim of securing Almondvale (Livingston) town centre as the sub-regional centre and strengthening and enhancing Bathgate town centre as the district centre. The Local Plan also aims to sustain the vitality of local neighbourhood centres, encouraging retail and community facilities commensurate with their status, and to resist retail development outwith these identified centres where there would be a detrimental effect on the these centres. This respects the sequential requirements of the Structure Plan and national guidance. It is assessed that there is an oversupply of small retail units and this offers scope for consolidation around viable shopping cores.

In addition, the following specific points are made in the Local Plan:

- The sub-regional status of Almondvale (Livingston) is made clear, as is support for the expansion of its retail core.

- Bathgate is an asset of considerable importance, as the district centre, with a traditional character, and a significant growth area, although there are few potential development sites. The need to consider proposals against the vitality and viability of the town centre is stressed.

- Linlithgow is assessed as having adequate convenience floorspace to meet the existing local need.

- Other identified centres include Armadale, Broxburn, East Calder, Whitburn and Winchburgh, which will be subject to increased housing development. There are limited town centre opportunities within these centres.

It can be concluded that the centres identified, with the exception of Linlithgow, all have scope for retail development, that the roles of Almondvale and Bathgate need to be supported, and that there is scope for floorspace in the other centres based on future housing development, and also the possibility of consolidation around viable shopping cores.

10.1.2 *General Market Overview*

(a) Population is forecast to continue to increase, albeit at a slower rate. Major employers include managerial/administrative, customer service, electronics and specialist manufacturing. As a consequence, employment is slightly above the national average. There are small pockets of deprivation to the west of West Lothian, however Livingston, Linlithgow and the east of West Lothian are comparatively affluent.

(b) Tourism is the subject of an action plan, and the main opportunities are in Almondvale (Livingston) (related to the outlet centre) and Linlithgow, which offers the most scope for tourism-related retail benefits as the outcome of tourism initiatives.

(c) In terms of general retailing, the "credit crunch" and market downturn has impacted on non-food goods, but the grocery sector continues to grow. The sector is dominated by the "big 4" retailers – ASDA, Morrisons, Sainsbury and Tesco – but the acquisition of Somerfield by the consolidating Co-operative group will be likely to lead to a "big 5". This is significant as there is a major Scotmid/Co-op presence in West Lothian. The main food shopping trip may be declining in popularity, with an identified shift towards more fragmented top-up trips and the growing popularity of smaller format stores, such as Sainsbury Local and Tesco Metro. The non-food offer of superstores continues to increase, with ASDA leading the field, and this will increasingly compete with town centre comparison retailers. Finally, the Competition Commission inquiry into superstore retailing may lead to some changes in the planning system.

10.1.3 *Catchments*

West Lothian can be divided into eight catchments based around identified centres and future housing developments, supported by analysis of supermarket drive-time isochrones. These catchments form the basis of the retail capacity analysis.

10.1.4 *Shopping Survey*

The overwhelming dominance of Almondvale (Livingston) ASDA is clear from the survey results – this store takes nearly one-third of main food shopping from West Lothian. Superstore dominance is also demonstrated by the result that 20% of households shop in Bathgate Tesco, with more than one half of shoppers favouring two superstores. There are a number of underlying reasons for this, but there is some dissatisfaction with food shopping provision in Armadale, Bathgate and Whitburn. East Calder residents were overwhelmingly satisfied but it is thought they view Almondvale (Livingston) as their centre. The private car is the main mode of transport, with bus travel unpopular perhaps due to the difficulties of carrying shopping. However, public transport accessibility was generally viewed as adequate.

10.1.5 *Qualitative Analysis and Town Centre Assessments*

It is clear that there is scope for improvements in the centres of Armadale, Broxburn, Whitburn and Winchburgh in particular, following the appraisal of the town centres. Some of these improvements can be delivered through action planning and some through the masterplanning of new developments, but improvements should contribute towards the enhancement of the shopping environment and the retention of expenditure.

- Livingston/Almondvale (Livingston) is performing as a successful sub-regional centre, with large foodstores and smaller retailers serving six neighbourhood centres, and further expansion planned. Facilities are generally good or excellent although cycling facilities are lacking.

- Bathgate has a poor quality of retail for a High Street, with a high proportion of vacant units and charity shops, and the edge-of-centre Tesco serves as the primary food retailer. There is a choice of traditional convenience retailing. Facilities in Bathgate are generally excellent, good or acceptable although cycling facilities could be improved. There may be scope for improving mobility-impaired facilities, the conditions of buildings, information availability and leisure facilities. Bathgate is the subject of an Action Plan which should capture any issues and identify opportunities for improvement. The Airdrie-Bathgate rail link is also such an opportunity in terms of improved accessibility.

- Linlithgow has a traditional High Street with a diverse range of local and independent retail and numerous historic buildings, which enhance the character of the public realm but which offer little scope for larger retailers or expansion. There are two medium-sized superstores at either end of the town. There are a number of specialist and independent retailers, particularly as the town is a popular tourist destination. Linlithgow is generally excellent or good in terms of facilities, but cycling and mobility-impared facilities could be improved. There is a commitment to a Linlithgow Action Plan which should identify potential opportunities for improvements. In addition, there is a West Lothian Tourist Plan which focuses on Almondvale (Livingston) and Linlithgow, and the refurbishment of the Burgh Halls and integration of a visitor centre may provide further opportunities.

- Armadale has a limited retail offer, with smaller operators and traditional convenience retailers. Armadale could be enhanced in terms of buildings, public realm, cycling, environment and leisure. Armadale is the subject of an Action Plan commitment which should capture any issues and identify opportunities for improvement. Future large-scale housing development may also drive up the quality of the town centre.

- Broxburn has positive balance of independent and national retailers, with a small shopping centre and medium-sized foodstores, also a range of independent and specialist grocers including a Polish delicatessen. There are a number of larger vacant units. Broxburn could be enhanced in terms of buildings, public realm, cycling, information and leisure. There is a commitment to a Broxburn/Uphall Action Plan which should capture any issues and identify opportunities for improvement. Future large-scale housing development may also drive up the quality of the town centre.

- East Calder is a small settlement with limited retail provision, only one main foodstore. The future of East Calder is very much dependent upon the Core Development Area and large-scale housing development, including masterplanning opportunities.

- Whitburn lacks quality convenience retail for a town of its size, with a mix of small nationals and independent grocers and one discounter with a larger floorplate. Whitburn could be enhanced in terms of buildings, public realm, cycling, environment and leisure. The town is the subject of an of an Action Plan commitment which should capture any issues and identify opportunities for improvement.

- Winchburgh has only basic retail provision. The future of Winchburgh is very much dependent upon the Core Development Area and large-scale housing development, including masterplanning opportunities. The railway line offers a significant opportunity and public transport will need to be improved.

10.1.6 *Retail Capacity*

The significant flow of expenditure from surrounding catchments to Almondvale (Livingston) was evident from the surveys. Also, the relative lack of leakage from West Lothian should be highlighted as there is limited scope to claw back leakage. It is clear that there are imbalances in foodstore provision to the west of West Lothian in particular, and that Linlithgow is very well self-contained.

The main focus is on retaining expenditure in the catchments without prejudice to the sub-regional centre of Almondvale (Livingston) and the district centre of Bathgate, both in terms of current opportunity and in terms of future demand from housing development and new population.

Four scenarios were devised to consider varying degrees of retention of spend. In all of these scenarios it was assumed that Almondvale (Livingston) was importing too much expenditure, and targets should be set for the other catchments based upon the retention of expenditure. Of these, two scenarios were taken forward.

- Scenario 1 (Maximum floorspace): 80% Bathgate and Linlithgow; 70% Others

- Scenario 3 (Precautionary): 80% Bathgate and Linlithgow; 60% Others

Floorspace opportunities were identified from these two scenarios in two periods, up to 2016 and from 2016 to 2026, taking into account future consented floorspace, additional population and expenditure growth. Sensitivity testing was carried out based upon lower housing growth. Table 10.1 below summarises the output:

Table 10.1: Forecast Retail Balance and Net Floorspace Opportunity – Projected Capacity

Catchment	**Projected Capacity**			
	Opportunity to 2016		**Opportunity to 2026**	
	Scenario 3 80%/60%	**Scenario 1** 80%/70%	**Scenario 3** 80%/60%	**Scenario 1** 80%/70%
Armadale	£12m 845 – 1,708 sqm	£15.7m 1,109 - 2,243 sqm	£5.3m 261-527 sqm	£6.4m 304 – 615 sqm
Broxburn	£8.4m 591 – 1,194 sqm	£12.7m 897 – 1,813 sqm	£6.5m 360 – 728 sqm	£7.7m 408 – 824 sqm
East Calder	£13m 916 – 1,853 sqm	£15.4m 1,087 – 2,198 sqm	£7.2m 373 – 755 sqm	£8.5m 436 – 881 sqm
Whitburn	- -	£2.9m 203– 410 sqm	£1.5m 96 – 194 sqm	£5.9m 361– 729 sqm
Winchburgh	£6.3m 443 – 895 sqm	£7.6m 537 – 1,085 sqm	£7.6m 444 – 897 sqm	£8.9m 518 – 1,047 sqm

(turnover figures are rounded)

There are also a number of general observations, in addition to the opportunities identified above.

- There is no retail capacity in Almondvale (Livingston). However, there may be a case for further floorspace in certain circumstances, either for Almondvale or for a wider catchment area (including East Calder). Nevertheless, there should be a presumption against further floorspace unless it is for a clear need (new local neighbourhood centres) and it is demonstrated (through a retail assessment) that there is no unacceptable impact on other centres or the strategy of retaining expenditure in other catchments.

- There will be no retail capacity in Bathgate due to existing consents.
- There is unlikely to be additional retail capacity in Whitburn beyond a small foodstore or an extension of floorspace due to an existing consent.
- There will be no retail capacity in Linlithgow due to its satisfactory current retention levels, the modest increase sought and lack of significant future housing allocations.
- There is retail capacity in Armadale, Broxburn, East Calder, Winchburgh and Whitburn (limited).
- Impacts on Almondvale (Livingston) and Bathgate may be mitigated to a limited extent if internet spending is drawn from stores within these catchments – however, this is an unknown dynamic and applies to a small amount of expenditure, approximately £1m.
- Almondvale (Livingston) may be sustained by an unknown quantum of expenditure from beyond the study area, in terms of linked trips to comparison shopping and possibly work-related trips. This could be established through in-centre surveys, possibly as part of to a future comparison goods study.
- Almondvale (Livingston) could be sustained by spend from East Calder if this was viewed as appropriate. In this case, the East Calder floorspace opportunity would be combined with the Almondvale catchment as a wider catchment. Alternatively, retail floorspace in East Calder could be developed in the longer term beyond 2016, following substantial housing completions, with trade continuing to flow to Almondvale.
- Bathgate could be sustained by spend from Armadale and/or Whitburn in the same way as Almondvale/East Calder in the short-to-medium term by delaying floorspace until substantial housing completions have occurred, beyond 2016, with expenditure continuing to flow to Bathgate. However, there is a clear need for floorspace in Armadale and committed floorspace in Whitburn.
- Armadale and Whitburn could be combined into a larger Armadale/Whitburn catchment to provide a "critical mass" for a larger floorspace opportunity in either Armadale or Whitburn serving both catchments.

10.1.7 *Accessibility of Catchments and Suitability of Sites*

The accessibility of sites with market interest was considered. All the sites are out-of-centre, but all are capable of supporting floorspace. There are various specific accessibility requirements which would have to be met, and some guidance is provided with regard to these.

In general, there is an inequality of access to foodstores in the west of West Lothian, reflected in the flow of expenditure to Almondvale (Livingston). The take-up of sites in Armadale or Whitburn would redress this inequality of access.

Public transport coverage is generally acceptable, despite the fact that it is not well-used for food shopping trips.

All identified sites are potentially suitable in terms of accessibility and policy fit, although there is no quantitative case for development on all of the identified sites, and retail assessments would be expected for development proposals.

10.2 Recommendations

Recommendation 1. Floorspace proposals for opportunities identified in this study must be scrutinised in terms of the roles of the centres as identified in the Local Plan.

Recommendation 2. The relative deprivation in the western settlements should be a consideration in prioritising these areas for future floorspace provision.

Recommendation 3. Tourism opportunities in Almondvale (Livingston) and Linlithgow should be considered as a means of achieving increased retention of expenditure and linked shopping trips, through the Tourism Plan.

Recommendation 4. Changing food shopping patterns and wider market changes should be considered in meeting floorspace opportunities, including scope for smaller format foodstores located within, or closer to, town and neighbourhood centres than traditional format superstores.

Recommendation 5. Opportunities for qualitative enhancements identified in this study and in other studies should be pursued through the planned Town Centre Action Plans, with the scope for increased retail potential and retention of spend used as justification.

Recommendation 6. The Council should give consideration to the optimum scenario, or combination of scenarios, for supporting retail development, in order to inform Recommendation 7.

Recommendation 7. The following quantitative floorspace opportunities, or combination of opportunities where there is a compelling justification, should be considered in two phases to 2016 and from 2016 to 2026:

(a) Armadale – a priority for floorspace provision ranging from 845 to 2,243 sqm until 2016, and 261 sqm to 615 sqm from 2016 to 2026. This opportunity could be combined with Whitburn (see sub-paragraph (d) below).

(b) Broxburn – a priority for floorspace provision ranging from 591 to 1,813 sqm until 2016, and 360 sqm to 824 sqm from 2016 to 2026.

(c) East Calder – an opportunity exists for 916 sqm to 2,198 sqm to 2016 and 373 sqm to 881 sqm from 2016 to 2026. This opportunity could best be delivered as part of a masterplan for the Core Development Area, or as part of the wider Almondvale (Livingston) catchment to meet an identified need.

(d) Whitburn – there is scope for modest floorspace or an extension of up to 729 sqm. However, consideration could be also given to meeting the opportunity through a combination with the Armadale floorspace opportunity, a combined floorspace opportunity serving both the Armadale and Whitburn catchments.

(e) Winchburgh – an opportunity exists for between 443 sqm and 1,085 sqm in the period to 2016 and 444 sqm to 1,047 sqm beyond this. However, consideration should be given to delaying this opportunity until beyond 2016 as it is predicated on future demand with no existing need.

Recommendation 8. No further floorspace opportunities should be permitted in Bathgate or Linlithgow, or in Almondvale (Livingston) unless, in the case of Almondvale, it is to meet an identified need and has no unacceptable retail impact on other centres or the strategy of retaining spend in other catchments.

Recommendation 9. Retail assessments are expected for foodstore planning applications designed to meet the opportunities in Recommendation 7, where the proposal is in excess of 2,500 sqm gross.

Recommendation 10. The housing assumptions underpinning this retail capacity analysis, and the sensitivity testing table in this analysis, should be tested against housing completions and subject to ongoing review.

Recommendation 11. The methodology and output of this Study should be considered in the commissioning of further studies for convenience goods and comparison goods within the wider City Region.

Recommendation 12. This Study should be replaced by 2016, ideally as part of the development plan process to provide plan certainty for the following period.