

Floorspace Survey's overview

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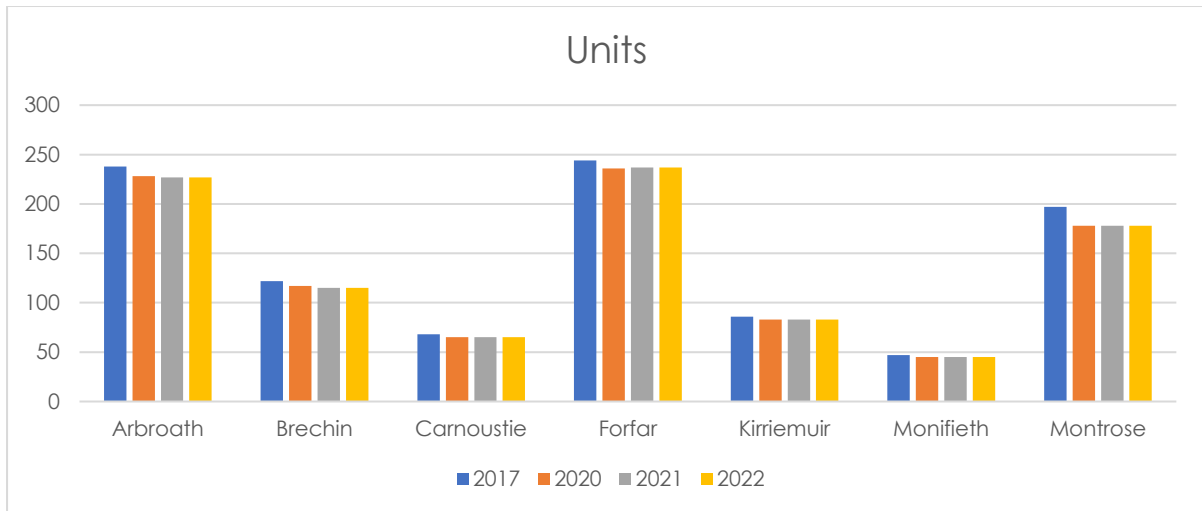
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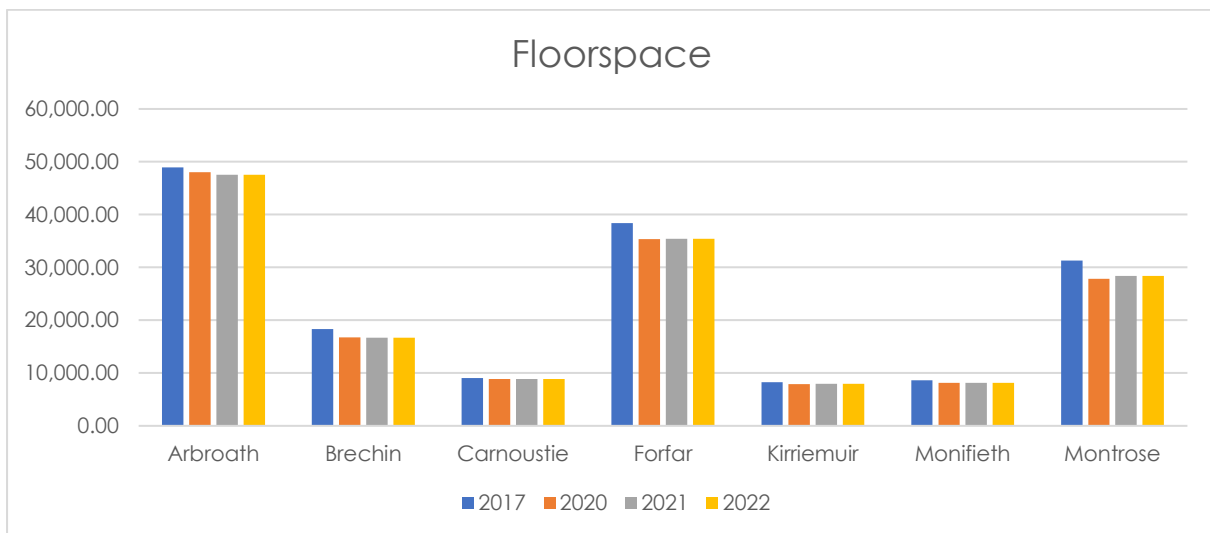
TOWN CENTRE OVERVIEW

Units & floorspace

The number of units varies in Angus, with the larger towns of Arbroath, Forfar and Montrose having the highest number of units. The highest number of units is observed in Forfar, and the lowest number is observed in Monifieth. The number of units has contracted in all of the towns from 1002 units in 2017 to 950 in 2022.



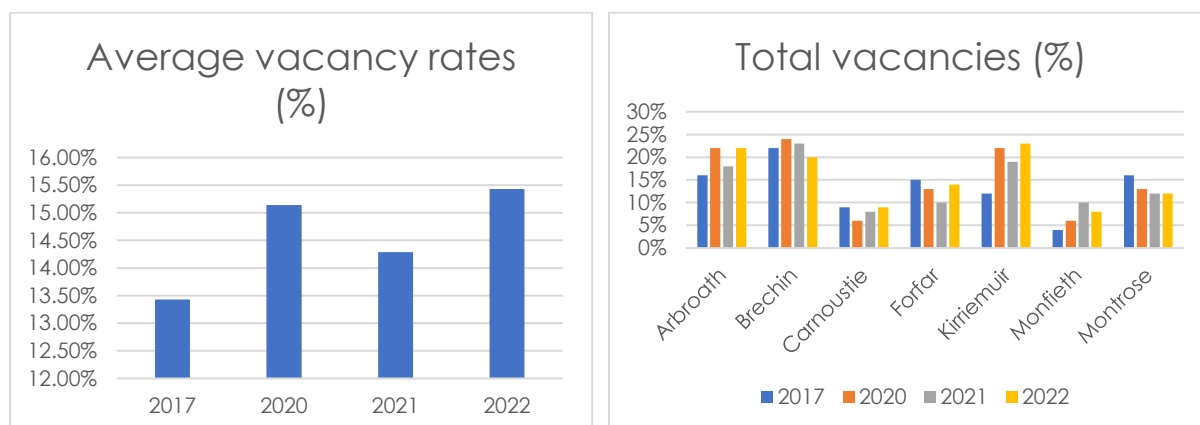
Similar trends are observed in floorspace, where the total floorspace has contracted in all of the towns, from a total of 162,940.92 in 2017 to 153,094.45 in 2022.



Units which are no longer within the scope of the floorspace survey are for a number of reasons, this includes: buildings which have been demolished; units which are now holiday lets or in residential use; stores which form part of a wider business; businesses which the assessors roll, and onsite surveys do not identify any clear use; and for uses out with the assessors use classifications.

Vacancies

The Scottish Local Authorities Economic Development Group (SLAED) indicators demonstrate that the average vacancy rate in Scotland's town centres was 12.5% for the period 2021/2022, an increase from 9.2% in 2020/2021. The average vacancy rate in Angus is higher than the Scottish average at 15.41% in 2020 in terms of total vacancies (vacant retail/service & vacant other), decreasing to 14.29% in 2021, and increasing again in 2022 to 15.43%.

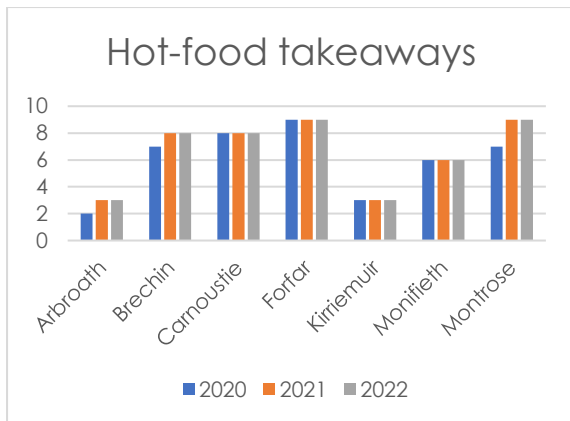


Recognising the significant impact of Covid 19 restrictions, in addition to existing impacts, we have been monitoring town centre performance annually. We have observed that although there was an increase in total vacancy rates in the period 2017-2020, Angus's town centres went through a period of recovery in the period 2020-2021. Covid recovery, coupled with additional pressures in 2022, have however resulted in an increase of total vacancy rates in Angus in the period 2021-2022.

Trends are not consistent across all of Angus's towns, Carnoustie & Monifieth, which are the smallest of Angus's towns centres, with the lowest level of units, continue to see very low numbers of vacancies below national averages with 9% & 8% respectively. This is in contrast with Arbroath, Brechin and Kirriemuir which have high levels of vacancies, with 22%, 20% & 23% respectively. Although national and local trends demonstrate an increase of vacancies in town centres, vacancies in Brechin have decreased from 2020, and vacancies in Montrose have decreased from 2017.

Non-retail clusters

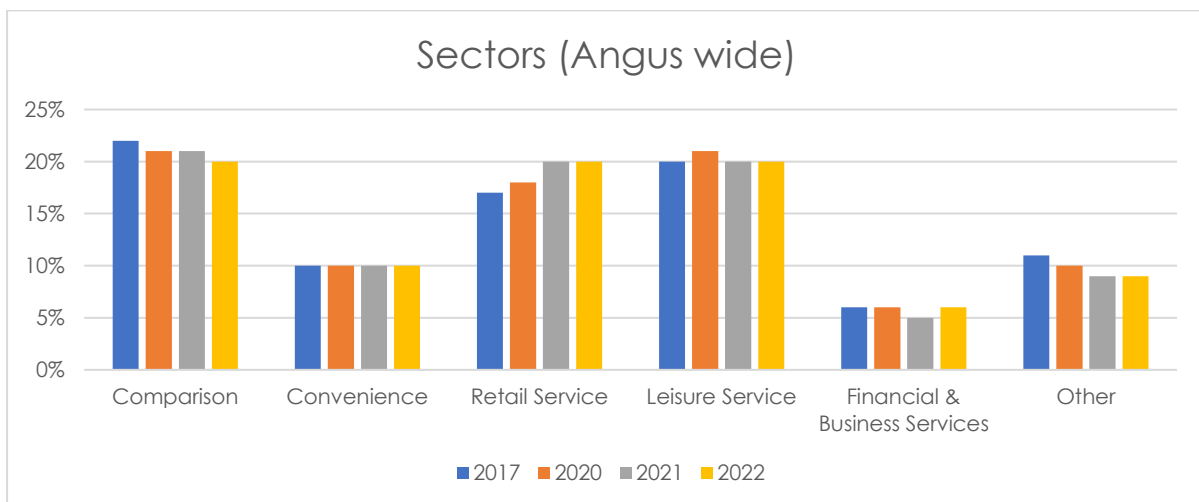
Local development plans are expected to ensure that town centres are not negatively impacted by the clustering of certain types of non-retail uses (hot-food takeaways, betting shops & payday loan shops). Therefore, as part of recent floorspace surveys, we have recorded and will continue to monitor clustering of hot-food takeaways, betting and pay day loan shops to ensure levels do not have a negative impact on well-being.



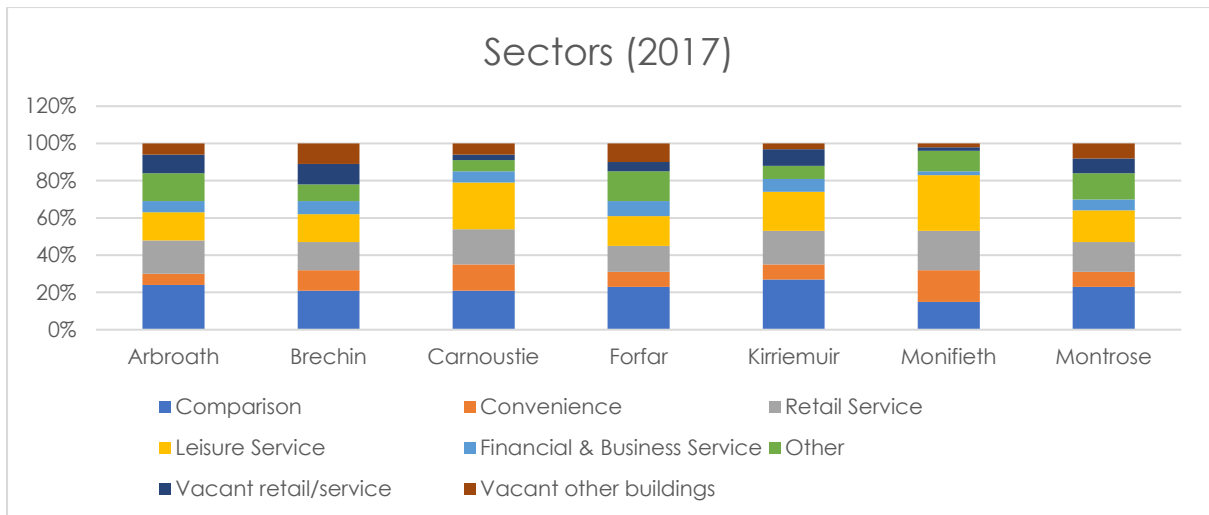
In the period 2020-2022 the level of hot-food takeaways has remained fairly consistent, with small increases in Arbroath & Montrose. The level of betting shops has also remained consistent, with no increase in any of the towns.

Sectors

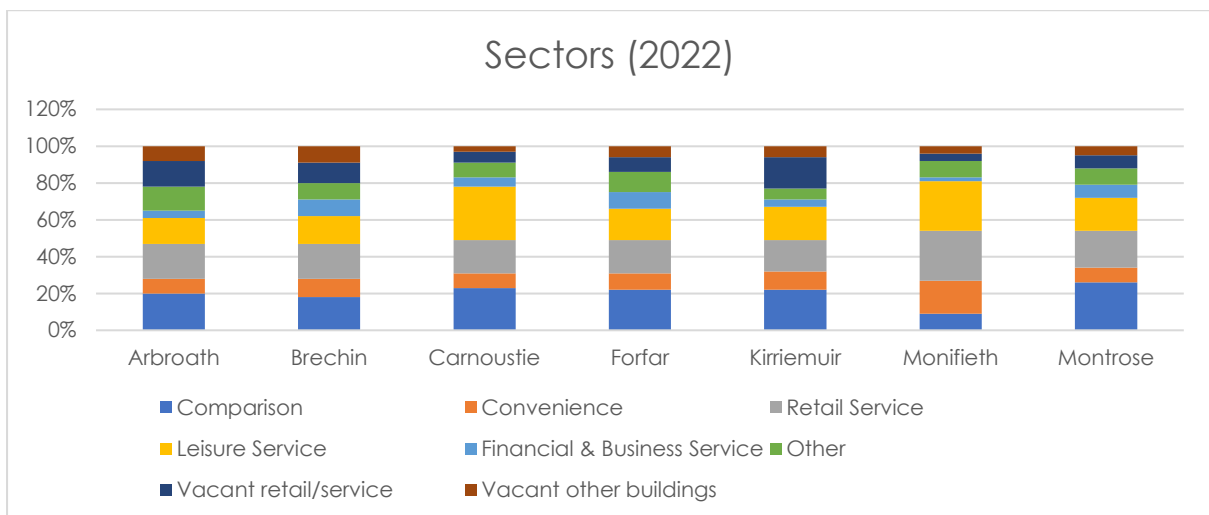
Across Angus, comparison retail has maintained a strong presence from 2017, although it has seen a decline from 22% in 2017, to 20% in 2022. Retail service has increased from 2017 from 17% to 20% in 2022, reaching the same level as comparison retail. Leisure service remains at 20%, increasing in 2020 before decreasing to 20% again in 2021, and remaining at 20% in 2022. Financial & business services have the smallest presence in Angus' town centres with 6% in 2017, decreasing to 5% in 2021, before increasing to 6% in 2022.



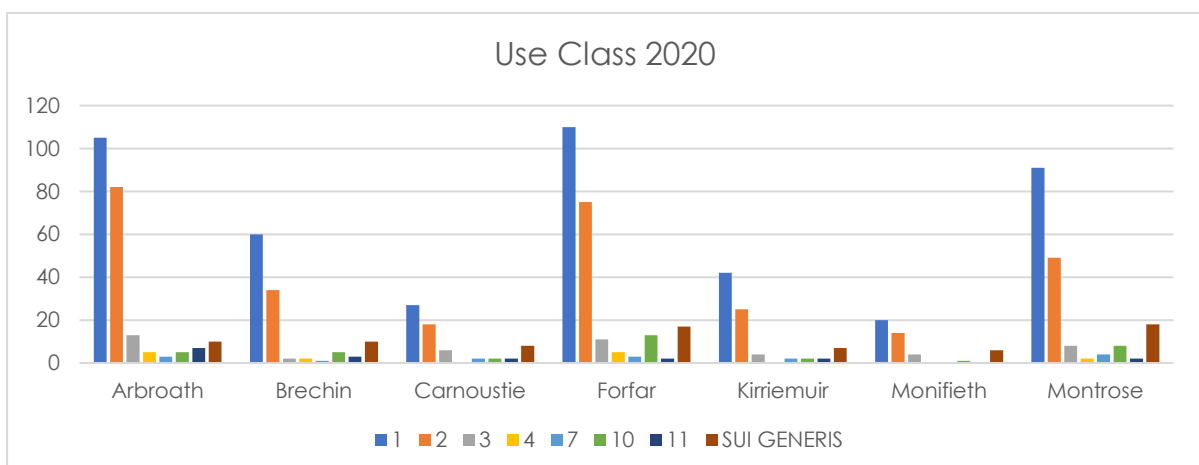
Each of the towns in Angus has a unique character and function, and as a result, the type of businesses which operate in the town centres differ from town to town. Data demonstrates that comparison retail was the most prominent sectors in Arbroath, Brechin, Forfar, Kirriemuir & Montrose in 2017, whereas leisure service was the most notable sector in Carnoustie and Monifieth. Retail service maintained a fairly strong presence in all of the towns in 2017 with financial and business service maintaining the smallest presence.



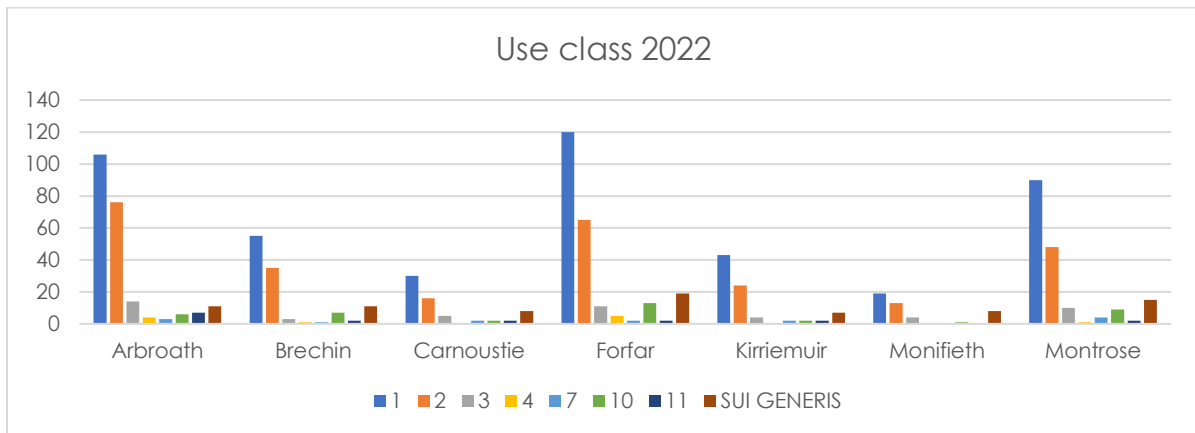
In 2022, comparison retail remained the most prominent sector in Arbroath, Forfar, Kirriemuir and Montrose. In Brechin, retail service was the most prominent sector in 2022, and jointly with leisure services in Monifieth. In Carnoustie leisure was still the most dominant sector.



Use class



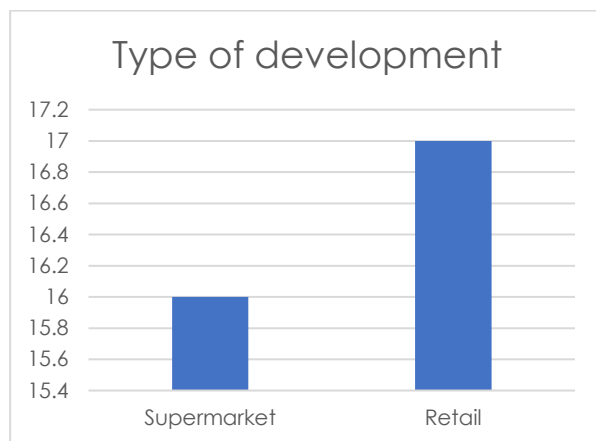
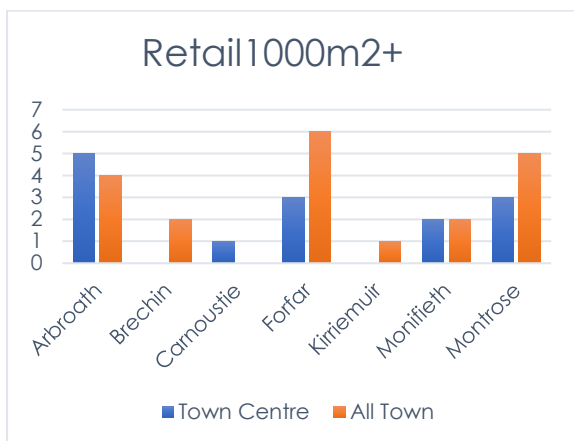
There are no significant changes to use class in town centres across Angus from 2020-2022, with Class 1: Retail dominating all of the town centres, followed by Class 2: Financial and professional services.



Retail exceeding 1000m2

In accordance with the network of centres, as detailed in the Angus Local Development Plan 2016, Arbroath, Forfar, and Montrose have the highest level of retail developments in excess of 1000m2. The nature of the development varies in the larger towns, for example, the demand in town centre locations is for large scale retail units, which with the exception of Arbroath, exclude supermarkets. Of the overall 32 units which exceed 1000m2, 17 units are non-food retail units, and 16 of the units are supermarkets.

Out with the town centres, the large-scale units consist of supermarkets, retail parks, and large homeware and furniture retailers. Each of the smaller towns are served by supermarkets, with both Carnoustie & Monifieth's supermarkets located within the town centre. Brechin & Kirriemuir's supermarkets, while in close proximity, are out with the town centre. In addition, Monifieth has large retail units located at Eithiebeaton Retail Park.



Drive throughs

Existing drive throughs are located in each of Angus' larger towns: Arbroath, Forfar & Montrose, and additionally in Monifieth in the Dundee fringe area. All of the facilities are located in trunk road locations: Arbroath A92, Forfar A90, Monifieth A92, and Montrose A92, forming part of roadside facilities and services.

ARBROATH	
KFC	Westway Retail Park
McDonalds	Westway Retail Park
FORFAR	
KFC	Orchardbank Business Park
McDonalds	Orchardbank Business Park
Starbucks	Orchardbank Business Park
MONIFIETH	
Costa	Eithiebeaton
McDonalds	Eithiebeaton
MONTROSE	
Starbucks	Euro Garages, North Esk Road

Out of town, neighbourhood & rural retail

Out of town retail

Angus only has 2 allocated out of town retail locations, based at Eithiebeaton Retail Park in Monifieth, which is an established comparison retail, leisure, and visitor location, and the Westway Retail Park in Arbroath, which includes a supermarket, retail warehouse units, and drive through restaurants. With the exception of a new coffee shop and drive through, and the opening of a leisure facility at Eithiebeaton Retail Park, levels of activity have remained fairly consistent. Both Eithiebeaton Park & Westway Retail Park are fully occupied.

Although not an allocated out of town retail location, Brechin Road, Montrose sites a number of large-scale units, which includes a homeware store, frozen food supermarket and coffee shop, complementing the existing supermarket.

Development has successfully been directed in accordance with the network of centres, with developments for large retail development directed to the larger towns, and development of proportionate scale being directed to the smaller towns where supported by policy.

Neighbourhood retail

Outwith town centres, the plan allows for small local convenience shops within development boundaries, although performance is monitored as part the floorspace survey (all-town survey) it is not specifically focussed on the neighbourhood centres. However, as neighbourhood centres provide a key role in 20-minute living, future surveys will identify and monitor neighbourhood centre performance.

Service Centres & Rural Retail

The plan allows for small local convenience shops in villages, and small-scale retail development rurally where it is contributing to the diversification of the rural economy. The 2019 Community & Rural Services Survey showed that the rural service centres of Edzell, Friockheim, Glamis & Letham have a retail presence. However, the viability of rural shops remains an issue with only a small number of village shops remaining across Angus in Birkhill & Muirhead, Hillside, Monikie, Newbigging, Newtyle, Wellbank and Westmuir.

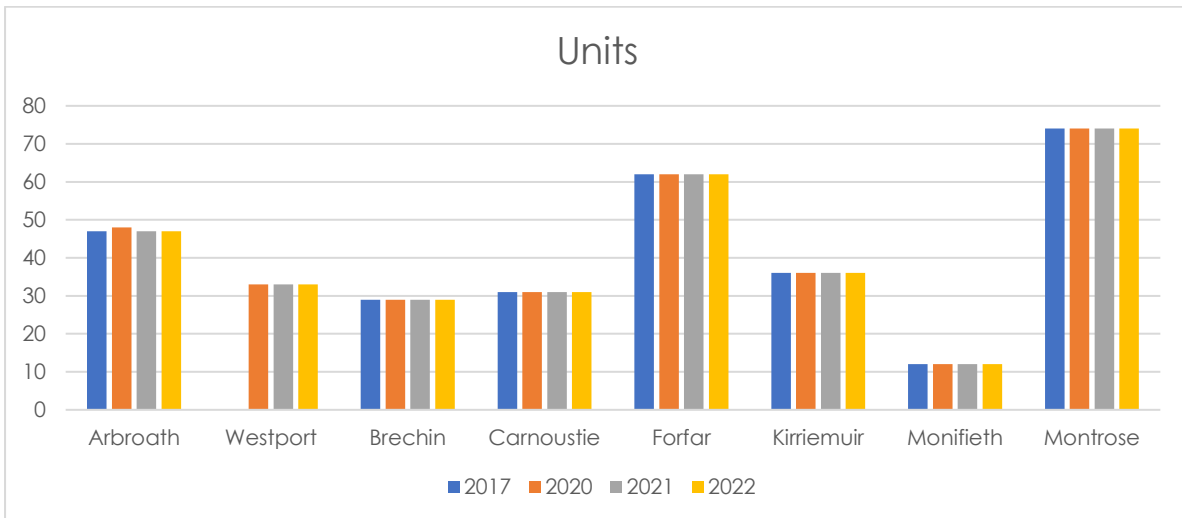
As supported by the Local Development Plan, rural diversification has a presence across Angus in the form of farm shops, many of which also offer tourism opportunities with ancillary cafe facilities. Many existing businesses strengthened their retail presence during COVID 19 restriction periods by offering local communities' access to necessary convenience goods.

The retail floor space survey undertaken to monitor the performance of our town centres does not currently extend to the service centres or rural settlements in Angus. However, businesses in these locations offer vital services to communities and it is important in future we develop strategies to monitor performance, particularly as digital services are further developed across Angus providing opportunities for businesses to form, evolve, and diversify to contribute to a further emerging digital economy.

CORE RETAIL AREAS

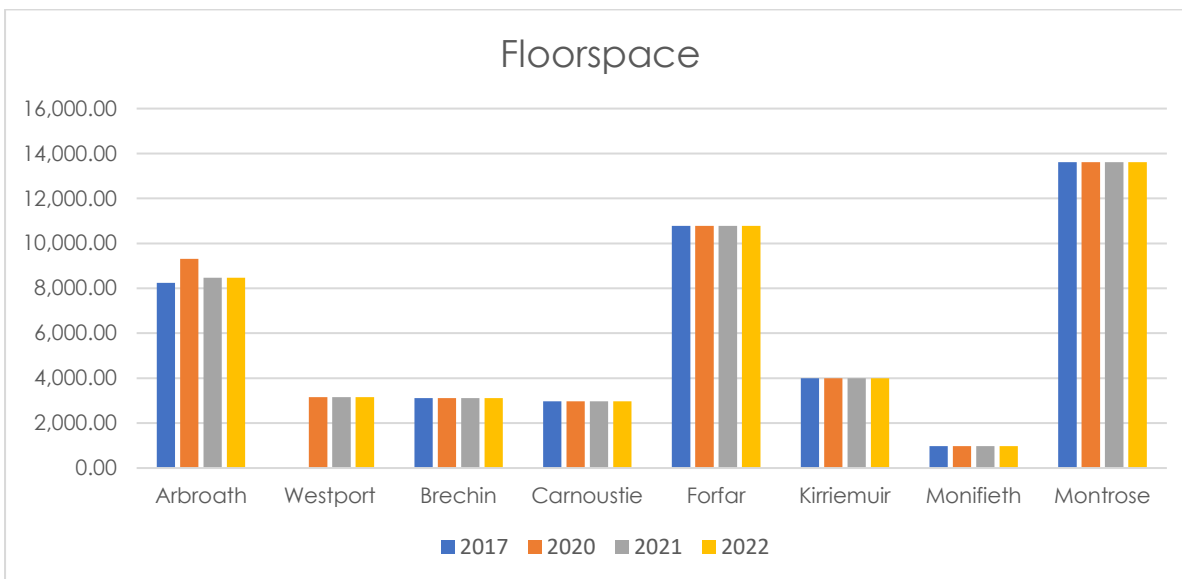
Units & floorspace

The number of units varies in Angus' core retail areas, with the larger towns of Arbroath, Forfar and Montrose having the highest number of units. Montrose has the highest number of units in Angus, with the lowest number of units is in Monifieth. The number of units has remained fairly consistent at a total of 291 units in 2017, increasing to 324 in 2022, as a result of Arbroath West Port core retail area being included in the survey from 2020.



Data is unavailable for Westport in 2017, as it was not surveyed as part of the wider floorspace survey

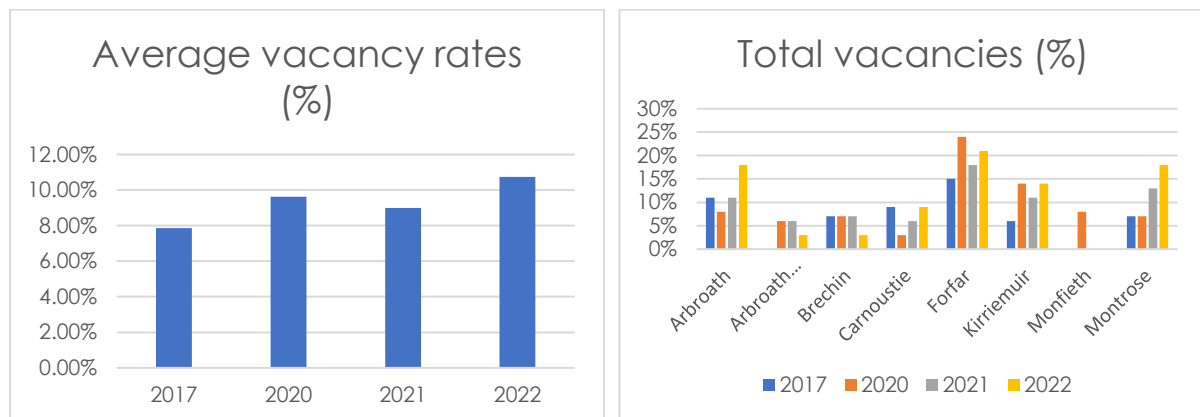
Similar trends are observed in floorspace, where it has maintained fairly consistent levels from a total floorspace of 43,696.85 in 2017 increasing to 47,076.49 also as a result of Arbroath West Port's inclusion in the survey from 2020.



Data is unavailable for Westport in 2017, as it was not surveyed as part of the wider floorspace survey

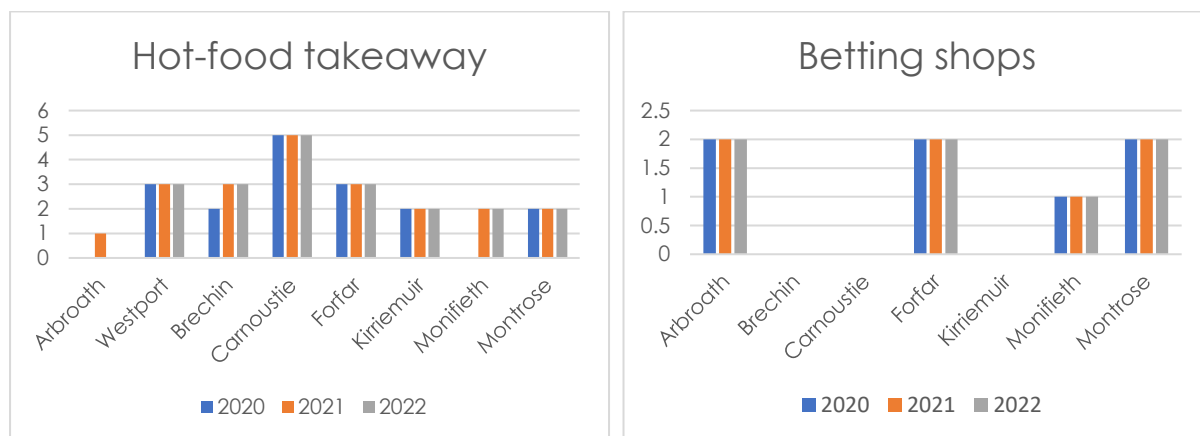
Vacancies

The average vacancy rate across Angus' towns' core retail areas is 10.75% in 2022, in comparison to 15.41% across the town centres, indicating that performance in the concentration of the core retail area's is outperforming the wider town centres. Vacancy rates differ across the towns, with Forfar having the highest vacancy rates consistently across the 2017-2022 period, with the highest reaching 24% in 2020, but decreasing to 21% in 2022. The lowest rates observed are in Monifieth with 0% vacancies in 2022, closely followed by Brechin & Arbroath (Westport) with 3% in both core retail areas.



Non-retail clusters

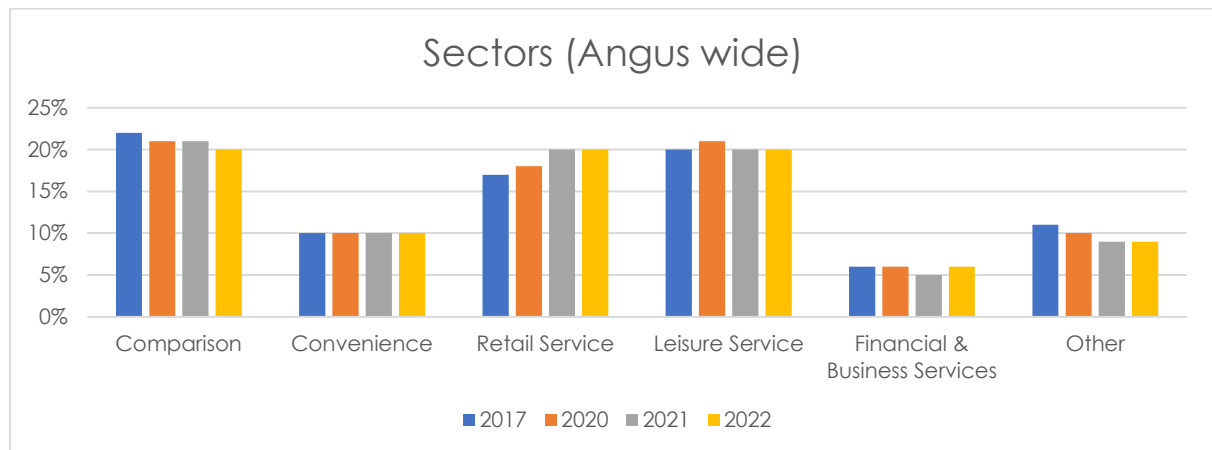
Monitoring of non-retail clusters has also been extended to include core retail areas.



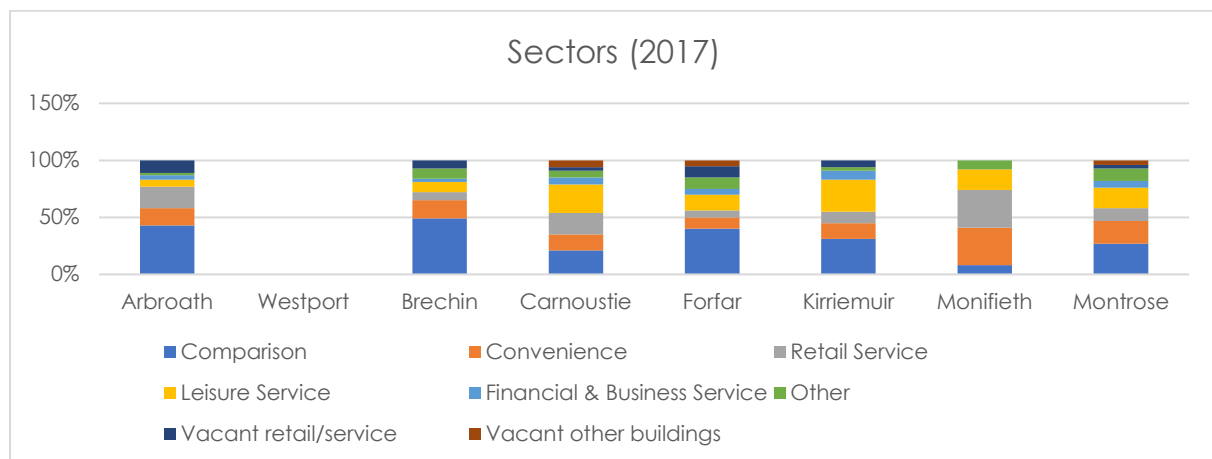
In the period 2020-2022 the level of hot-food takeaways has remained fairly consistent, with small increases in Brechin. The level of betting shops has also remained consistent, with no increase in any of the towns.

Sectors

Similar trends to the wider town centres are observed within the core retail areas across Angus, where comparison retail has maintained a strong presence, despite a decline from 22 % in 2017 to 20% in 2022. Retail service has increased from 17% in 2017 before levelling out to 20% between 2021-2022. Leisure service maintain similar levels, with a small increase in 2020 before falling to 2017 levels in 2021. Financial services have maintained the smallest presence, despite an increase from 4% to 5% between 2021-2022.

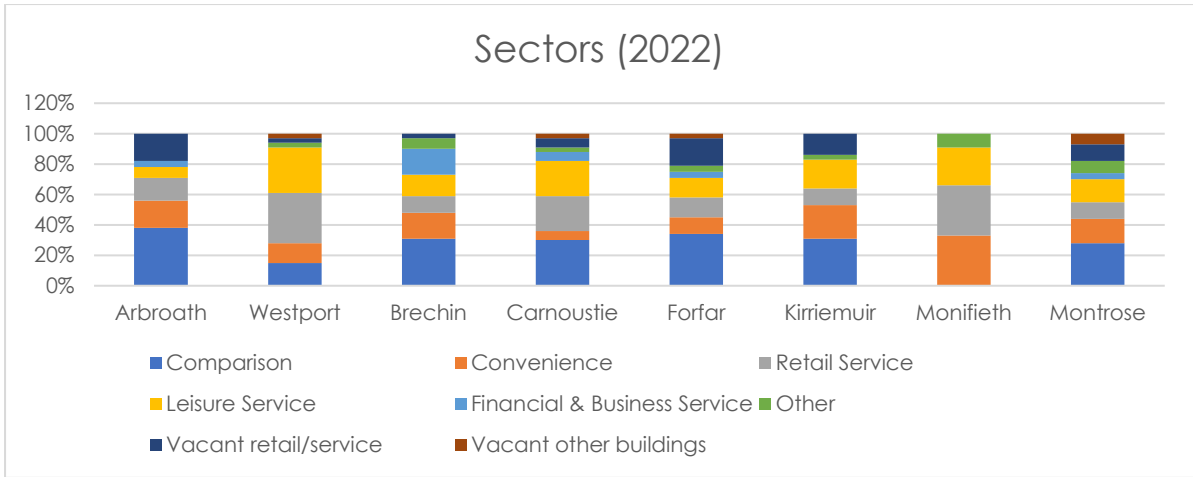


Trends differ across the towns, with Arbroath, Brechin, Forfar, Kirriemuir & Montrose having the strongest comparison sector, however in Carnoustie leisure was the most prominent sector, and retail service was most prominent in Monifieth.

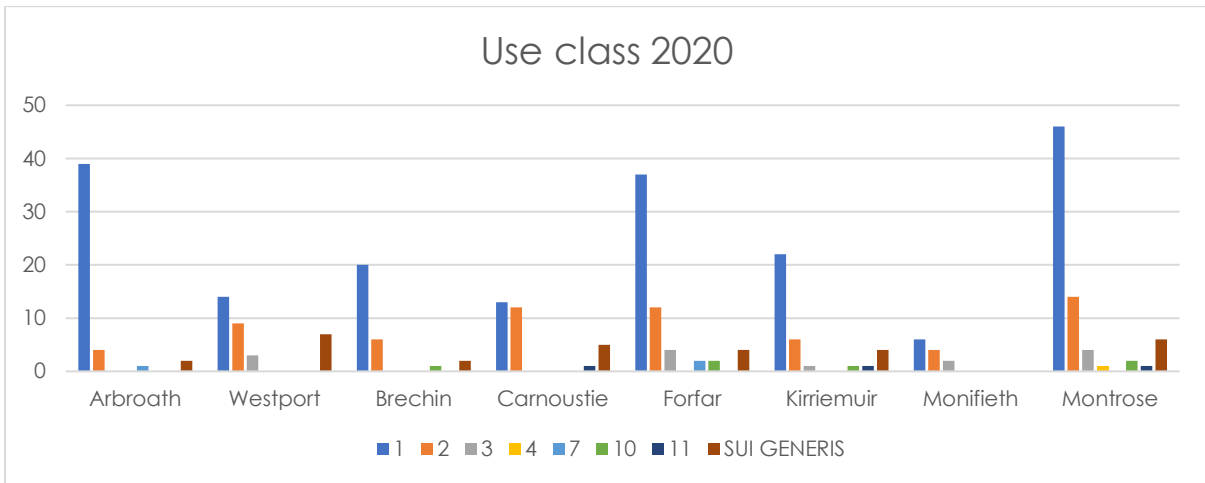


Data is unavailable for Westport in 2017, as it was not surveyed as part of the wider floorspace survey

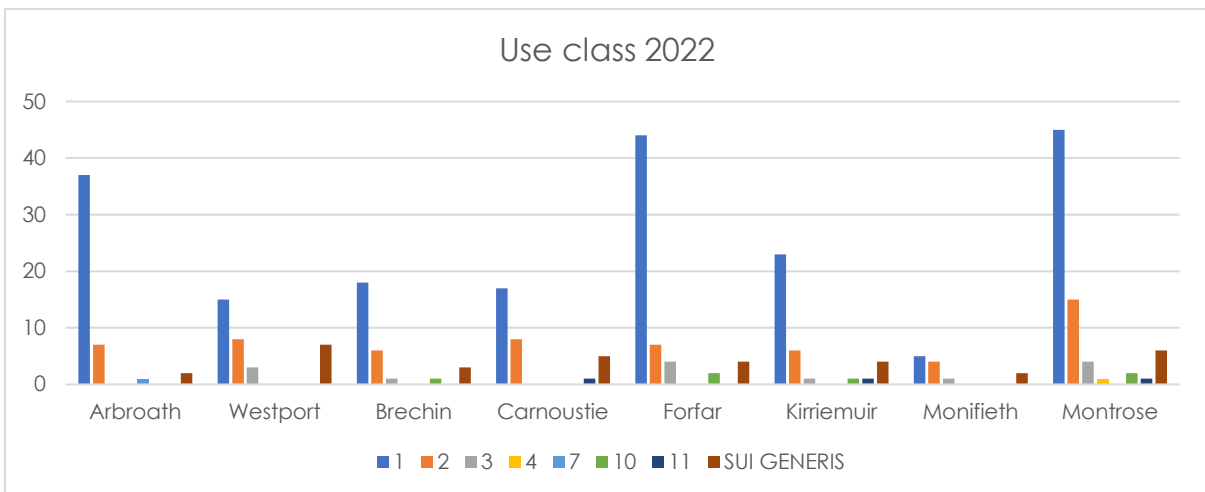
Comparison retail maintained the strongest presence in Arbroath, Brechin, Kirriemuir & Montrose in the core retail areas in 2022. However, in Carnoustie comparison retail had the strongest presence. In Monifieth, comparison retail has no presence at all in 2022.



Use Class



Similar trends in use class are observed across the towns' core retail areas, with use class 1 the most prominent. The retail function has therefore been preserved in these areas, as prioritised by policy.

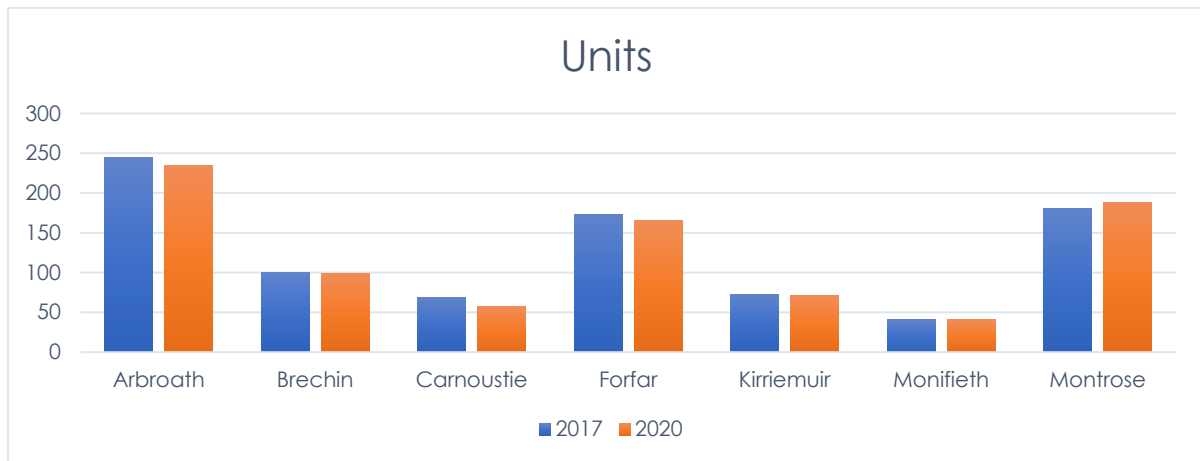


ALL-TOWNS

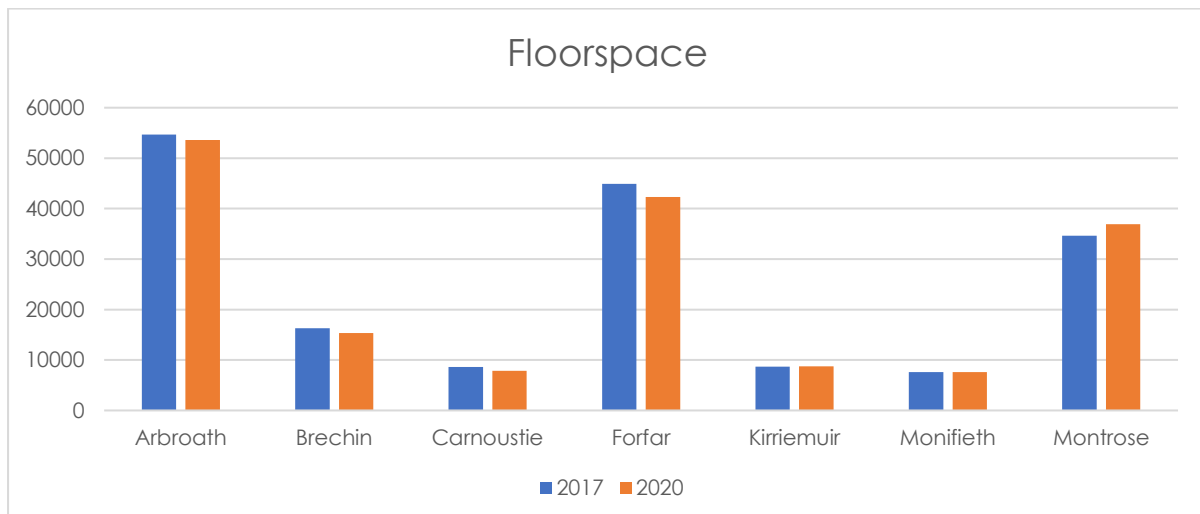
Units & floorspace

The all-town survey monitors comparison retail, convenience retail, retail service and vacant retail & service all within the defined development boundary, out with the town centre.

The total number of units in all of the all-town survey areas was 882 in 2017, reducing to 857 in 2020. The number of units in all of Angus's towns has reduced, with the exception of Montrose, which increased in the period between 2017-2020, from 181 to 188 units. This is a result of businesses entering the scope of the survey and now falling within the defined retail sectors, and with the opening of new stores within the Brechin Road development. This demonstrates retail contracted across most of the towns in the all-town survey areas.

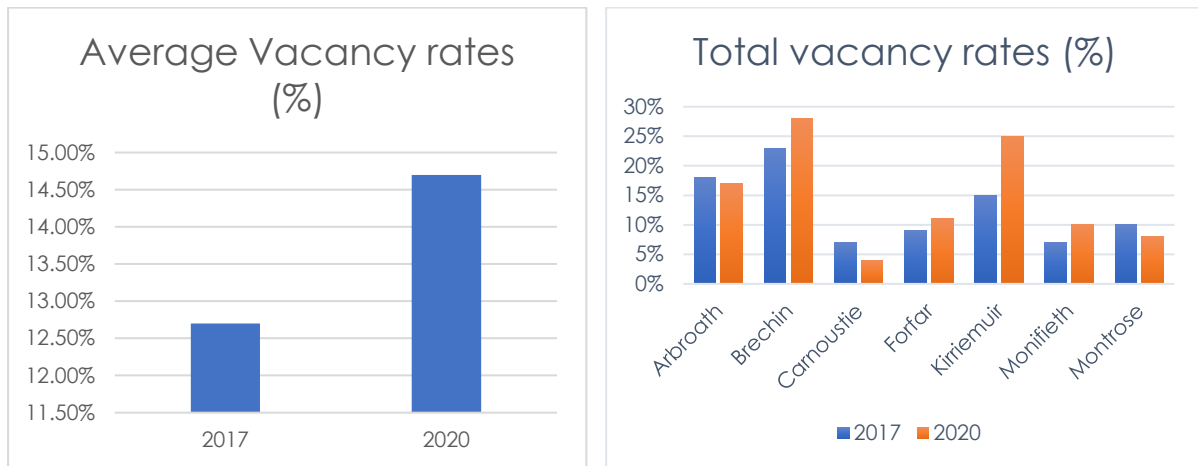


Similarly, floorspace decreased across the towns from a total of 175,478.83 in 2017 to 172,332.21 in 2022, with the exception of Montrose which increased between 2017-2020, again as a result of units entering the scope of the survey.



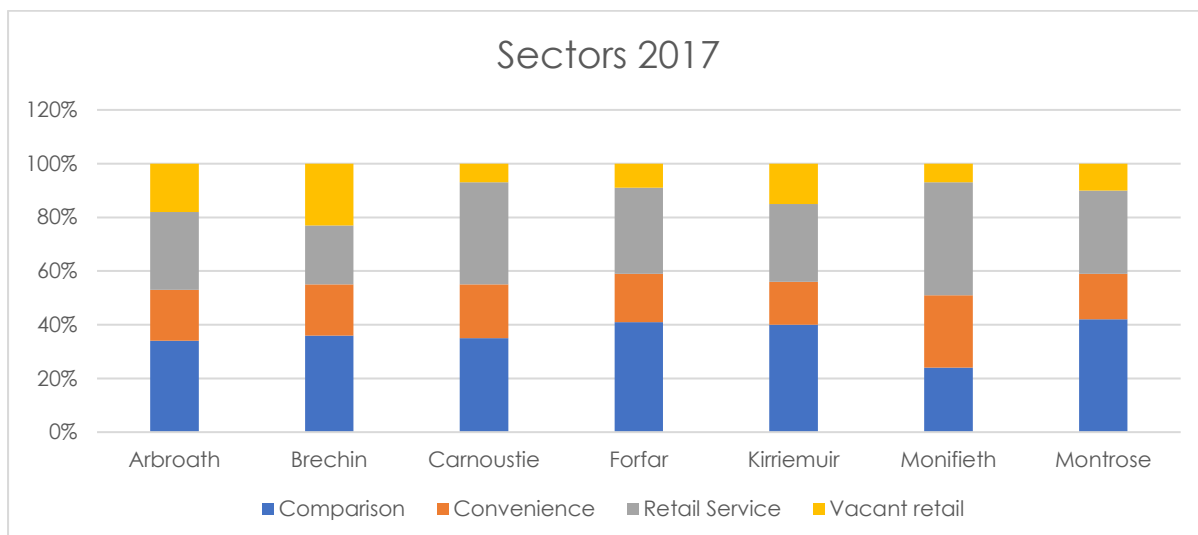
Vacancies

The total average vacancy rate across Angus' towns in 2020 was 14.7%, in comparison to 12.7% in 2017, an increase of 2% overall. However, vacancy rates differ across the towns, with Arbroath, Carnoustie, and Montrose all showing a decline in retail vacancies between 2017-2020. Brechin, Forfar and Kirriemuir have all seen an increase in vacancies in the same period.



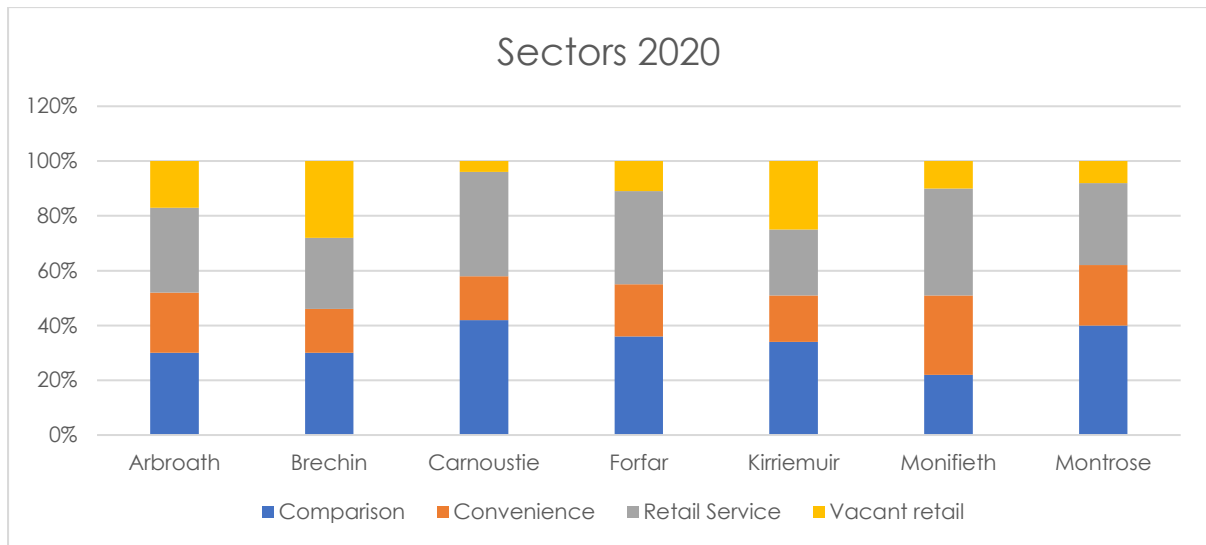
Sectors

Across the majority of Angus' towns, comparison retail was the most dominant sector, with 5 of the 7 towns following this trend in 2017. In Carnoustie & Monifieth, retail service was the most dominant.



Similar trends are observed in 2020, with comparison retail the most dominant sector in 5 of the 7 towns. However, in Arbroath comparison retail has contracted and retail service has expanded to the most dominant sector, and

it also remains the strongest sector in Monifieth. In Carnoustie, comparison retail has increased to become the most dominant sector.



GLOSSARY

Angus Local Development Plan 2016

Angus Council's adopted plan of how the area should develop from 2016-2026, directing development to the right locations

All-town

a survey area which includes everywhere within a development boundary, excluding the town centre and core retail area

All town surveys

a survey undertaken in the all-town area, which monitors retail-based activity within a defined time period

Comparison retail

a defined sector used by the Scottish Assessor which includes shops that sell goods such as clothing, electrical goods, hardware & homeware

Convenience retail

a defined sector used by the Scottish Assessor which includes shops that sell everyday items, such as food & drink, newspapers, and tobacconists

Core retail area

an area defined in the Angus Local Development Plan 2016, which identifies where there is a high level of retail which is currently protected to maintain vibrancy

Core retail area survey

a survey undertaken within the defined core retail area to monitor business activity within a defined period of time

Development boundary

an identified settlement boundary in the Angus Local Development Plan 2016

Financial & Business services

a defined sector used by the Scottish Assessor which includes banks & building societies and property services

Goed Code

a code allocated by the Scottish Assessor to identify types of businesses

Leisure

a defined sector used by the Scottish Assessor which includes public houses, hotels & guest houses, cafes, restaurants & takeaways, and sports & leisure

National Planning Framework 4 (NPF4)

a long-term plan looking to 2045, that guides spatial development, sets out national planning policies, designates national development and highlights regional spatial priorities. Since its adoption of 13th February 2023, it now forms part of the development plan, and influences planning decisions across Scotland

Non-retail clusters

a term set out in National Planning Framework 4 (NPF4) which refers to concentrations of businesses which may have a negative impact on the wellbeing of residents. These include hot food takeaways, betting shops and payday loan shops

Other uses

a defined sector used by the Scottish Assessor which includes offices, government buildings, information & advice services

Retail services

a defined sector used by the Scottish Assessor which includes hairdressers, nail & beauty salons, post offices, shoe & clothing repairs

Scottish Assessors Association Non-Domestic Valuation Roll

information sourced from the Scottish Assessor which provides details of the size, location and the type businesses operating

Sector

A classification provided by the Scottish Assessor which identifies a set of businesses, characterised by GOAD code, which are grouped into similar types of businesses

Town Centre

as defined by the Angus Local Development Plan 2016, which shows the area where the high levels of activity are expected to occur

Town Centre Survey

a survey undertaken within the defined town centre boundary, as set out in the Angus Local Development Plan 2016, to monitor activity within this area

Use Class

use is categorised in accordance with The Town and Country Planning (Use Classes) (Scotland) Order 1997

Vacant retail

unoccupied retail units

Vacant other

unoccupied units which are not considered retail units