Fife Council

Fife Retail Capacity Study 2021

December 2021

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1 Introduction and catchment areas

1.1 Scope

1.1.1 The Fife Retail Capacity Study 2021 is the latest in the series of annual retail capacity studies. These follow a similar format, with updates to the retail capacity forecasts every year and updates on retail market conditions every second year, although the 2020 Study also included a review of the retail market conditions by Ryden LLP in addition to the analysis of retail capacity.

1.1.2 The main purposes are to contribute updated information to interpret the *FIFEplan Local Development Plan* (adopted September 2017) and to assist development management on issues relating to planning applications for retail development.

1.2 List of updates

1.2.1 The Fife Retail Capacity Study 2021 contains the following updates:

- Retail capacity forecasts for 2021-26, 2026-31 and combined for 2021-31 for convenience and comparison expenditure
- All values in constant 2020 prices
- Projected population for the updated periods, based on the National Records Scotland (NRS) 2020 mid-year estimates and the 2018 based projections
- Retail expenditure forecasts to match the updated periods, commissioned from Precisely (formerly Pitney Bowes)
- Updated information on visitor retail expenditure in Fife
- Updated retail floorspace data from Experian Goad for 2021
- Other changes in the retail floorspace, including new completions and closures not covered by Experian
- Updated average company turnover ratios based on the 2021 Retail Rankings
- Updated list of major retail planning consents and commitments for 2021

1.2.2 It is not considered that there is any need to adjust the trip-based shopping patterns from the NEMS surveys in 2016 for the 2021 Capacity Study. However, the proportions of online retail spending are now higher.

1.2.3 In addition, the following information is included:

- Summary of the planning policy framework on town centres and retailing covering Fife;
- Appraisal of the latest national retail trends, plus retail market demand in Fife;
- Relating to the above, commentary on the effects of the pandemic on the retail sector
- Broad overview of the general quality of the retail offer in the main towns in terms of performance indicators;
- Interpretation of the findings

1.3 Retail catchment areas and population projections

1.3.1 The three retail catchment areas in Fife, as defined in the 2016 Study, are illustrated on Map 1.1 (West Fife, Mid Fife and East Fife).

1.3.2 The current and projected populations for Fife and the three retail catchment areas is shown in Table 1.1. In the 2021 Study, the catchment area populations are now based on the NRS 2020 mid-year populations for the electoral wards and data zones comprising each area. The projections to 2031 are based on the 2018 based NRS population projections for Fife, which are still the latest published. The projections for each of the three catchment areas are controlled to the total for Fife- see Appendix 1.

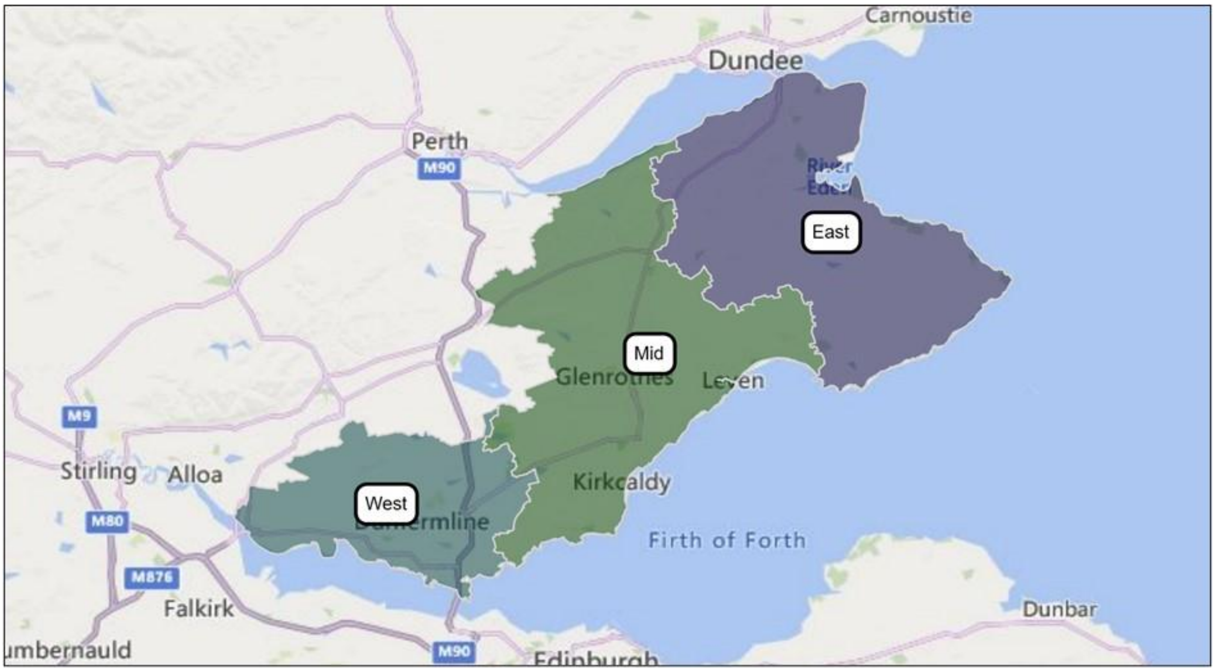
1.3.3 There is a projected minor decrease in the Council area population of -1,198 from 2021 to 2031 (-0.3%), with a forecast population of 370,658 for Fife by 2031.

Table 1.1
Fife retail catchment area population projections for the Fife Retail Capacity Study 2021

Retail catchment area	Census 2011	Mid-year 2020	2021	2026	2031
West Fife	123,608	129,402	128,615	128,567	128,201
Mid Fife	181,860	182,936	181,824	181,756	181,238
East Fife	59,730	61,792	61,416	61,393	61,219
Total Fife	**365,198**	**374,130**	**371,856**	**371,717**	**370,658**

Note
The 2011 data is taken directly from the 2011 Census, Scotland, based on postcode sector population data for each catchment.
The 2020 Mid-year data is from National Records Scotland (NRS) online based on electoral wards and data zones comprising each catchment.
Data for 2021, 2026 & 2031 derives from the NRS 2018-based population projections for the Fife Council area, apportioned to the three catchment areas from the 2020 Mid-year data. See Appendix 1

Map 1.1 Fife Retail Catchment Areas 2021



See Appendix 1 for details of the composition of the three areas (wards and data zones)

2 Planning policy framework

2.1 Introduction

2.1.1 This section provides a summary of the planning policy framework in Fife, as it relates to town centres and retailing.

2.2 Scottish Planning Policy

2.2.1 The SPP supports the promotion of town centres and reflects the importance of these as a key element of the economic and social fabric of Scotland. It states that planning should support the role of town centres to thrive and meet the needs of their residents, businesses, and visitors. It embeds the *town centre first* principle, and that planning for town centres should be flexible and proactive, enabling a wide range of uses which bring people into town centres. The planning system is directed to:

• apply a town centre first policy when planning for uses which attract significant numbers of people, including retail and commercial leisure, offices, community and cultural facilities;

• encourage a mix of uses in town centres to support their vibrancy, vitality and viability throughout the day and into the evening;

• ensure that development plans, decision-making and monitoring support successful town centres; and

• consider opportunities for promoting residential use within town centres where this fits with local need and demand.

2.2.2 Development Plans should identify a network of centres and explain how they can complement each other. Plans should also identify commercial centres which have a more specific focus on retailing and/or leisure uses.

2.2.3 Local planning authorities, working with community planning partners, businesses and community groups as appropriate, should prepare town centre health checks to assess town centres' strengths, vitality and viability, weaknesses and resilience to inform development plans and decisions on planning applications. A list of health check indicators is contained in Appendix A of the SPP.

2.2.4 Spatial elements of town centre strategies should be included in the development plan or supplementary guidance. Plans should address any significant changes in the roles and functions of centres over time, where change is supported by the results of a health check. Plans should assess how centres can accommodate development and identify opportunities.

2.2.5 Where a town centre strategy indicates that further provision of certain activities would undermine the character and amenity of centres or the well-being of communities, plans should include policies to prevent such over-provision and clustering.

2.2.6 Under the 'town centres first' policy development plans should adopt the sequential approach to preferred locations for uses which generate significant footfall, including retailing and other uses, in the following order of preference:

- Town centres
- Edge of town centres
- Other commercial centres
- Out of centre locations that are readily accessible by a choice of transport.

2.2.7 All parties are advised to be realistic and flexible in applying the sequential test. New development in a town centre should contribute to diversity and be of a scale appropriate to that centre. A retail impact analysis is required for retail and leisure developments over 2,500 sq m gross which are contrary to the development plan. For smaller developments which affect vitality and viability, an impact analysis may also be required.

2.2.8 Out of centre locations should only be considered where the town centre/ edge of centre and commercial centre options are unavailable or do not exist, together with meeting other criteria specified in the SPP.

2.2.9 The 2014 SPP was amended in December 2020 to include changes sought by the Scottish Ministers about housing land supply and sustainable development. These amendments were quashed by the Court of

Session in July 2021. The SPP will remain in place until the 4th National Planning Framework is approved by the Scottish Parliament and adopted by the Scottish Ministers.

2.3 Draft National Planning Framework 4

2.3.1 In November 2021, the Scottish Government published the Draft National Planning Framework (NPF4) which is now open for consultation. Representations are invited until 30th March 2022. It is a lengthy document and Professor Leigh Sparks has posted a helpful summary which is partly reproduced in the following paragraphs.

2.3.2 It is presented in four parts: *the strategy*, *national developments*, the *policy handbook* and *delivery.* The focus is on 'places' and the policies come under the headings of places that are sustainable, liveable, productive and distinctive. These deliver on principles of:

- compact growth
- local living
- balanced development
- conserving and recycling assets
- urban and rural synergy
- just transition

2.3.3 They provide a focus for a different development path for the future, aided by the strong presence throughout of the Place Principle, 20-minute neighbourhoods and to a lesser extent, community wealth building. People and place are positioned before travel and the aim is to reduce unsustainable travel and the use/reliance on the private car.

2.3.4 Retail policy focusses on town centres, continuing the existing principle of the sequential test and the associated use of retail impact assessments, using sense in their application against the 20-minute neighbourhood concept.

2.3.5 Policy 26 on 'town centre first' assessment outlines the sequential approach, then seeks to ensure proposals are appropriate in scale, the impacts are assessed and importantly, 'the proposal will not adversely impact on action to tackle climate change by generating significant levels of additional journeys with the reliance on the private car'.

2.4 Reforms to the planning system

2.4.1 The Planning (Scotland) Act was passed in July 2019. It removes the requirement to prepare strategic development plans. Instead, one or more local planning authorities must jointly prepare *regional spatial strategies.* Amendments to what must be included in local development plans were included.

2.5 SESplan 2013

2.5.1 SESplan Strategic Development Plan sets out a vision to 2032 for the development of the south-east Scotland region. The second Proposed Strategic Development Plan (SESplan 2) was rejected by the Scottish Ministers in 2019, leaving the existing Plan in force for now. The SESplan will remain a legal entity until NPF4 comes into force.

2.5.2 The area covers the West Fife retail catchment area and most of the Mid Fife catchment, excluding a small part to the north (see TAYplan).

2.5.3 Policy 3 (*Town Centres and Retail*) states that Local Development Plans will:

- Identify town centres and commercial centres clearly defining their roles;
- Support and promote the defined network of centres; and
- Promote a sequential approach to the selection of locations for retail and commercial leisure proposals.

2.5.4 The SESplan requires local development plans to support a wide mix of uses in town centres. This includes high footfall generating uses, including retailing. Strategic Centres include Dunfermline, Glenrothes, Kirkcaldy and Livingston.

2.6 TAYplan

2.6.1 The TAYplan was approved in October 2017. In Fife, the TAYplan covers the East Fife retail catchment area and a small part of the Mid Fife retail catchment area including Falkland and Newburgh. Like the SESplan, it remains unchanged for now. The TAYplan will remain a legal entity until NPF4 comes into force.

2.6.2 There is a hierarchy of principal settlements in the TAYplan. Tier 1 includes Perth and Dundee, which are anticipated to accommodate most new development. Tier 2 settlements will take smaller shares of development but have the potential to make significant contributions to the regional economy. Tier 3 settlements will take a small share of development and make a modest contribution to the regional economy. Cupar and St Andrews are defined as *larger town centres.* Anstruther and Newburgh are *defined as smaller town centres*.

2.6.3 Policy 2 in the TAYplan aims to 'Shape Better Quality Places'. Of principal relevance to our study is *Policy 5 -Town Centres First,* which is to protect and enhance the vitality, viability and vibrancy of city/ town centres.

2.7 FIFEplan

2.7.1 The Fife Local Development Plan (FIFEplan) was adopted in September 2017 and it replaced all previous local plans in Fife.

2.7.2 *Policy 6* in the FIFEplan is the Town Centres First policy. It re-iterates the policy requirements in the SPP on promoting town centres and establishing a network of centres.

2.7.3 In Fife, application of the sequential test must relate to the retail market area level, rather than at the town level, as illustrated in Figure 6.1 of the FIFEplan.

2.7.4 Figure 6.2 sets out the framework for the roles of town centres, local centres and commercial centres in Fife.

2.7.5 Figure 6.3 in the FIFEplan shows the size thresholds for proposed developments where the sequential test would apply.

2.7.6 Town centre frameworks have been developed for the town centres and out-of-centre commercial centres and these must be referenced alongside the policies. Figure 6.4A illustrates existing uses in the commercial centres and Figure 6.4B indicates acceptable uses in the commercial centres. Figure 6.5 indicates acceptable uses in the town centres. Together, these Figures in the FIFEplan identify the main towns and commercial centres in Fife:

Town Centres

- Dunfermline
- Kirkcaldy
- Glenrothes
- St Andrews
- Cupar
- Cowdenbeath
- Leven
- Lochgelly
- Dalgety Bay Town Centre

Commercial Centres

- Fife Leisure Park
- Halbeath Retail Park
- Fife Central Retail Park
- Saltire Retail Park

2.7.7 The FIFEplan Action Programme-Edition 3 was published in July 2020. It identifies what is required to implement the FIFEplan and deliver its proposals.

3 National trends in retailing

3.1 Introduction

3.1.1 This section considers some of the national trends driving activity in the UK and the Scottish retail and leisure sectors. It provides a high-level context for local market trends and projections for Fife, shown later in the report.

3.2 Market trends

3.2.1 Several key trends were driving the retail sector pre-pandemic, as shown below.

3.2.2 **Concentration into dominant centres-** as consumers travel for an increasing range of goods and services. Retailers, leisure operators and service providers have been investing in those dominant centres, and disinvesting from many medium and small centres, leading to many store closures.

3.2.3 **Online shopping-** has exacerbated the costs and market concentration challenges facing some retailers. Online shopping for groceries is estimated to account for about 17% of sales, while for non-food shopping the proportion is estimated to be around 37% (source: *Precisely*) although it could be higher. It is forecast to increase. The pandemic has accelerated the increase in online shopping. For independent retailers in small towns, the development of online sales is becoming essential for survival. Meanwhile, much of the service sector, such as banks, estate agents and travel agents had already rationalised their services to be orientated online, which means that they are unlikely to reappear in small towns in the future.

3.2.4 **Diversification away from shopping-** in part as a response to the above two challenges had become widespread across the market. Landlords and developers seeking alternative sources of revenue and footfall were introducing leisure (cafes, bars, restaurants, cinemas). Diversification is also evident within superstores. Most town centre operators are too small to offer significant diversification, although examples include cafes within shops and retail art galleries.

3.2.5 **Lifestyle changes-** before the pandemic, people were switching towards shopping for groceries and some comparison shopping more locally than before. Small store formats were popular, such as Tesco Express, Sainsbury's Local and, particularly in small towns, Co-op. Value retailing in suburban locations such as Lidl, Aldi and B&M has become become especially important and continues to be so with limited household budgets.

3.2.6 The pandemic has accelerated these trends. Prime retail continues to concentrate into very few cities and destination malls and retail parks. The relentless rise of online shopping, accelerated by the pandemic lockdowns, has further transformed the retail landscape. Online shopping has shifted a large part of the market from physical shopping to technology and logistics.

3.2.7 Traditional town centres, including larger centres such as county towns, have lost market share, particularly as larger multiple retailers require fewer stores to service their customers' needs. The enforced move to working from home has further embedding local shopping for convenience and general needs.

3.2.8 Particularly notable in the marketplace is the loss of half of Scotland's department stores since 2015 and the loss of fashion stores including the Arcadia group (Burtons, Dorothy Perkins et al) and Gap which is moving entirely online in the UK. Casual dining over-expanded during the last market cycle and is now seeing closures (Frankie & Benny's for example). There is also market concern over the capacity of smaller chains and independents who have survived the pandemic to repay debt1 and resume previous trading levels.

[1] In his regular sector report, Bill Grimsey suggests that at least one-third of small high street businesses could default on loans which have climbed from £500m pre-pandemic to £2.3bn.

3.2.9 In very local markets value/ discount retailers, grocery/ convenience stores and food & beverage chains (typically Drive-thru now) are evident in Fife and continue to invest - see commentary below. Likewise, personal services such as health & beauty and private medical operators including dentists, vets etc continue to trade well from physical premises. These are services which effectively cannot be bought online.

3.2.10 The Centre for Retail Research[2] summarises the current market challenges facing physical retailing as high costs (rents, rates and labour), low profitability (costs again and heavy price competition), online growth, lack of planning and preparation, and the lockdowns.

3.2.11 Market adjustment will take a number of years, as vacancies rise (JLL estimates a doubling of vacant units from pre-pandemic to 2026) and values fall and new formats or alternative uses are introduced. Interventions in town centres to remove retail space and provide other commercial, residential or amenity space are becoming more commonplace. Even the apex of the retail market, Edinburgh's Princes Street, is seeing dramatic change both from the loss of failed retailers and the opening of the new St James Quarter.

3.2.12 Town centres which offer essential local uses and / or high quality shopping and associated visitor experience are likely to fare best. Others are likely to require ongoing restructuring into the medium term.

3.3 Forecast retail expenditure trends

3.3.1 There is a large difference between the forecast growth in convenience retail expenditure and comparison retail expenditure over the next ten years. The forecasts for Fife in this report are based on UK trends, adapted by Precisely (Oxford Economics) in their forecasts to allow for the socio economic characteristics of the Council area.

3.3.2 As shown in Table 5.1 later in the report, the forecast growth in expenditure per capita on convenience goods per annum by Precisely is negative for each of the three Fife catchment areas from 2021-26 at around -1% per annum. It then becomes slightly positive at around +0.6% per annum for most of Fife, from 2026-31. Therefore, the case for more convenience floorspace is mostly about improved choice.

3.3.3 Expenditure per capita on comparison goods is forecast to rise by less than 2% per annum in Fife from 2021-26, which is low by historic standards. The forecast remains low at just over 2% per annum from 2026-31. A substantial part of the forecast increase in comparison expenditure will be online shopping, leaving a reduced amount to service shop floorspace.

3.4 Scottish trends

3.4.1 Scottish Government figures show that the economy grew by 4.7% during the second quarter of 2021. Compared to the same quarter of 2020 GDP in Scotland grew by 21.7%. The services sector, which includes retailing and leisure among others, grew by 5.2% in the second quarter of 2021.

3.4.2 Scottish Government's Retail Sales Index is currently on hold, results are available in the Monthly GDP Estimates.

3.4.3 The August 2021 publication estimated onshore GDP to have grown by 0.1% in August 2021, while in the three months to August GDP is estimated to have grown by 2.6% compared with the previous three month figure. Output in the services sector grew by 0.2% in August but remains 0.7% below the pre-Covid level in February 2020. Output from the retail sub-sector is estimated to have fallen by 1.5% during August. An index from the wholesale, retail and motor trades sector sub-sector from August 2021's publication is shown in Figure 3.1 overleaf.

3.4.4 KPMG and the Scottish Retail Consortium (SRC) *Scottish Retail Monitor* reported that in October 2021, total sales in Scotland increased by 2% year-on-year,

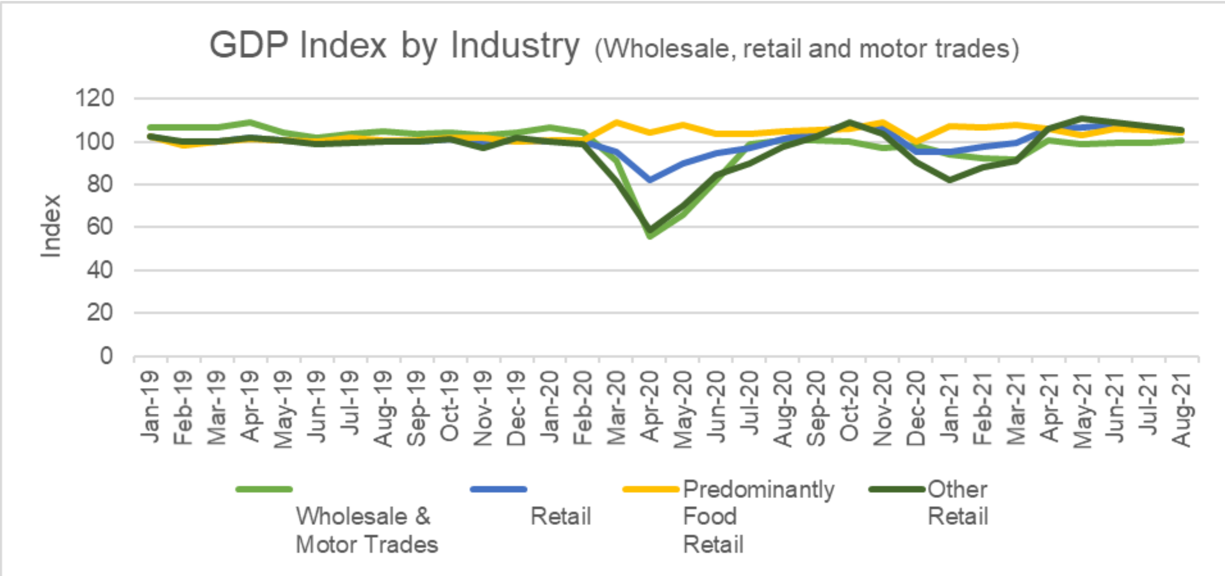
[2] Retail at Bay (2021 update)

however they are still down on pre-pandemic levels. On a two-year basis retail sales performed well below pre-pandemic levels where sales were down 11.3% on October 2019 levels.

3.4.5 The latest figures show total food sales decreased 1.3% versus October 2020, when they had increased by 4.4%; total non-food sales increased by 4.8% in October, compared with last year, when they had decreased by 19.3%. Adjusted for the estimated effect of online sales, total non-food sales increased by 0.4% in October versus the same month last year, when they had decreased by 6.2%.

3.4.6 Clothing and footwear performed well, while early Christmas-related purchases were seen. However, furniture sales remained weak, and grocery sales cooled.

Figure 3.1



4 Fife retail market overview

4.1 Introduction

4.1.1 This section of the report contains a review of the retail market in Fife. It includes assessment of retailing in the main town centres: Dunfermline, Cowdenbeath, Kirkcaldy, Glenrothes, Leven, St Andrews and Cupar. The market assessments also include the leisure-related, non-retail service sector, who are important occupiers of town centres.

4.1.2 Appraisal is also included of the retail parks at Carnegie Drive and Halbeath in Dunfermline, Fife Central Retail Park in Kirkcaldy and Saltire Retail Park in Glenrothes, plus reference to Fife Leisure Park.

4.1.3 The convenience and comparison floorspace in the main towns is shown in the tables in sections 5 and 7. The retail park occupiers are listed in Appendix 4.

4.2 Fife overview

4.2.1 Fife has three large town centres (Dunfermline, Kirkcaldy and Glenrothes) and four commercial centres. It has the largest online retail offer in Scotland at the Amazon Regional Distribution Centre. However, it is exposed to the channeling of most investment into major cities such as Edinburgh, as mentioned in the previous section.

4.2.2 Fife's town centres face a continuing competitive challenge to retain their retail and service mix and maintain their market positions, especially in the face of online retailing and the disruptive effects of the Covid pandemic.

4.2.3 On convenience retail development, there has been little change since last year in Fife. The main addition being development of the new Lidl store in Kirkcaldy at the on the former Stagecoach site. Their original unit has recently re- opened as a Food Warehouse store Consents for a Lidl store in Rosyth, and M&S Food plus Lidl at Halbeath remain undeveloped- see Table 5.11 and commentary in sub section 5.8. The market is sluggish and reflects the good provision of supermarkets in Fife; probably verging on saturation. In line with national trends, there is no evidence of market interest in developing more traditional mid-size supermarkets and superstores.

4.2.4 On comparison retailing, development of planning consents has been slow, accompanied by scheme revisions. The main highlight is progress on developing units at South Road, Cupar. The mixed goods retailer, B&M is still expanding in Fife.

4.3 Number of town centre shops

4.3.1 The number of shops in the main town centres in Fife has declined since 2018, except in Cupar, where there has been an increase, as shown in Table 4.1. The number of shops in Glenrothes has not changed, indicating stability. The greatest decline has been in Kirkcaldy, which has not performed well, and in St Andrews. In the case of the latter, the effects of the pandemic will have been felt in terms of reduced visitor spending, for example.

4.4 Vacancy rates

4.4.1 The Scottish overall retail vacancy rate reached a six-year high of 16.4% in October 2021, compared to 14.4% at the same time last year. In the high streets, vacancy rates increased to 15%, shopping centres decreased to 21.4% and retail park vacancies decreased to 13.4%. This information derives from research by the Scottish Retail Consortium and The Local Data Company. It reflects the impact on retail businesses of measures taken against the Covid pandemic.

4.4.2 The vacancy rates in the main town centres in Fife are shown in Table 4.2. Vacancy rates have risen markedly in Kirkcaldy and St Andrews since 2018. With 100 vacant units, the situation in Kirkcaldy town centre is not good at all. There have also been significant increases in vacant units in Dunfermline and Glenrothes too. Vacancies have decreased in Cowdenbeath and Cupar.

Table 4.1
Numbers of occupied convenience and comparison shops in the main town centres in Fife

Town Centre	2018	2019	2021	% change 2018-21
Dunfernline	142	138	125	-12%
Cowdenbeath	47	45	43	-9%
Kirkcaldy	137	129	114	-17%
Glenrothes	78	79	78	0%
Leven	56	58	55	-2%
Cupar	61	63	65	7%
St Andrews	114	107	94	-18%

Note: source -Goad surveys 2018, 2019 and 2021. No data for 2020

Table 4.2
Vacant units in the main town centres in Fife: 2018 and 2021

	2018			2021		
	Vacant units	Total units	Vacancy rate %	Vacant units	Total units	Vacancy rate %
Dunfermline	60	377	15.9%	72	375	19.2%
Cowdenbeath	28	136	20.6%	26	135	19.3%
Kirkcaldy	73	375	19.5%	100	373	26.8%
Glenrothes	33	193	17.1%	41	195	21.0%
Leven	29	162	17.9%	28	154	18.2%
Cupar	28	199	14.1%	23	191	12.0%
St Andrews	7	236	3.0%	24	235	10.2%

Scottish town centre average (High Streets) October 2021 15%
Overall retail unit vacancy rate October 2021 16.4%
Sources: Scottish Retail Consortium and The Local Data Company

Note: vacancy rate= vacant units/ (retail and non-retail service units & vacant units). Excludes nulls such as entrance halls and car parks.
Sources: Goad 2018 and 2021 surveys- (Goad definition of town centres)

4.5 Multiple retailer representation

4.5.1 Table 4.3 shows the multiple retailer representation among convenience and comparison shops in the main towns in Fife in 2021.

4.5.2 There has been a marked increase in the proportion of multiples in Cowdenbeath since 2018, but decreases in Kirkcaldy, Dunfermline and Leven, with little change elsewhere.

Table 4.3
Multiple retailer representation in the main town centres in Fife - 2021

	*Multiple retailers	Convenience & comparison shops	% multiple retailers in 2021	*% multiple retailers in 2018*
Dunfernline	57	125	46%	*49%*
Cowdenbeath	17	43	40%	*30%*
Kirkcaldy	53	114	46%	*51%*
Glenrothes	49	78	63%	*62%*
Leven	21	55	38%	*41%*
Cupar	20	65	31%	*30%*
St Andrews	34	94	36%	*37%*

Note: source -Goad surveys 2018
* refers to multiple retailers only, excluding multiple non-retail services. A multiple is defined as a retailer with 9 or more outlets (Experian).
There are a few local chains with less than 9 outlets, and these are excluded. Charity shops have not been classified as muliples here.

4.6 Retail rents

4.6.1 Table 4.4 shows the achieved average Zone A retail rents in the main town centres in Fife, for 2021. The highest rents are in St Andrews by a considerable measure, which reflects relatively strong local demand because of the nature of the town and the quality of offer. Rising vacancy levels are a warning that demand may become more fragile.

4.6.2 Rents in Dunfermline reflect the variety of town centre premises and the variability of locations and changes in the market. There has been a downward pressure on rents in Kirkcaldy which is consistent with the over-supply of units, many of which are probably unsuitable to meet modern requirements. Rents are also low in Glenrothes. In both towns, the market rent position is consistent with the high level of vacancies. In Cowdenbeath, asking rents on the High Street have held up in recent years, as they have in Cupar and Leven.

Table 4.4
Zone A retail rents in the main town centres in Fife, 2021

	2018 £ per sq ft	2020 £ per sq ft	2021 £ per sq ft
Dunfernline	up to 60	12-35	12-43
Cowdenbeath	5-10	6-11	5-14
Kirkcaldy	16 to 34	11-26	5-18
Glenrothes	10-22	*18	10-11
Leven	7-24	7-12	7-12
Cupar	11-20	around 11	10-16
St Andrews	35 to 60	32-44	25-56

Source: Ryden
Mostly records of achieved rents and asking rents. There are ranges, and the highest figures are for the best premises.
*Only one record found

4.7 Retailer requirements 2021

4.7.1 Due to the current turmoil in the retail market, it is not possible to comment comprehensively on current retailer requirements. Many retailers are not reporting their requirements, although they may have specific site requirements which they are progressing. This is evident from the convenience and leisure lettings in modern units on retail parks for example.

4.7.2 Known requirements at this time include:

- Amber Taverns have a requirement for Dunfermline. Their requirement for Kirkcaldy is fulfilled with the conversion of the former Dorothy Perkins / Burton unit.
- M & S Simply Food for Dunfermline
- Lidl for St Andrews, Kirkcaldy, Dunfermline north and Dunfermline south
- Poundstretcher for Glenrothes and Kirkcaldy

4.7.3 Non-specific retailer requirements covering the market rather than individual towns include: Savers, Superdrug, Wren Kitchens, Burger King, Costa Coffee, Fraser Hart, Oliver Bonas, Sainsbury's Local, The Works, Pets at Home, Aldi, Lidl, Pizza Hut, British Heart Foundation, Specsavers and Subway.

4.8 West Fife- market activity and demand

4.8.1 **Dunfermline-** there has been some market activity in the Kingsgate Shopping Centre. Debenhams has closed, which included a *Costa Coffee*. Elsewhere in the centre *Dorothy Perkins, Burton* and *Top Shop* have also closed. However new stores were opened by *B & M and Bubble Treats* (in the former Thorntons shop). The former *DW* sports shop is currently being used as a vaccination centre. There has been little activity on Dunfermline High Street, although the *Andrew Thompson* electrical / furniture store closed.

4.8.2 Dunfermline town centre continues to offer a good range of independent outlets.

Recent store openings include On the New Row, *Mr Potato Head* opened in the former Serpentus Exotics unit and *Treat Time* dessert shop opened in the former Maggies Farm unit. The *Vivid Circle* hairdressing salon opened on Cross Wynd. The *Wee Shop* newsagent is new to Douglas Street. *Little Thailand Streetfood* takeaway is opening soon on Bruce Street.

4.8.3 The leisure sector has been active in the town centre. New restaurants and cafes include: *269 Vegan* in the former Juniper Wine Café and The *Haberdashery Bar* opened in the former Watering Hole pub on New Row. There are proposals for a 24-bedroom hotel above the La Menta bistro on the High Street. However, the Kinema buffet restaurant did not re-open after lockdown ended.

4.8.4 Development of The Linen Quarter at the former Pilmuir Works is under way, bringing premium new-build residential to the town centre. In addition, there have been several applications for change-of-use of upper floors to residential on the High Street and surrounds.

4.8.5 **Carnegie Retail Park**- no activity has taken place recently and one unit remains available.

4.8.6 **Halbeath Retail Park-** the Harveys furniture/Bensons for Beds unit has closed and is vacant. There is consent for an extension to accommodate *Lidl, M&S Simply Food* and other units for bulky goods, all totaling 12,445 sq m gross– see Tables 5.11 and 7.11.

4.8.7 Opposite Halbeath Retail Park on Halbeath's Main Street, development is nearing completion of Pittsburgh Retail Park, which comprises three retail units, a café/ restaurant and two Drive-thrus. *Burger King* opened in October 2021 and the opening of *Costa Coffee, Greggs* and *Indigo Sun* is imminent. Two units are available.

4.8.8 **Fife Leisure Park -** the former Chiquito restaurant has been converted into a Drive-thru Tim Hortons. The former Bella Italia and the Eastern Buffet restaurants remain vacant.

4.8.9 **Cowdenbeath-** on High Street, *PhotoJenniK* opened at no 84-86 High Street and Smooth Laser Hair Removal opened at no 197. The former Greggs had a change of use application for conversion into a restaurant, as did the former Coral betting shop. A local property developer purchased the former Crown Hotel and plans to convert it into a restaurant with residential above.

4.9 Mid Fife- market activity and demand

4.9.1 **Kirkcaldy** town centre continues to suffer the effects of three large historic store closures. The Tesco supermarket closed in the Postings Shopping Centre in 2015. On the High Street at the Mercat Shopping Centre, the BHS store closed in 2016 and Marks & Spencer store closed in 2019. These large units all remain vacant although the former M&S is currently being used as a vaccination centre.

4.9.2 The former BHS was purchased by the new owners of the Mercat shopping centre and there are proposals to use part of the store as job centre. More recent closures include Burtons, Dorothy Perkins, Clarks and WH Smith. Amber Taverns is currently converting the Burtons/ Dorothy Perkings store into a bar to be named Montagues.

4.9.3 The Mercat shopping centre was sold to Belgate (Kirkcaldy) Ltd (part of Glasgow-based Gatehouse Property Management) in Spring 2021. Since then, several local stores have opened: *Busted Clothes* shop, *Mobile Xtras, Blend Juice Bar, WR&P home décor, CCS Flora Design, The Beauty Boutique, Kirkcaldy Art Club Shop,* and *The Tattie Shed* (who relocated from Whytescauseway).

4.9.4 On the High Street, *Syan Fashions* opened in the former Clarks shoe shop. The centre's former owner, Lasalle Investment Management, planned a cinema, leisure and food and drink/public house use on the site of the former swimming pool, the application was approved (with conditions) in March 2020.

4.9.5 The 15:17 concession store in the former Debenhams on the High Street closed in October 2021, only weeks after opening in September. The unit was purchased by Evergold, the same firm that purchased The Postings and the landlord of this unit opened a department store here in November 2021.

4.9.6 Market activity in Kirkcaldy town centre has also mainly come from independent and specialist retailers. There have been several new store openings on the High Street with *My Home Tools* at no 55; *Puddledub Butcher* relocating to a larger unit at no 71. *Roots and Seeds Café Bistro* opened at no 73 in the former La Speranza. *Freshways Convenience Store* opened at no 82/84. *Lloyds Pharmac*y relocated into the former Santander unit at no 133*. Lang Toun Cycles*, a community bike shop, opened at no 245 and *Home of Hopcroft* opened at no 339. *Grain & Sustain* opened on Tolbooth Street in October 2021.

4.9.7 At the east end of the High Street work has begun on a 39-flat residential development on the gap site of the former Co-op, which will include commercial units. There has been further activity in the Merchants Quarter, which is a hub for independent businesses where *Merchants House coffee shop* and *Phil+Sophy* homewares both opened.

4.9.8 The 80,620 sq.ft. Postings Shopping Centre which was sold by Columbia Threadneedle at the start of 2019 to Evergold Property has now closed. The final two tenants *Farmfoods* and *Lloyds Pharmacy* vacated the centre in June 2021. Plans for redevelopment are to be announced. Farmfoods is leaving Kirkcaldy while Lloyds Pharmacy relocated to the High Street.

4.9.9 The waterfront is attracting activity. The Lidl supermarket relocated to a new-build store at the west end of the Esplanade adjacent to Morrisons supermarket. The former Lidl store, also on the Esplanade, is currently being converted to an Iceland brand, *Food Warehouse.* The Esplanade is undergoing transformation works with a new road layout, public realm and lighting. There are early proposals for a hotel and restaurant on the former Stagecoach depot land next to Morrisons.

4.9.10 **Fife Central Retail Park-** Oak Furnitureland closed and is vacant, and the former DW Sports shop remains vacant. The One Below discount store closed and Dreams bed specialist opened in its place. The Frankie and Benny's restaurant closed during 2020 and is currently being converted into a drive thru Starbucks, while the Park's KFC outlet is being refurbished.

4.9.11 **Glenrothes-** the Kingdom Shopping Centre is the town's principal retail location. During 2021, *VPZ Vape Shop* and *The Party Empire* opened in the Kingdom Centre and a café is planned for a former shop on Lyon Way. Farmfoods relocated from the centre to the Henge Retail Park. Bodycare and Value Clothing closed, and Argos did not re-open following lockdown. There is only recorded rent for a recent deal and asking rents in the centre are £10 - £11 per sq.ft.

4.9.12 A masterplan for Glenrothes town centre was approved in March 2021, with a vision for central Glenrothes to become a vibrant and sustainable place by improving the night-time economy, developing green public spaces and identify investment opportunities, including residential development.

4.9.13 Henge Retail Park is a convenience-led scheme developed by Easy Living Developments' on the site of the CISWO club on North Street in Glenrothes. The 33,200 sq.ft. Park opened at the end of 2018 and is anchored by a stand-alone Marks & Spencer foodhall; other tenants are Food Warehouse (by Iceland), Indigo Sun tanning salon, and most recently Farmfoods opened a store in February 2021. Atmore Properties plc sold the retail park to Columbia Threadneedle Investments in May 2021 for £7 million. Two Drive- thru restaurants are proposed neighbouring this retail park.

4.9.14 B & M plan to relocate to the former Buzz Bingo premises on Flemington Road, which is next door to their current store.

4.9.15 **Saltire Retail Park-** occupiers here are Matalan, Poundstretcher/ Pet Hut, American Golf, Homebase, Carpetright, and Xtreme Trampoline, while Unit 5, the former Bensons for Beds, remains vacant.

4.9.16 **Leven-** there has been little retail activity. Koffee House café opened at 16 High Street and the former WH Smith store is to be converted by third sector BRAG Enterprises into a community hub. Proposals include a cafe, shop, mini golf and escape room.

4.9.17 A planning application for four retail units (Class 1) east of Durie Street in Leven and adjacent to the Lidl foodstore was approved in 2020.

4.9.18 **Riverside Retail Park** is located on the edge of Leven town centre, close to Sainsbury's and Home Bargains. A Starbucks

Drive- thru coffee shop opened in August 2021. The former Argos unit is available for lease.

4.10 East Fife- market activity and demand

4.10.1 In East Fife, a high proportion of non-food shopping is done in Dundee. The University town of St Andrews is the main shopping centre.

4.10.2 **St Andrews-** new stores were opened on Market Street by Edens gift shop and *Voyager Life* and *Blendworks* (in the former Burns sweet shop). There was activity on Bell Street with *Regatta, Sheila Fleet jewellery, Openview Gallery* (in the former Mac store) and *Sprinkles Coffee Shop* (in the former Ladybirds Florist unit) all opening stores. *Top A Nails* St Andrews opened in the former Junor Gallery on South Street.

4.10.3 New food and beverage openings include Haar Restaurant on Golf Place, on Alexandra Place Dram & Haggis opened in the former Haarbour restaurant which had closed in the summer, Hatch opened on South Street.

4.10.4 **Cupar-** new stores on Bonnygate include *Lux* (in the former barber shop), *Mint Brows, Bonny Blooms* of Cupar (in the former Country Fayre store), *Kukis Peri Peri Grill & Desserts* and *Pawws* dog grooming salon. On Crossgate, Lady Jane closed and VPZ relocated into this unit from Bonnygate.

4.10.5 Planning permission was granted to London & Scottish Developments in September 2020 for an £8 million development which will comprise seven retail units totaling 3,579 sq m, plus other small leisure units- see Table 7.11. Work commenced in February 2021. B&M has pre-let the largest unit plus a garden centre site. Pre-lets have also been agreed with Indigo Sun, Burger King, coffee chain Costa, and more recently Bayne's the Family Bakers and Nimbus Beds Only two units now remain available.

4.11 Overall

4.11.1 The retail market remains subdued with evidence that the pandemic is set to continue. There have been signs of encouraging market activity in Fife, but it is quite limited.

5 Convenience expenditure and turnover

5.1 Introduction

5.1.1 This section of the report assesses the convenience expenditure and turnover relationships for each the three retail catchment areas and for Fife, taking account of the convenience shopping patterns identified by 2016 household shopping interview survey.

5.1.2 The total turnover in each catchment area derives from the residents' expenditure potential, plus inflows, less outflows. The distribution of the turnover among the various centres and supermarkets is then controlled to the total deduced turnover for each catchment area from the shopping patterns.

5.2 Convenience goods-definition

5.2.1 Convenience goods include:

- *Food and non- alcoholic drinks*
- *Alcoholic drinks*
- *Tobacco*
- *Non-durable household goods and*
- *Newspapers and magazines.*

5.2.2 This definition is provided in the *Precisely* Retail Expenditure Guide 2021/22, based on ONS classifications.

5.3 Convenience expenditure potential

5.3.1 Table 5.1 shows the forecast convenience expenditure per capita data for each of the three retail catchment areas in Fife. It is based on data commissioned from Precisely for this study, which incorporates forecasts by *Oxford Economics*.

5.3.2 The forecast growth rates per annum for each catchment area from 2021-26 are minimal or negative as shown in the table, before deducting special forms of trading. The growth rates per annum pick up for 2026-31 but are still low. The expenditure per capita data is higher than in the 2020 Capacity Study.

5.3.3 Special forms of trading (SFT) include internet shopping, mail order and other forms of retailing which are not wholly dependent on retail floorspace. In fact, internet shopping comprises almost all SFT. For retail planning purposes, it is removed from the expenditure per capita data, so that the expenditure relates to conventional store floorspace, as shown in Table 5.1.

5.3.4 The proportion of SFT, or non-store sales, is forecast to increase up to 2031. It should be noted that the proportions of SFT shown in this table are mostly non-store sales and the proportions are low, but higher than in the 2020 Capacity Study. Not included are internet related SFT sales with home delivery or click and collect for example, because the goods mainly come off existing supermarket shelves and that proportion is much larger but excluded here. The national proportions are applied in Table 5.1, based on data from Precisely.

5.3.5 Forecasts of the total convenience expenditure potential of the residents of each catchment area are shown in Table 5.2. The forecast expenditure totals are slightly higher than those in the 2020 Capacity Study.

5.4 Convenience shopping patterns-market shares

5.4.1 In the 2016 NEMS household shopping interview survey, the respondents were asked where *they last visited for their main food shopping (Q1)*, and *the time before that (Q2)*. They were also asked where *they last visited for their top-up shopping (Q3)*. The findings were weighted and combined to provide estimates of all convenience shopping patterns relating to each of the catchment areas, as shown in Table 5.3.

5.4.2 Market shares refer to the proportions of expenditure by residents of a defined area which are spent in that area and in other areas. Table 5.3 shows the convenience market shares for each catchment area, based on the shopping patterns identified from the household survey.

Table 5.1
Fife convenience expenditure per capita per annum (in 2020 prices)

Catchment areas	2021 £	2026 £	2031 £
West Fife	2,445	2,337	2,410
Mid Fife	2,524	2,418	2,498
East Fife	2,385	2,239	2,279
**excluding special forms of trading*			
West Fife	*2,279*	*2,173*	*2,232*
Mid Fife	*2,352*	*2,249*	*2,313*
East Fife	*2,223*	*2,082*	*2,110*

Note - Source- *Precisely*

Original expenditure per capita data in the top three rows provided by Precisely in their GeoInsight report 2021 for this study is in 2020 prices.

		2021-26	2026-31
Growth rate per annum	West Fife	-0.90%	0.62%
	Mid Fife	-0.85%	0.65%
	East Fife	-1.26%	0.35%

*The proportion of convenience goods expenditure relating to Special Forms of Trading (SFT- mainly internet spend)- is small when store-based internet spending is removed, such as items picked off supermarket shelves by staff for delivery or click.and collect. Precisely publish their estimates of non-store based internet spending on convenience goods for the UK in their Retail Expenditure Guide 2021/22- Table 3.5

	2021	2026	2031
Deductions for SFT	-6.8%	-7.0%	-7.4%

Table 5.2
Fife residents' convenience expenditure potential (in 2020 prices)
Excluding SFT (special forms of trading)

Catchment areas	2021 £ million	*growth 2021-26 £ million*	2026 £ million	*growth 2026-31 £ million*	2031 £ million
West Fife	293.1	*-13.7*	279.4	*6.7*	286.1
Mid Fife	427.7	*-19.0*	408.7	*10.5*	419.2
East Fife	136.5	*-8.7*	127.8	*1.4*	129.2
Total Fife	857.3	*-41.3*	816.0	*18.5*	834.5

Note
From Tables 1.1 and 5.1. Figures are rounded.

Table 5.3
Fife Council area residents- all convenience shopping patterns (Q1-Q3 combined) 2016 survey

Catchment areas	**Origin** West Fife	Mid Fife	East Fife	Total Fife
Destination				
West Fife	92%	8%	0%	35%
Mid Fife	4%	87%	10%	46%
East Fife	0%	3%	73%	13%
Outside Fife	5%	2%	17%	6%
Total	100%	100%	100%	100%

Source: NEMS household shopping interview survey 2016 for Fife Council
The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mail order
Main food shopping (Q1&Q2) and top-up shopping (Q3) is weighted 80%:20% for the combination

5.4.3 In West Fife, 92% of convenience shopping is done locally, with small proportions undertaken in Mid Fife and in centres outside Fife. In Mid Fife, 87% of convenience shopping is done locally and 8% in West Fife, with small proportions elsewhere. In East Fife, 73% of convenience shopping is done locally and 17% outside Fife and 10% in Mid Fife.

5.4.4 For Fife, 94% of convenience expenditure is retained in the Council area, leaving only 6% leakage. Graphs showing the most visited stores for main food shopping by respondents to the survey are shown in Figure 5.1, reproduced from the Fife Retail Capacity Study 2016 for ease of reference.

5.5 Convenience expenditure and turnover by catchment area

5.5.1 The relationship between total expenditure and turnover in each retail catchment area is defined at the beginning of this section.

5.5.2 Appendix 2 shows the estimates of convenience expenditure inflows to each catchment area in detail, based on the household survey in Table 5.3 and visitor spending.

5.5.3 **Visitor spending-** For the 2021 Retail Capacity Study, the estimates of visitor spending in Fife derive from the STEAM report for Fife (2019). We did not apply the results from the 2020 STEAM report which were greatly reduced from 2019 because of the effects of the Covid pandemic reducing visitor spend. Visitor spend is anticipated to resume to at least pre-pandemic levels in the future, in our view.

5.5.4 The data replaces the estimates of visitor spending applied in previous versions of the previous Retail Capacity Study which were based on the 'Cambridge' analytical model.

5.5.5 The STEAM method is now the Council's preferred dataset for visitor expenditure analysis. It is widely used by local authorities. Therefore, we have applied it in this Capacity Study after consultation with the Council. It should be noted that the estimates of visitor spending on shopping in Fife are very much lower under the STEAM analysis compared to those under the Cambridge model.

5.5.6 **Expenditure and turnover forecasts -** Tables 5.4 to 5.7 show the survey-based convenience expenditure and turnover relationships for each catchment area and for Fife in 2021, 2026 and 2031. There is not much difference between the figures in the 2020 Study for West Fife and Mid Fife. The turnover estimates for East Fife are appreciably reduced because of the lower forecast visitor spending under in the STEAM data.

5.6 Convenience floorspace and turnover 2021

5.6.1 The distribution of convenience floorspace in the three retail catchment areas is shown in Tables 5.8 to 5.10. The floorspace data is mainly based on *Goad surveys for 2021*. Other sources include Council data for most of the main out of centre supermarkets for example, which will not have changed apart from new additions.

5.6.2 Average company turnover/ floorspace ratios from the Retail Rankings 2021 are applied to the main supermarkets and discount foodstores, with adjustments to include VAT and remove petrol/ non-retail sales, expressed in 2020 prices. These ratios embrace research published by Mintel on the split of convenience and comparison floorspace among the various operators and the associated division of turnover.

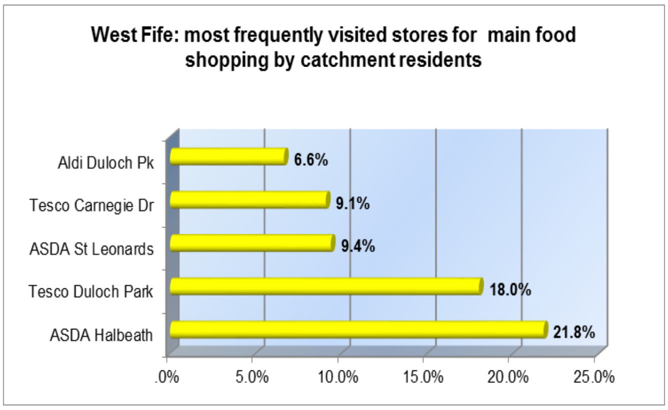
5.6.3 Estimated average turnover ratios are applied to all other shops. Those in the smaller towns are apportionments from the turnover ratios in the largest town centres in each catchment area. Tables 5.8 to 5.10 show the total average turnover in each catchment area at average levels, based on this method.

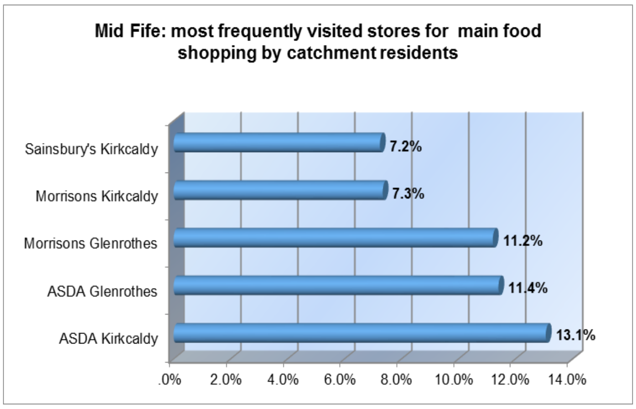
5.6.4 Comparison with the survey-based totals (actual turnover) is included for each area. This reveals significant under-trading in West Fife, slight under-trading in Mid Fife and moderate under-trading at below average levels in East Fife.

5.6.5 On a technical point, there is no widely agreed benchmark for determining any over/ under-trading. Some consultants ignore the subject and rely on the survey- based ratios only, although there are issues related to accuracy at the individual store level and consistency in the treatment of turnover of new development proposals.

Figure 5.1 Main food shopping patterns- most frequently visited stores (household survey)

Q1 & Q2 combined, excluding don't knows, varies, internet





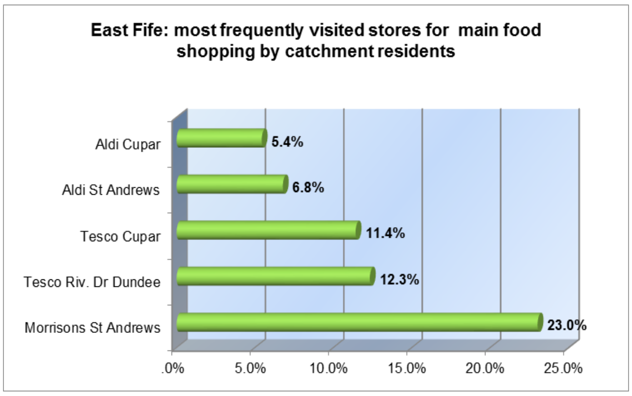


Table 5.4
West Fife convenience expenditure and turnover (in 2020 prices)

	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		293.1	279.4	286.1
Add: inflows from rest of Fife	12%	33.9	32.3	33.1
inflows from outside Fife	1%	4.2	4.0	4.1
Less: outflows	-8%	-24.7	-23.5	-24.1
Retained expenditure (turnover)		306.5	292.2	299.2

Note
Inflows and outflows from Appendix 2

Table 5.5
Mid Fife convenience expenditure and turnover (in 2020 prices)

	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		427.7	408.7	419.2
Add: inflows from rest of Fife	6%	24.0	23.0	23.6
inflows from outside Fife	1%	4.1	3.9	4.0
Less: outflows	-13%	-55.4	-53.0	-54.3
Retained expenditure (turnover)		400.4	382.6	392.5

Note
Inflows and outflows from Appendix 2

Table 5.6
East Fife convenience expenditure and turnover (in 2020 prices)

	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		136.5	127.8	129.2
Add: inflows from rest of Fife	9%	11.7	11.0	11.1
inflows from outside Fife	5%	6.4	6.0	6.1
Less: outflows	-27%	-37.0	-34.7	-35.0
Retained expenditure (turnover)		117.7	110.2	111.4

Note
Inflows and outflows from Appendix 2

Table 5.7
Fife convenience expenditure and turnover (in 2020 prices)

	%	2021 £million	2026 £million	2031 £million
Council area residents' expenditure potential		857.3	816.0	834.5
Add:				
inflows from outside Fife	2%	14.7	14.0	14.4
Less: outflows	-6%	-47.5	-45.2	-46.2
Retained expenditure (turnover)		824.5	785.0	803.0

Note
Inflows and outflows from Appendix 2

Table 5.8
West Fife: convenience floorspace and turnover, 2021 (in 2020 prices)

	Floorspace sq m		Av. turnover	Turnover
	gross	net	ratio £/sq m	£million
Dunfermline Town Centre				
*Marks & Spencer Foodhall	510	332	9,636	3.2
*Rest of Town Centre	2,720	1,768	5,800	10.3
Sub total	3,230	2,100		13.4
*Tesco, Winterthur Lane (total 8,290 sq m gross-est 70% conv)	5,803	3,482	13,036	45.4
*ASDA Halbeath (total 9,540 goad + 1,162 mez) sq m gross- est 55% conv	5,886	3,532	14,852	52.5
ASDA St Leonards-total 4,749 sqm (75% conv)	3,562	2,137	14,852	31.7
Tesco Duloch-total 6,147 sq m (82% conv)+ ext 2,747 (22%conv)	5,645	3,387	13,036	44.2
Aldi Duloch (06/01592- floorplan 1,606 sqm gross, 1,125 net -est 80% conv)	1,285	900	14,147	12.7
Dobbies Garden Centre- Farm food hall (estimate)	400	360	8,500	3.1
Sainsbury's Food Hall, Dobbies Garden Centre	1,140	741	12,696	9.4
Tesco Express, Aberdour Rd	326	228	15,198	3.5
Aldi Halbeath Rd (13/03345-1,657 gross,1,158 net -includes extension- est 80% conv	1,340	926	14,147	13.1
Iceland, Halbeath Rd	800	560	7,609	4.3
*Farmfoods, Carnegie Retail Park	750	525	5,653	3.0
*Home Bargains, Carnegie RP (1,010 sq gross- 40% conv)	404	283	5,300	1.5
Other Dunfermline shops	2,794	1,816	3,770	6.8
Co-op, Linburn Rd, Dunfermline	319	191	10,132	1.9
Rosyth	1,227	798	3,770	3.0
Tesco, Rosyth	1,609	965	13,036	12.6
Sainsbury's Local, Camdean, Rosyth	350	263	16,528	4.3
*Inverkeithing	760	494	3,770	1.9
Crossgates	566	368	3,770	1.4
*Kincardine	330	215	3,770	0.8
*Tesco Metro, Dalgety Bay	1,840	1,288	13,036	16.8
Aldi, Donibristle, Dalgety Bay - new (1,650 sq m gross, 1,125 net - est 80% conv)	1,320	900	14,147	12.7
*Rest of Dalgety Bay	80	52	3,770	0.2
ASDA Dalgety Bay (3,437 sq m gross 80% conv)	2,750	1,650	14,852	24.5
Oakley, Saline, Torryburn, H Valleyfield, Crossford, Comrie, Cairneyhill, Charleston, Inverkeithing Mini Market 120sqm, plus few others	1,715	1,115	3,770	4.2
Sub total	43,000	27,175		315.4
Cowdenbeath Town Centre				
*Morrisons	2,110	1,055	12,603	13.3
Lidl North End Park (1,794 sq m gross, 1,066 sq m net- est 80% conv.)	1,435	853	8,446	7.2
B&M North End Park (1,858 sq gross,1,674 sq m net- 25% conv)	465	419	3,952	1.7
*Rest of Town Centre	2,550	1,658	4,060	6.7
Sub total	6,560	3,984		28.9
Aldi, Cowdenbeath (14/00803-1,587 sq m gross, 1,140 sq m net, 844 net conv)	1,174	844	14,147	11.9
*Kelty	390	254	3,770	1.0
Total West Fife turnover at average levels				370.7
Under- trading below average levels	*-17%*			*-64.2*
Total West Fife	**54,354**	**34,355**		**306.5**

Note
* Goad gross floorspace data 2021 provided by the Council.
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2020 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 35% for 2021, to allow for the general decline in shop numbers over the period. Average supermarket turnover ratios based on the Retail Ranking 2021 and other Mintel research on supermaket operator floorspace, adjusted to remove petrol sales, plus an allowance for VAT added- in 2020 prices.
Cowdenbeath TC turnover/ floorspace ratio (excluding Morrisons) assumed at 70% of Dunfermline TC turnover ratio.
Other small towns at 65% of Dunfermline TC turnover ratio.

Table 5.9
Mid Fife: convenience floorspace and turnover, 2021 (in 2020 prices)

	Floorspace sq m		Av. turnover	Turnover
	gross	net	ratio £/sq m	£million
Kirkcaldy Town Centre				
Food Warehouse - former Lidl Esplanade. Opended Nov 2021				
1,286 sq m gross & 966 sq m net	1,286	966	7,609	7.4
*Rest of Town Centre	3,000	1,950	5,800	11.3
Sub total	4,286	2,916		18.7
Lidl (new)-at Stagecoach depot site (relocation from Esplanade) 20/00450/FULL				
2,018 sq m gross, 1,410 sq m net 85% conv	1,715	1,199	8,446	10.1
Morrisons, Invertiel				
6,369 sq m gross, 3,519 sq m net-2,815 sq m conv (80%)	5,095	2,815	12,603	35.5
ASDA, Kirkcaldy	7,133	3,846	14,852	57.1
11,889 sq m gross (Council)- 6,410 sq m net at 60:40 conv/ comp sales				
*Sainsbury's, Fife Central Retail Park (5,610 sq m gross- 85% conv)	4,769	2,861	12,696	36.3
*M&S Simply Food, Fife Central RP	1,020	714	9,636	6.9
Greggs, Fife Central Retail Park	200	130	7,044	0.9
Aldi, McKenzie St, Kirkcaldy (1,493 sq m gross total)- 80% conv	1,194	836	14,147	11.8
Aldi, Ferrard Rd, Kirkcaldy				
(Total 1606 sq m gross/ 1,125 net- est 80% conv)	1,285	900	14,147	12.7
Other Kirkcaldy shops	2,777	1,805	3,770	6.8
Dysart	309	201	3,770	0.8
Coaltown of Wemyss	37	24	3,770	0.1
Ballingry	685	445	3,770	1.7
*Lochgelly	560	364	3,770	1.4
Lochore	434	282	3,770	1.1
Cardenden	1,645	1,069	3,770	4.0
*Burntisland	1,490	969	3,770	3.7
Kinghorn & Aberdour	616	401	3,770	1.5
Sub total	30,964	18,860		192.4
Glenrothes Town Centre				
*Kingdom Centre	2,350	1,528	5,800	8.9
M&S Simply Food, Unit 1, North Street 15/03140/PPP & 16/02458/ARC	1,172	820	9,636	7.9
Food Warehouse, Unit 5, North Street (plan application as above)	960	672	7,609	5.1
Farm Foods, Units 1&2, North Street (plan application as above)	836	585	5,653	3.3
Sub total	5,318	3,605		25.2
*Morrisons, Flemington Rd, Glenrothes (4,730 sq m gross-80% conv)	3,784	1,892	12,603	23.8
Lidl, Leslie Rd, Glenrothes (1,000 sq m gross-90%conv)	900	630	8,446	5.3
*Aldi, Flemington Rd, Glenrothes (1,300 sq m gross- est 80% conv)	1,040	728	14,147	10.3
*B&M, Flemington Rd, Glenrothes (1,500 sq m gross- 25% conv)	375	263	3,952	1.0
ASDA, Fullerton Rd, Glenrothes				
(Total 7,897 sq m gross- 4,343 sq m gross conv)	4,343	2,606	14,852	38.7
*Cadham Centre, Glenrothes	850	553	3,770	2.1
Iceland, Glenwood, Glenrothes	630	441	7,609	3.4
*Other Glenwood shops, Glenrothes	440	286	3,770	1.1
Tesco Express, Sth Park Rd, Glenrothes	410	287	15,198	4.4
Other Glenrothes shops (notional estimate)	1,625	1,056	3,770	4.0
Leslie	543	353	3,770	1.3
Markinch	497	323	3,770	1.2
Kinglassie & Thornton	608	395	3,770	1.5
Falkland & Freuchie	410	267	3,770	1.0
Ladybank & Kettlebridge	355	231	3,770	0.9
Sub total	16,809	10,309		100.0
Leven Town Centre				
*Sub total-Town Centre shops (excluding Riverside Retail Park)	2,160	1,404	4,060	5.7
*Sainsbury's, Riverside RP	2,700	1,620	12,696	20.6
*B&M, Riverside RP (1,530 sq m gross- 25% conv)	383	268	3,952	1.1
*Home Bargains, Riverside Rd (2060 sq m gross- 40% conv)	824	577	5,300	3.1
*Lidl, Mitchell St, Leven (1,060 sq m gross-90% conv)	954	668	8,446	5.6
Aldi, Turpie Rd, Leven-1,480sqm gross, 990 sq m net- 80% conv	1,184	792	14,147	11.2
Sub total	6,045	3,924		41.5
East Wemyss	257	167	3,770	0.6
Methil/ Methilhill	2,161	1,405	3,770	5.3
Buckhaven	1,128	733	3,770	2.8
Kennoway & Windygates & Upper Largo	720	468	3,770	1.8
Lundin Links & Lower Largo	329	214	3,770	0.8
Newburgh & Strathmiglo & Auchtermuchty	615	400	3,770	1.5
Sub total	5,211	3,387		12.8
Total Mid Fife turnover at average levels				396.2
Over- trading above average levels	*1%*			*4.2*
Total Mid Fife	**70,792**	**44,405**		**400.4**

Note
* Goad gross floorspace data 2021 provided by the Council.
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2020 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 35% for 2021, to allow for the general decline in shop numbers over the period. Average supermarket turnover ratios based on the Retail Ranking 2021 and other Mintel research on supermaket operator floorspace, adjusted to remove petrol sales, plus an allowance for VAT added- in 2020 prices.
Glenrothes TC turnover/ floorspace ratio assumed same as Kirkcaldy TC turnover ratio. Leven TC turnover ratio assumed at 70% of Kirkcaldy TC turnover ratio.
Other small towns at 65% of Kirkcaldy TC turnover ratio.

Table 5.10
East Fife: convenience floorspace and turnover, 2021 (in 2020 prices)

	Floorspace sq m		Av. turnover	Turnover
	gross	net	ratio £/sq m	£million
St Andrews Town Centre				
*Tesco Metro	1,350	945	13,036	12.3
*Sainsbury's Local	600	420	16,528	6.9
*Rest of Town Centre	2,000	1,300	4,920	6.4
Sub total	3,950	2,665		25.7
Morrisons, St Andrews	3,740	1,870	12,603	23.6
Aldi, Tom Stewart Lane, St Andrews (1,331 sq m gross-80% conv)	1,065	746	14,147	10.5
M&S Simply Food, Largo Rd	1,395	977	9,636	9.4
Other St Andrews shops	394	256	3,936	1.0
Balmullo, Guardbridge,Kingsbarns, Leuchars, S'kinness	917	596	3,936	2.3
Sub total	7,510	4,444		46.9
Cupar Town Centre				
*Co-op	1,200	780	10,132	7.9
*Lidl (total 2,000 sq m gross) 80% conv	1,600	1,040	8,446	8.8
*Rest of Town Centre	2,180	1,417	4,428	6.3
Sub total	4,980	3,237		23.0
Tesco, Cupar (total 2,033 sq m gross/ 1,338 net-c70% conv- agent data)	1,423	937	13,036	12.2
Aldi, South Rd, Cupar (total 1,587 sq m gross- 80% conv)	1,270	889	14,147	12.6
Ceres & Dairsie	368	239	3,936	0.9
*Anstruther	500	325	3,936	1.3
Cellardyke & Crail & St Monans & Pittenweem	820	533	3,936	2.1
Elie & Colinsburgh	263	171	3,936	0.7
Tayport/Wormit & Newport	990	643	3,936	2.5
Sub total	5,634	3,737		32.3
Total East Fife turnover at average levels				127.8
Under- trading below average levels	*-8%*			*-10.1*
Total East Fife	**22,075**	**14,083**		**117.7**

Note
* Goad gross floorspace data 2021 provided by the Council.
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2020 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 35% for 2021, to allow for the general decline in shop numbers over the period. Average supermarket turnover ratios based on the Retail Ranking 2021 and other Mintel research on supermaket operator floorspace, adjusted to remove petrol sales, plus an allowance for VAT added- in 2020 prices.
Cupar TC turnover/ floorspace ratio assumed at 90% of St Andrews TC turnover ratio. Other small towns assumed at 80% of St Andrews TC turnover ratio.

5.7 Online food shopping

5.7.1 Among those who bought their groceries on the internet in Fife, the 2016 household survey indicates that, for main food shopping (Q1&Q2), 40% used Tesco, 18% used ASDA, and 11% used Sainsbury's. Levels of online spending on convenience goods are higher compared to those in the 2020 Capacity Study- see Table 5.1 footnote.

5.7.2 The pandemic has driven a surge in the demand for online delivery shopping compared to 2016 It appears likely to remain in the future.

5.8 Convenience planning consents & opportunities

5.8.1 Table 5.11 shows the current convenience retail planning consents and opportunities in Fife. These include two proposed discount foodstores, a budget mixed goods retailer, and an M&S Simply Food store. The commitments require to be deducted from forecasts of spare capacity.

5.8.2 In West Fife, there has been no start on development of the consent for a new Lidl store in Rosyth, but it is scheduled to open in 2022. At Halbeath Retail Park, there is a Section 42 application to vary the terms of the existing consent to allow more flexibility in relation to convenience floorspace- pending consideration.

5.8.3 In Mid Fife, the Lidl store at the former bus depot is now operational. Their old unit on Esplanade re-opened as a Food Warehouse store in November 2021. The existing consents for the Kingslaw and Burnside neighbourhood centres remain, but there is a current application for a replacement neighbourhood centre scheme.

5.8.4 There are two other relatively minor consents awaiting development- see Table 5.11. In East Fife, the consent at South Road, Cupar is being developed, but with negligible convenience floorspace (Baynes).

Table 5.11
Proposed convenience floorspace in Fife: consents and applications 2021 (in 2020 prices)

	Floorspace sq m		Turnover	Turnover
	gross	net	ratio £/sq m	£million
Planning consents included in the 2021 Capacity Study				
Yard Public House site, Admiralty Rd, Rosyth 17/01554/FULL not built Proposed Lidl supermarket- (total 2,367sq m gross. Conv 2,012 sq m and 355 sq m comp. To open in 2022 (Lidl website)	2,012	1,408	8,446	11.9
Halbeath Retail Park- extension 16/01927/FULL- subject to S75 agreement -not built Units 9 & 11- 4,532 sq m gross convenience floorspace - for: M&S Simply Food Lidl- (2,488 sqm gross total-80% conv) Other proposed units are for bulky goods (5,435 sq m gross)	2,044 1,990	1,329 1,393	9,636 8,446	12.8 11.8
Section 42 application subitted to allow up to 50% of sales floorspace in units 1-4 to sell convenience goods 20/01189/FULL- pending consideration				
Dobbies Hillend IE Dalgety Bay 20/03217/FULL Approved 2021 B&M store: 2,508 sq m gross. 2,323 sq m net with 1,858 sq m comp and 465 sq m conv sales	502	465	3952	1.8
Main Street, Halbeath- (20/00545/FULL) Three Class 1 retail units, two Class 3 café/ restaurant units with drive-thru and one Class 3 restaurant with parking- approved 1/10/2020. No floorspace information				
Kingslaw Village/ Burnside Neighbourhood Centres 10/01774/EIA-stores not built yet Kirkcaldy-Two supermarkets- 1,500 sq m gross and 370 sq m gross- not built	1,870	1,309	8,500	11.1
39 Rosslyn St, Kirkcaldy 20/03008/FULL- Approved 2021 Unit 1: 515 sqm, Unit 4: 130 sq m Units 2&3 total 348 sq m (takeaways)	645	452	8,500	3.8
10 Low Road, Auchtermuchty 20/02618/FULL- Co-op	418	277	10,132	2.8
Land to East of Durie St, Leven 20/00330/FULL Approved 21/08/2020 4 retail units Class 1 Total 360 sq m. Estimate 50% conv, 50% comp	180	126	8,500	1.1
South Road, Cupar 19/03537/FULL and 21/02199 (Latest development scheme)- under construction Convenience element (Baynes baker, 93 sq m) negligible. See comparison retail consents table				
Current applications and Masterplan: not included in the 2021 Capacity Study				
Inglis St, Dunfermline 17/01812/FULL- demolition of tile warehouse and devt.-not built of 3 retail units. Total 1,289 sq m gross. Assume 432 sq m for conv. Other 2 units for comparison (432 sq m and 425 sq m). Consent extended to 7th April 2021 Consent for renewal: Application 21/02989 **invalid**.				
Freescale site (Shepherd Offshore), Dunfermline -16/03359/ARC Now scheduled for education development -Learning Campus with college buildings and two high schools. V minor retail component				
Kingslaw Neibourhood Centre- 21/01265/ARC-pending consideration New scheme to replace consent 10/0177E referenced above. Mixed uses in 9 units, including Class 1 retail- total 1,208 sq m. Another separate unit at 167 sq m				
Craigtoun- St Andrews West SDA 15/01823/EIA Approved 08/10/19 Proposed expansion of St Andrews. It includes provision for commercial land uses which could include some retail. No details yet.				
Note Gross floorspace from the Council. Estimated turnover of the consents are based on company averages from the 2021 Retail Rankings for named operators and a nominal turnover ratio applied to the other consents with no specified operator. Very minor retail consents have not been included. Estimated turnover of the Craigtoun development proposal is not shown here because the details are yet to be finalised.				

6 Convenience expenditure capacity

6.1 Introduction

6.1.1 This section provides estimates of the spare convenience retail expenditure capacity that could service new retail floorspace in each of the three retail catchment areas. The forecasts of spare capacity are for the periods 2021-26, 2065-31 and for the total ten-year period 2021-31, after allowing for the existing planning commitments.

6.2 Definition

6.2.1 The planning context for defining spare capacity is the level of new retail development that can be accommodated without threatening the vitality and viability of established town centres. Spare retail capacity can exist in the following forms:

- Any current over-trading
- Growth in retained expenditure (turnover)
- Potential to claw back expenditure leakage
- Potential to attract new trade into the area
- ‘Acceptable’ levels of impact

6.2.2 A range of spare capacity can be prepared from these components, showing a low and high estimate, after deducting planning commitments. For convenience retail capacity, the *low estimate* includes any over-trading and the forecast growth in expenditure in the catchment areas over the target periods. The *high estimate* also includes the potential to claw back leakage and attract new trade into the catchment areas. Provision of a range of spare capacity normally reduces the need for sensitivity tests.

6.2.3 ‘Acceptable’ levels of retail impact refer to the situation where new developments would not threaten the vitality and viability of established centres. By convention, this aspect is not usually embraced into capacity studies, because it is normally addressed by retail impact assessments in support of specific retail planning applications. The Council would then assess whether the retail impacts are ‘acceptable’ in terms of their effects on the vitality and viability of town centres.

6.2.4 The forecasts of spare convenience expenditure capacity in this report also include associated equivalent net floorspace estimates for broad guidance, based on the average turnover/floorspace ratio of the four main supermarket operators plus Aldi and Lidl, as shown in the footnotes to the tables. The equivalent floorspace associated with the expenditure capacity would be greater for other operators with lower turnover ratios.

6.2.5 More weight should be given to the expenditure capacity figures, because retailer performance and formats varies widely.

6.3 Spare convenience expenditure capacity

6.3.1 **Low estimates-** Tables 6.1 to 6.3 show the forecast spare convenience expenditure for each of the three retail catchment areas.

6.3.2 Assuming the current consents shown in Table 5.11 are developed, there is a predicted substantial negative spare expenditure capacity in West Fife, moderate negative spare expenditure capacity in Mid Fife and slight negative spare capacity in East Fife (under the high estimate at least) over the next ten years.

6.3.3 **High estimates-** For estimates at the high end of the range to apply, there would have to be potential to accommodate a supermarket which would reduce leakage and attract some new trade. In today’s retail market, this is more likely to include a discount foodstore, sometimes in combination with another type of store. The extent of the trade draw will be smaller compared to a superstore or mid-size supermarket, so the potential for attracting new customers into any of the three Fife catchments from beyond is likely to be low generally.

6.3.4 For the three catchment areas, a notional allowance for potentially capturing up to 50% of the convenience expenditure outflows from each catchment to centres outside Fife has been included as the basis for the high estimate, over and above the low estimate.

6.3.5 The resulting levels of recaptured leakage are either small (West and Mid Fife) or modest, as in East Fife. The choice of this approach avoids overlap where reduced leakage in one catchment may mean increased trade loss in another.

6.4 Interpretation

6.4.1 The 2021 Capacity Study shows that Fife is well-provided with supermarkets and discount foodstores. While there is no forecast spare convenience capacity in each of the three catchment areas up to 2031, (especially in West Fife), it does not mean no new development beyond the existing consents, just not very much.

6.4.2 Our summary of national trends in section 3 indicates a trend towards more localised convenience shopping trips as part of changing life-styles, with more people working from home and increasing traffic congestion making trips by car tiresome. Consideration of additional new store development proposed in the future would be more an issue of improved quality and choice, rather than meeting a deficiency in convenience floorspace as such.

6.4.3 The lack of forecast capacity would not generally be an obstacle to providing for this trend. However, the next LDP would need to identify opportunity locations for additional local or neighbourhood centre provision.

Table 6.1
West Fife: forecast spare convenience expenditure capacity (in 2020 prices)

			2021-26 £million	2026-31 £million	2021-31 £million
(a) Current under-trading (Table 5.8)			-64.2		-64.2
(b) Growth in retained expenditure (turnover)- Table 5.4			-14.3	7.0	-7.3
(c) Less planning commitments: (selected consents- Table 5.11)			-38.3		-38.3
Low estimate	(a+b+c)		**-116.8**	**7.0**	**-109.8**
(d) Add: potential to reduce outflow	*2026*	*2031*			
Outflow £million- Table 5.4	-23.5	-24.1			
Outflows to centres outside Fife-Tables 5.3 & 5.4	-12.8	-13.1			
Potential to clawback up to 50% of leakage to centres outside Fife			6.4	0.15	6.6
(e) Add:potential to increase inflow- Table 5.4					
Assume negligible					
High estimate	(a+b+c+d+e)		**-110.4**	**7.1**	**-103.2**
Equivalent convenience floorspace			£ per sq m	£ per sq m	
* Turnover/ floorspace ratio			12,024	12,300	
			sq m net	sq m net	sq m net
Low			*-9,700*	*600*	-9,100
High			*-9,200*	*600*	-8,600

Note
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. *Figures are rounded.*
* The turnover ratio derives from the 2021 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons, ASDA, Aldi and Lidl, at £12,630 per sq m. The ratio is adjusted to relate to 2026 and 2031, based on % turnover growth in Fife -Table 5.7

Table 6.2
Mid Fife: forecast spare convenience expenditure capacity (in 2020 prices)

			2021-26 £million	2026-31 £million	2021-31 £million
(a) Current under-trading (Table 5.9)			4.2		4.2
(b) Growth in retained expenditure (turnover)- Table 5.5			-17.8	9.8	-7.9
(c) Less planning commitments: (selected consents- Table 5.11)			-18.8		-18.8
Low estimate	(a+b+c)		**-32.4**	**9.8**	**-22.6**
(d) Add: potential to reduce outflow	*2026*	*2031*			
Outflow £million- Table 5.5	-53.0	-54.3			
Outflows to centres outside Fife-Tables 5.3 & 5.5	-10.1	-10.4			
Potential to clawback up to 50% of leakage to centres outside Fife			5.1	0.13	5.2
(e) Add:potential to increase inflow- Table 2.5					
Assume negligible					
High estimate	(a+b+c+d+e)		**-27.3**	**10.0**	**-17.4**
Equivalent convenience floorspace			£ per sq m	£ per sq m	
* Turnover/ floorspace ratio			12,024	12,300	
			sq m net	sq m net	sq m net
Low			*-2,700*	*800*	-1,900
High			*-2,300*	*800*	-1,500

Note
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. *Figures are rounded.*
* The turnover ratio derives from the 2021 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons, ASDA, Aldi and Lidl, at £12,630 per sq m. The ratio is adjusted to relate to 2026 and 2031, based on % turnover growth in Fife -Table 5.7

Table 6.3
East Fife: forecast spare convenience expenditure capacity (in 2020 prices)

				2021-26 £million	2026-31 £million	2021-31 £million
(a) Current under-trading (Table 5.10)				-10.1		-10.1
(b) Growth in retained expenditure (turnover)- Table 5.6				-7.5	1.2	-6.3
(c) Less planning commitments: Table 5.11				0		0
Low estimate	(a+b+c)			**-17.6**	**1.2**	**-16.4**
(d) Add: potential to reduce outflow		*2026*	*2031*			
Outflow £million- Table 5.6		-34.7	-35.0			
Outflows to centres outside Fife-Tables 5.3 & 5.6		-22.0	-22.2			
Potential to clawback up to 50% of leakage to centres outside Fife				11.0	0.12	11.1
(e) Add:potential to increase inflow- Table 2.6						
Assume negligible						
High estimate	(a+b+c+d+e)			**-6.6**	**1.3**	**-5.3**
Equivalent convenience floorspace				£ per sq m	£ per sq m	
* Turnover/ floorspace ratio				12,024	12,300	
				sq m net	sq m net	sq m net
Low				*-1,500*	*100*	-1,400
High				*-600*	*100*	-500

Note

Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. *Figures are rounded.*

* The turnover ratio derives from the 2021 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons, ASDA, Aldi and Lidl, at £12,630 per sq m. The ratio is adjusted to relate to 2026 and 2031, based on % turnover growth in Fife -Table 5.7

7 Comparison expenditure and turnover

7.1 Introduction

7.1.1 This section of the report assesses the comparison expenditure and turnover relationships for each the three retail catchment areas and for Fife, taking account of the comparison shopping patterns identified by 2016 NEMS household shopping interview survey.

7.1.2 The distribution of the turnover among the various towns and retail parks is controlled to the total deduced turnover for each catchment area from the shopping patterns.

7.2 Comparison goods-definition

7.2.1 Comparison goods include:

- *Books*
- *Clothing and footwear*
- *Furniture, floorcoverings & household textiles*
- *Audi visual equipment and other durable goods (domestic appliances and phones)*
- *Hardware and DIY supplies (repair and maintenance materials)*
- *Chemists' goods*
- *Jewellery, watches and clocks*
- *Bicycles*
- *Recreational and other miscellaneous goods*

7.2.2 This definition is provided in the *Precisely* (formerly Pitney Bowes) Retail Expenditure Guide 2021/22, based on ONS classifications.

7.3 Comparison expenditure potential and the internet

7.3.1 Table 7.1 shows the forecast comparison expenditure per capita data for each of the three retail catchment areas in Fife, based on data commissioned from Precisely for this study. The forecasts are based on those by *Oxford Economics*. For each of the three catchment areas, the forecasts incorporate the socio economic profile of the catchment to estimate the expenditure per capita of residents.

7.3.2 For the Fife catchment areas, the forecast comparison expenditure growth rates per annum from 2021-31 are explained in section 3 of the study, under 'Forecast retail expenditure trends'. The forecast growth rates by Precisely are low compared to the past, mainly due to their views on the effects of Covid. For example, the growth rates were well over 5% per annum for 2020-25 in the 2020 Capacity Study.

7.3.3 As explained in section 5, special forms of trading (SFT), which is almost entirely internet shopping, but includes a small proportion of mail order, are removed from the expenditure per capita data, so that it relates to conventional shop floorspace.

7.3.4 Precisely provides estimates and forecasts of the proportions of SFT from UK data. These are shown in the footnote to Table 7.1. Precisely explain that a reduction needs to be made to the proportions to allow for the overlap between non-store-based sales and store related internet sales. We have done this for 2021, 2026 and 2031 (10% reduction).

7.3.5 Precisely has estimated almost no change in the proportions of SFT from 2021 to 2026, then a material increase to 2031. As shown in Table 7.1, the proportion of comparison retail expenditure associated with internet spending is very substantial.

7.3.6 Forecasts of the total comparison expenditure potential of the residents of each retail catchment area are shown in Table 7.2. The growth to 2031 is the result of combining projected population growth with the forecast growth in expenditure per capita. The forecast total comparison expenditure growth for Fife residents between 2021 and 2031 is much lower than the forecast growth for 2020-30 in the 2020 Capacity Study. It reduces the potential to support additional comparison floorspace.

Table 7.1 **Fife comparison expenditure per capita per annum (in 2020 prices)**			
Catchment areas	2021 £	2026 £	2031 £
West Fife	3,938	4,286	4,774
Mid Fife	3,936	4,293	4,790
East Fife	3,909	4,182	4,610
**excluding special forms of trading*			
West Fife	*2,634*	*2,863*	*3,055*
Mid Fife	*2,632*	*2,867*	*3,066*
East Fife	*2,614*	*2,793*	*2,950*
Note - Source- *Precisely*			
Original expenditure per capita data in the top three rows provided by Precisely in their GeoInsight report 2021 for this study is in 2020 prices.			
Growth rate per annum		2021-26	2026-31
	West Fife	1.71%	2.18%
	Mid Fife	1.75%	2.22%
	East Fife	1.36%	1.97%
*The proportion of spending relating to Special Forms of Trading (SFT) requires to be deducted from data, so that it relates to retail floorspace. Most SFT comprises internet spending. Precisely publishes estimates of the proportions of SFT for the UK. The proportions in Precisely's Retail Expenditure Product Guide 2021/22, Table 3.4 are:			
	-36.8%	-36.9%	-40.0%
Precisely also advise that not all the forecast allowance for SFT should be deducted from expenditure, as there is some overlap between non-store based sales and store-related internet sales. They say that the extent of the overlap is unknown. For this study, we estimate a 10% reduction in Precisely's proportions to acknowledge the issue. This is applied for 2021, 2026 and 2031			
Deductions for SFT applied in this study	**-33.1%**	**-33.2%**	**-36.0%**

Table 7.2 **Fife residents' comparison expenditure potential (in 2020 prices)** ***Excluding SFT (special forms of trading)***					
Catchment areas	2021 £ million	*growth* *2021-26* *£ million*	2026 £ million	growth *2026-31* *£ million*	2031 £ million
West Fife	337.7	*29.3*	367.0	*23.8*	390.8
Mid Fife	479.3	*42.7*	522.0	*34.8*	556.8
East Fife	160.9	*11.0*	171.9	*9.3*	181.2
Total Fife	978.0	*82.9*	1,060.9	*67.9*	1,128.8
Note From Tables 1.1 and 7.1. Figures are rounded.					

7.4 Comparison shopping patterns- market shares

7.4.1 Information on comparison shopping patterns by residents of the three catchment areas was collected by the household survey for the 2016 Capacity Study. The method is the same as for convenience shopping. The most popular destinations are shown in the graphs in Figure 7.1, reproduced from the 2016 Capacity Study. The proportions of internet spending in Figure 7.1 will be higher now, compared to 2016.

7.4.2 For each of the five categories of comparison goods in Figure 7.1, the respondents were asked to identify where *they visited most often* to buy these goods (Q7-Q11). Respondents could identify up to two destinations (or internet) for each category.

7.4.3 The results were weighted and combined to reveal the shopping patterns for all comparison goods based on the household survey, as shown in Table 7.3, with the supporting information in Appendix 7 of the Fife Retail Capacity Study 2016.

7.4.4 Note that the proportions in Table 7.3 exclude SFT (internet/ mail order), to show physical destinations only and to achieve compatibility with the expenditure per capita data, which excludes SFT. Thus, the table highlights the shopping patterns between the three catchment areas and with centres outside Fife.

7.4.5 The main destinations for comparison shopping in West and Mid Fife are the towns and retail parks within these catchment areas. In East Fife, most comparison shopping by residents is done outside Fife (mainly in Dundee) and in Mid Fife.

Table 7.3
Fife Council area residents- all comparison shopping patterns (Q7-Q11 combined) 2016 (from household survey alone)

Catchment areas	Origin			
	West Fife	Mid Fife	East Fife	Fife Total
Destination				
West Fife	67%	10%	1%	28%
Mid Fife	7%	65%	10%	33%
East Fife	0%	1%	30%	7%
Outside study area	26%	24%	58%	32%
Total	100%	100%	100%	100%

Note
The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mail order

7.5 Comparison expenditure and turnover by catchment area

7.5.1 Like the analysis in section 5, the relationship between total expenditure and turnover in each catchment area is defined simply as: residents' expenditure potential plus inflows, less outflows equals total turnover.

7.5.2 Appendix 3 shows the estimates of comparison expenditure inflows to each catchment area in detail, based on the household survey (Table 7.3) and visitor spending. The updated research on visitor spending in Fife is explained under sub section 5.5, where the estimated visitor spending on comparison goods is much lower under the STEAM model compared to the method applied in the 2020 Capacity Study.

7.5.3 Tables 7.4 to 7.7 show the survey-based comparison expenditure and turnover relationships for each catchment area and for Fife in 2021, 2026 and 2031. Expenditure outflows from East Fife (mostly to Dundee) are proportionally much higher than West and Mid Fife because there are no major shopping centres in East Fife.

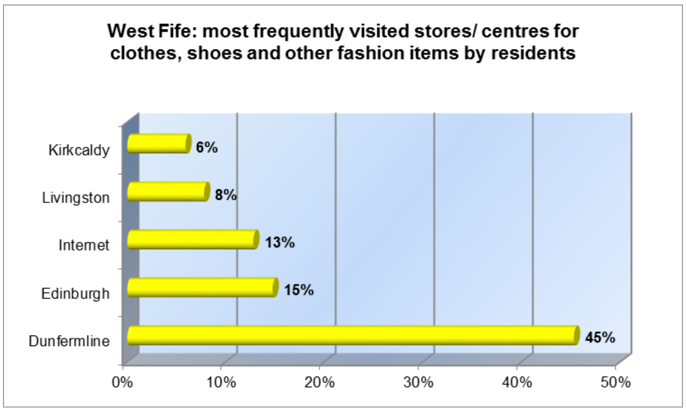
7.6 Comparison floorspace and turnover 2021

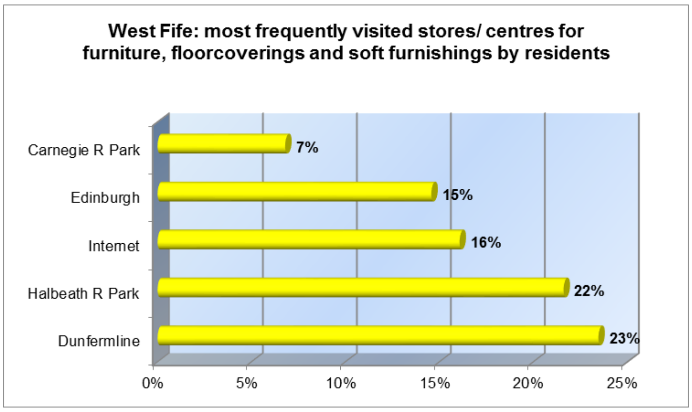
7.6.1 The distribution of comparison floorspace in the three retail catchment areas is shown in Tables 7.8 to 7.10, based on data for 2021 provided by Goad and other sources, including data from the Council, as explained in subsection 5.6.

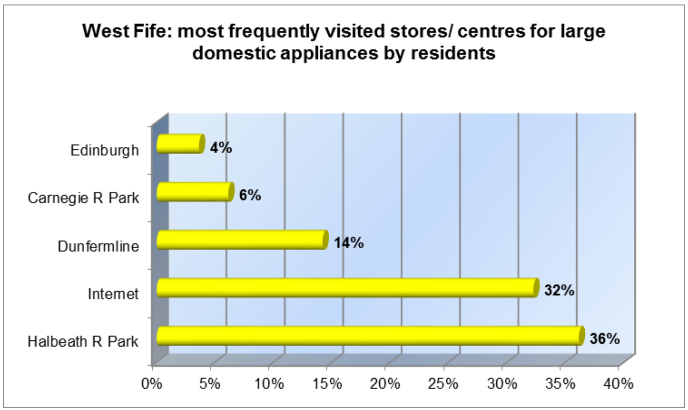
7.6.2 The total turnover in each catchment area is controlled to the survey-based totals shown earlier in this section. While the turnover of the retail warehouses and supermarkets are assumed at average company levels, the turnover relating to the town centres and villages is collectively derived from the survey totals for each of the three catchments. As for convenience turnover, the turnover ratios for the smaller towns are based on apportionment from the turnover ratio of the largest town centres in each catchment. These are estimated 'actual' levels, not average or benchmark levels.

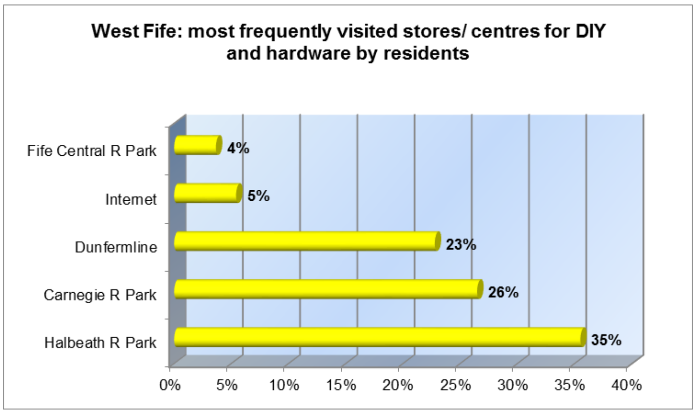
Figure 7.1 Comparison shopping- most frequently visited destinations (including internet): NEMS household survey 2016

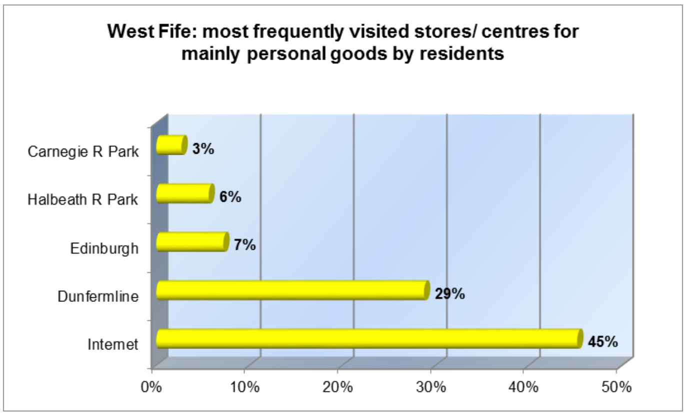
Goods categories graphs exclude *don't knows, don't buy, varies*

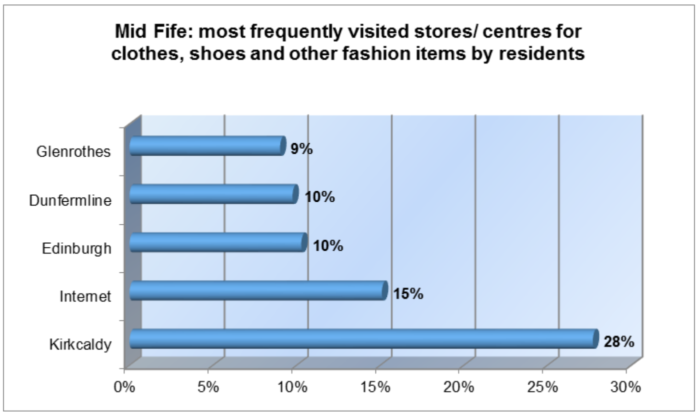


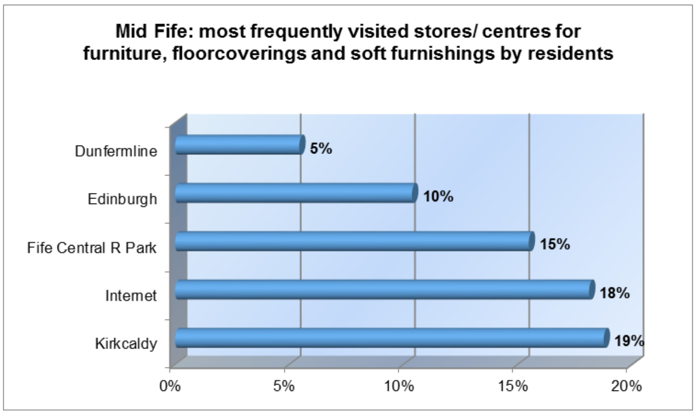


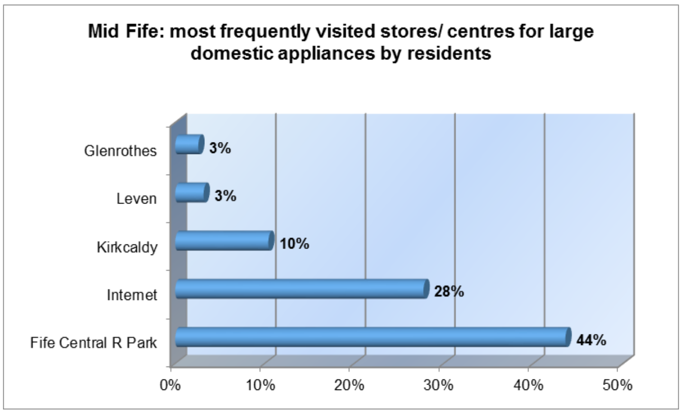


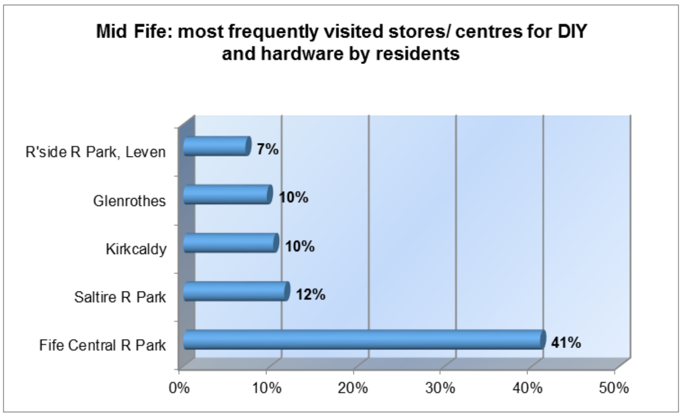


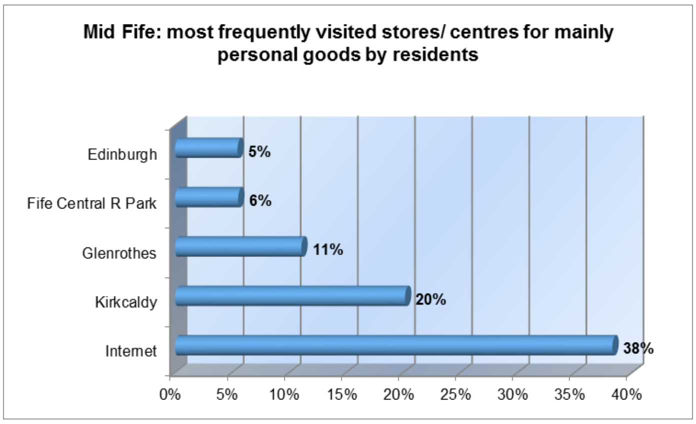


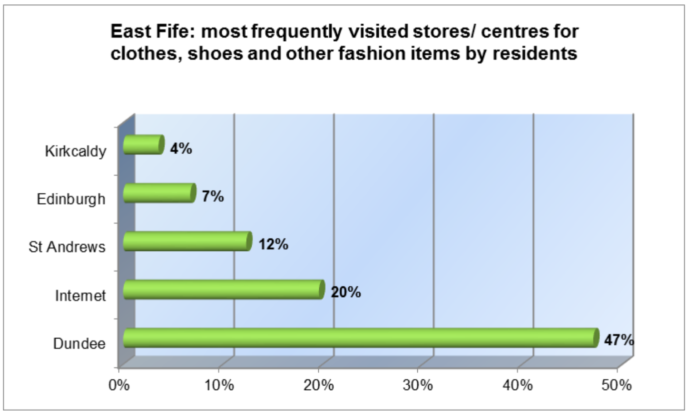


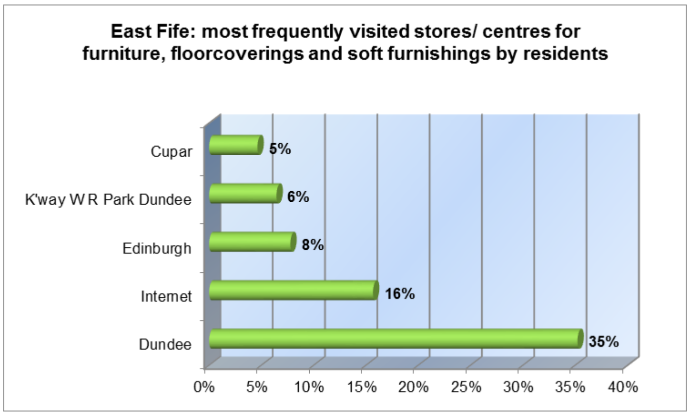

Mid Fife: most frequently visited stores/ centres for furniture, floorcoverings and soft furnishings by residents
Dunfermline 5%
Edinburgh 10%
Fife Central R Park 15%
Internet 18%
Kirkcaldy 19%
0% 5% 10% 15% 20%

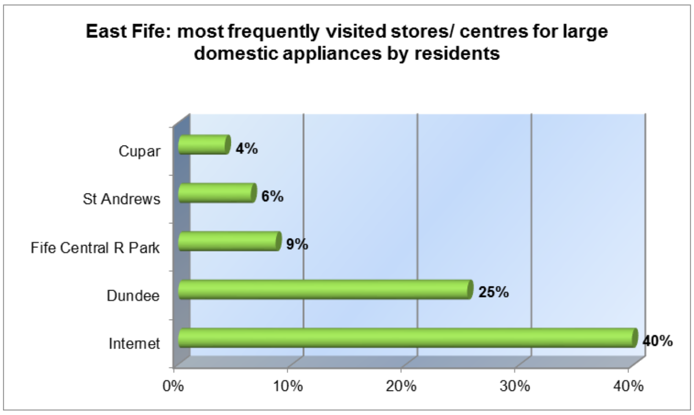

Mid Fife: most frequently visited stores/ centres for large domestic appliances by residents
Glenrothes 3%
Leven 3%
Kirkcaldy 10%
Internet 28%
Fife Central R Park 44%
0% 10% 20% 30% 40% 50%

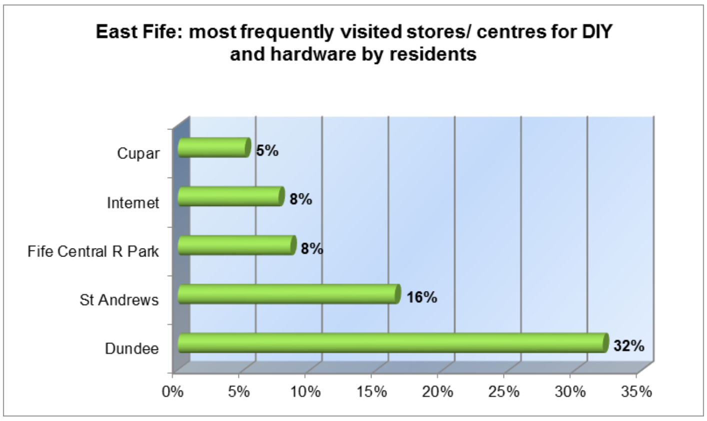

Mid Fife: most frequently visited stores/ centres for DIY and hardware by residents
R'side R Park, Leven 7%
Glenrothes 10%
Kirkcaldy 10%
Saltire R Park 12%
Fife Central R Park 41%
0% 10% 20% 30% 40% 50%


Mid Fife: most frequently visited stores/ centres for mainly personal goods by residents
Edinburgh 5%
Fife Central R Park 6%
Glenrothes 11%
Kirkcaldy 20%
Internet 38%
0% 5% 10% 15% 20% 25% 30% 35% 40%


East Fife: most frequently visited stores/ centres for clothes, shoes and other fashion items by residents
Kirkcaldy 4%
Edinburgh 7%
St Andrews 12%
Internet 20%
Dundee 47%
0% 10% 20% 30% 40% 50%


East Fife: most frequently visited stores/ centres for furniture, floorcoverings and soft furnishings by residents
Cupar 5%
K'way W R Park Dundee 6%
Edinburgh 8%
Internet 16%
Dundee 35%
0% 5% 10% 15% 20% 25% 30% 35% 40%


East Fife: most frequently visited stores/ centres for large domestic appliances by residents
Cupar
St Andrews
Fife Central R Park
Dundee
Internet
4%
6%
9%
25%
40%
0%
10%
20%
30%
40%


East Fife: most frequently visited stores/ centres for DIY and hardware by residents
Cupar
Internet
Fife Central R Park
St Andrews
Dundee
5%
8%
8%
16%
32%
0%
5%
10%
15%
20%
25%
30%
35%

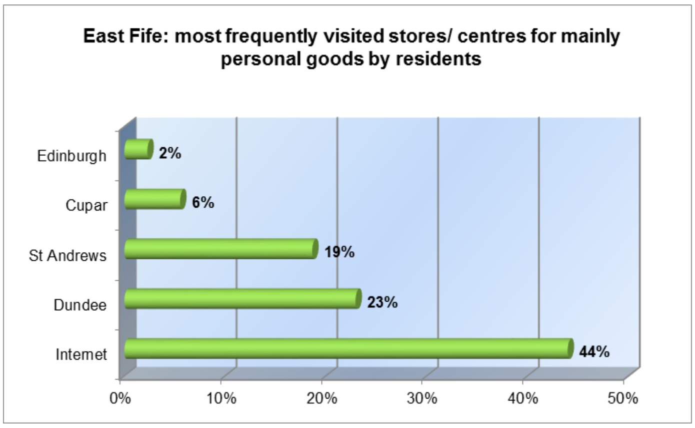

East Fife: most frequently visited stores/ centres for mainly personal goods by residents
Edinburgh
Cupar
St Andrews
Dundee
Internet
2%
6%
19%
23%
44%
0%
10%
20%
30%
40%
50%

Table 7.4
West Fife comparison expenditure and turnover (in 2020 prices)

	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		337.7	367.0	390.8
Add: inflows from rest of Fife	15%	49.8	54.1	57.6
inflows from outside Fife	2%	7.8	8.5	9.1
Less: outflows	-33%	-112.8	-122.5	-130.5
Retained expenditure (turnover)		282.6	307.0	327.0

Note
Inflows and outflows from Appendix 3

Table 7.5
Mid Fife comparison expenditure and turnover (in 2020 prices)

	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		479.3	522.0	556.8
Add: inflows from rest of Fife	9%	41.9	45.7	48.7
inflows from outside Fife	2%	7.6	8.3	8.8
Less: outflows	-35%	-170.1	-185.3	-197.6
Retained expenditure (turnover)		358.8	390.7	416.7

Note
Inflows and outflows from Appendix 3

Table 7.6
East Fife comparison expenditure and turnover (in 2020 prices)

	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		160.9	171.9	181.2
Add: inflows from rest of Fife	4%	6.9	7.3	7.7
inflows from outside Fife	7%	12.0	12.8	13.5
Less: outflows	-70%	-111.9	-119.5	-126.0
Retained expenditure (turnover)		67.8	72.5	76.4

Note
Inflows and outflows from Appendix 3

Table 7.7
Fife comparison expenditure and turnover (in 2020 prices)

	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		978.0	1,060.9	1,128.8
Add:				
inflows from outside Fife	3%	27.4	29.7	31.6
Less: outflows	-30%	-296.2	-321.3	-341.9
Retained expenditure (turnover)		709.2	770.2	820.1

Note
Inflows and outflows from Appendix 3

Table 7.8
West Fife: comparison floorspace and turnover, 2021 (in 2020 prices)

	Floorspace sq m		Av. turnover	Turnover
	gross	net	ratio £/sq m	£million
Dunfermline Town Centre				
* Town Centre shops	26,060	16,939	8,249	139.7
*Tesco, Winterthur Lane (total 8,290 sq m gross-est 30% comp)	2,487	1,492	6,766	10.1
*ASDA Halbeath (total 9,540 + 1,162 mez) sq m gross- est 45% comp	4,816	2,890	5,863	16.9
ASDA St Leonards-total 4,749 sqm (25% comp)	1,187	712	5,863	4.2
Tesco Duloch-total 6,147 sq m (18% comp)+ ext 2,747 (78% comp)	3,249	1,949	6,766	13.2
Aldi Duloch (1606 sqm gross, 1,125 sqm net -est 20% comp)	321	225	7,563	1.7
Dobbies Garden Centre (5,310 sm total- est 60% comp)	3,186	2,549	1,231	3.1
Other Leisure Park (Ed.Wollen Mill. Garden Buildings Centre)	940	752	665	0.5
Aldi Halbeath Rd (13/03345-1,657 gross,1,158 net -includes extension- est 20% comp	331	232	7,563	1.8
Other Dunfermline shops	2,578	1,676	3,300	5.5
*Inverkeithing	1,100	715	3,300	2.4
*Kincardine	400	260	3,300	0.9
*Rest of Dalgety Bay	630	410	3,300	1.4
Aldi, Donibristle, Dalgety Bay - new (1,650 sq m gross, 1,125 net - est 20% comp)	330	225	7,563	1.7
ASDA Dalgety Bay (3,437 sq m gross 20% comp)	687	412	5,863	2.4
Culross/ Rosyth/Cairneyhill/Oakley/ Limekilns/Newmills	894	581	3,300	1.9
*Kelty	670	436	3,300	1.4
Sub total (excl Dunfermline TC)	23,808	15,515		69.1
Cowdenbeath Town Centre				
Lidl North End Park (1,794 sq m gross, 1,066 sq m net- est 20% comp.)	359	213	5,428	1.2
B&M North End Park (1,858 sq gross,1,674 sq m net- 75% comp)	1,394	1,256	3,952	5.0
*Rest of Town Centre	3,110	2,022	3,712	7.5
Sub total	4,862	3,490		13.6
Aldi, Cowdenbeath (14/00803-1,587 sq m gross, 1,140 sq m net, 296 net comp)	317	296	7,563	2.2
Retail Parks (see Appendix 4)				
Carnegie Retail Park, Dunfermline	7,846	6,277		14.5
Halbeath Retail Park, Dunfermline (excl ASDA)	11,190	8,694		35.2
Sub total	19,036	14,970		49.7
Other Retail Warehouses				
Bed Shed, Baldridgeburn, Dunfermline	1,110	888	2,140	1.9
Sterling Home Store, Dunfermline	2,500	2,000	2,750	5.5
Connections Furnishings, Comfort Store, Inverkeithing	450	360	2,140	0.8
Sub total	4,060	3,248		8.2
Total West Fife	**78,143**	**54,459**		**282.6**

Note
* Goad gross floorspace data 2021, provided by the Council.
Average comparison turnover ratios for named operators in retail parks, supermarkets and other named operators based on Retail Rankings 2021
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2017 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 35% for 2021, to allow for the general decline in shop numbers over the period.
A list of the occupiers in the retail parks in Fife is provided in Appendix 5, including turnover.
Turnover/floorspace ratio of Cowdenbeath TC assumed at 45% of Dunfermline TC turnover ratio, and small towns assumed at 40% of the Dunfermline TC ratio.

Table 7.9
Mid Fife: comparison floorspace and turnover, 2021 (in 2020 prices)

	Floorspace sq m		Av. turnover	Turnover
	gross	net	ratio £/sq m	£million
Kirkcaldy Town Centre				
Town Centre shops	26,610	17,297	5,881	101.7
Sub total	26,610	17,297		101.7
Lidl (new)-at Stagecoach depot site (relocation from Esplanade) 2,018 sq m gross, 1,410 sq m net 15% comp	303	212	5,428	1.1
Morrisons, Invertiel 6,369 sq m gross, 3,519 sq m net-704 sq m comp (20%)	1,274	704	6,405	4.5
ASDA, Kirkcaldy	4,756	2,564	5,863	15.0
11,889 sq m gross (Council)- 6,410 sq m net at 60:40 conv/ comp sales				
*Sainsbury's, Fife Central Retail Park (5,610 sq m gross- 15% comp)	842	505	4,974	2.5
Aldi, McKenzie St, Kirkcaldy (1,493 sq m gross total)- 20% comp	299	209	7,563	1.6
Aldi, Ferrard Rd, Kirkcaldy (Total 1606 sq m gross/ 1,125 net- est 20% comp)	321	225	7,563	1.7
Other Kirkcaldy shops (excl Fife Central RP)	5,021	3,264	2,941	9.6
*Lochgelly	3,390	2,204	2,941	6.5
*Burntisland	1,090	709	2,941	2.1
Sub total	16,992	10,382		43.5
Glenrothes Town Centre				
*Kingdom Centre shops	15,880	10,322	5,881	60.7
*Morrisons, Flemington Rd, Glenrothes (4,730 sq m gross-20% comp)	946	473	6,405	3.0
Lidl, Leslie Rd, Glenrothes (1,000 sq m gross-10% comp)	100	70	5,428	0.4
*Aldi, Flemington Rd, Glenrothes (1,300 sq m gross- est 20% comp)	260	182	7,563	1.4
*B&M, Flemington Rd, Glenrothes (1,500 sq m gross- 75% comp)	1,125	788	3,952	3.1
ASDA,Fullerton Rd, Glenrothes (Total 7,897 sq m gross- 3,554 sq m gross comp)	3,554	2,132	5,863	12.5
*Cadham Centre, Glenrothes	130	85	2,941	0.2
*Glenwood shops, Glenrothes	450	293	2,941	0.9
Other Glenrothes shops (notional estimate)	1,000	650	2,941	1.9
Falkland / Freuchie/ Ladybank/ Kingskettle/ L Links/Newburgh	1,526	992	2,941	2.9
Sub total	9,091	5,664		26.3
Leven Town Centre				
*Town Centre shops (excluding Riverside Retail Park)	5,600	3,640	4,117	15.0
*Lidl, Mitchell St, Leven (1,060 sq m gross-10% comp)	106	74	5,428	0.4
Aldi, Turpie Rd, Leven-1,480sqm gross, 990 sq m net- 20% comp	296	198	7,563	1.5
Methil (excl Riverside Furnishings)/Buckhaven	1,364	887	2,941	2.6
Leslie/ Markinch	2,240	1,456	2,941	4.3
Aberdour/Dysart/Cardenden/Kinghorn/Kinglassie/Thornton	1,793	1,166	2,941	3.4
Sub total	5,800	3,781		12.2
Retail Parks (see Appendix 6)				
Fife Central Retail Park, Kirkcaldy	19,990	15,294		67.0
Saltire Retail Park, Glenrothes	10,460	8,368		12.7
Riverside R P, Leven incl Home Bargains (less 25% of B&M and HB)	5,891	4,229		16.6
Sub total	36,341	27,890		96.3
Other Retail Warehouses				
Stocks Discount Warehouse, Kirkcaldy (carpets)	2,291	1,833	1,000	1.8
Sub total	2,291	1,833		1.8
Total Mid Fife	**118,906**	**81,020**		**358.8**

Note
* Goad gross floorspace data 2021, provided by the Council.
Average comparison turnover ratios for named operators in retail parks, supermarkets and other named operators based on Retail Rankings 2021
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2017 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 35% for 2021, to allow for the general decline in shop numbers over the period.
A list of the occupiers in the retail parks in Fife is provided in Appendix 5, including turnover.
Turnover/floorspace ratio of Glenrothes TC assumed as for Kirkcaldy TC, and Leven TC ratio assumed at 70% of this. Other towns at 50% of Kirkcaldy TC ratio.

Table 7.10
East Fife: comparison floorspace and turnover, 2021 (in 2020 prices)

	Floorspace sq m		Av. turnover	Turnover
	gross	net	ratio £/sq m	£million
St Andrews Town Centre				
*Town Centre shops	11,780	7,657	4,633	35.5
Aldi, Tom Stewart Lane, St Andrews (1,331 sq m gross-20% comp)	266	186	7,563	1.4
Other St Andrews shops	1,658	1,078	1,853	2.0
Sub total	1,924	1,264		3.4
Cupar Town Centre				
*Lidl (total 2,000 sq m gross) 20% comp	400	260	5,428	1.4
*Rest of Town Centre	9,160	5,954	2,780	16.6
Sub total	9,560	6,214		18.0
Tesco, Cupar (total 2,033 sq m gross/ 1,338 net-c30% comp- agent data)	610	401	6,766	2.7
Aldi, South Rd, Cupar (total 1,587 sq m gross- 20% comp)	317	222	7,563	1.7
*Anstruther	2,020	1,313	1,853	2.4
Crail / Pittenweem	1,461	949	1,853	1.8
Tayport/ Newport	670	435	1,853	0.8
Other East Fife	1,331	865	1,853	1.6
Sub total	6,408	4,186		11.0
Total East Fife	**29,672**	**19,321**		**67.8**

Note
* Goad gross floorspace data 2021, provided by the Council.
Average comparison turnover ratios for named operators in retail parks, supermarkets and other named operators based on Retail Rankings 2021
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2017 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 35% for 2021, to allow for the general decline in shop numbers over the period.

7.6.3 The floorspace information for small villages and other small shops in town suburbs still dates from Council surveys in 2007. We have allowed for a reduction in 35% of the floorspace from this historic data in 2021, assuming many small shops will have closed. In previous Capacity Studies a 30% reduction was assumed

7.6.4 Returning to our retail market commentary in section 4, Tables 7.8 to 7.10 reveal the stronger performance of Dunfermline relative to Kirkcaldy and Glenrothes in terms of the comparison turnover/floorspace ratios. The turnover/ floorspace ratios in St Andrews are considerably lower than shown in the 2020 Capacity Study as a consequence of the much-reduced estimate of visitor spending on comparison goods under STEAM.

7.7 Comparison planning consents & opportunities

7.7.1 Table 7.11 shows the current comparison retail planning consents and current retail planning applications in Fife and brief commentary is given in 4.2.4.

7.8 Edinburgh St James Quarter

7.8.1 In Edinburgh, the St James Quarter shopping centre opened in June 2021. It features a shopping galleria to accommodate 80 different retailers, a mix of restaurants, bars and a foodhall among other features. There are some empty units at present, but maybe scheduled for occupation soon. A luxury hotel- *The W Edinburgh* with a striking design is planned to open in winter 2022.

7.8.2 The development offers the opportunity to revitalise the City Centre retail sector by attracting shoppers in large numbers following the earlier stages of the pandemic. Nevertheless, the pandemic is very much still present. The St James Quarter will almost certainly attract more trade from Fife and beyond. The prospect of increased comparison expenditure leakage from Fife in the future appears a strong possibility in line with the national market trends outlined in section 3.

Table 7.11
Proposed comparison floorspace in Fife: consents and applications 2021 (in 2020 prices)

	Floorspace sq m gross	Floorspace sq m net	Turnover ratio £/sq m	Turnover £million
Planning consents included in the 2021 Capacity Study				
Yard Public House site, Admiralty Rd, Rosyth 17/01554/FULL not built Proposed Lidl supermarket- (total 2,367sq m gross. Conv 2,012 sq m and 355 sq m comp. To open in 2022 (Lidl website)	355	249	5,428	1.3
Halbeath Retail Park- extension 16/01927/FULL- subject to S75 agreement -not built Units 9 & 11- 4,532 sq m gross convenience floorspace - for:				
Lidl- (2,488 sqm gross total-20% comp)	498	348	5,428	1.9
Other proposed units are for bulky goods (5,435 sq m gross)	5,435	4,348	2,800	12.2
Section 42 application subitted to allow up to 50% of sales floorspace in units 1-4 to sell convenience goods 20/01189/FULL- pending consideration				
Dobbies, Dunfermline 19/01676/FULL Approved 30/07/2019 New extension 250 sq m gross, converted warehouse to retail 315 sq m Class 1 non-food. Also new warehouse 260 sq m not included here.	565	452	1,231	0.6
Dobbies Hillend IE Dalgety Bay 20/03217/FULL Approved 2021 B&M store: 2,508 sq m gross. 2,323 sq m net with 1,858 sq m comp and 465 sq m conv sales	2,006	1,858	3,952	7.3
Cadham Centre, Glenrothes 19/03203/FULL Approved 10/09/20 Two storey retail unit (Class 1) and offices. Retail Units 1 & 2 = total 133 sq m gross Estimate for comparison sales	133	93	3,100	0.3
Land to East of Durie St, Leven 20/00330/FULL Approved 21/08/2020 4 retail units Class 1 Total 360 sq m. Estimate 50% conv, 50% comp	180	126	3,100	0.4
South Road, Cupar 19/03537/FULL and 21/02199 (Latest development scheme)- under construction Floorspace from the latest planning application proposed block plan drawing- July 2021 All figurs sq m gross Total 7 units: 3,579 sq m gross. Unit 1 (2,138 sq m 70% comp- B&M let); Unit 2 (511 sq m); Unit 3 (372 sq m); Unit 4 (104 sq m); Unit 5 (175 sq m) Unit 6 (93 sq m); Unit 7 (186 sq m). Unit 3 let to Nimbus Beds. Unit 6 let to Baynes baker. Other units let to Costa, Burger King and Indigo Sun (non-retail) Comparison turnover estimates				
B&M at 70% comparison	1,497	1,048	3,952	4.1
Nimbus Beds	372	298	3,045	0.9
There are previous consents with variations 15/04418, 18/00978, 19/03530, 19/03532, 19/03535				
Current applications and Masterplan: not included in the 2021 Capacity Study				
Inglis St, Dunfermline 17/01812/FULL- demolition of tile warehouse and devt.-not built of 3 retail units. Total 1,289 sq m gross. Assume 432 sq m for conv. Other 2 units for comparison (432 sq m and 425 sq m). Consent extended to 7th April 2021 Consent for renewal: Application 21/02989 **invalid**.				
Freescale site (Shepherd Offshore), Dunfermline -16/03359/ARC Now scheduled for education development -Learning Campus with college buildings and two high schools. V minor retail component				
Craigtoun- St Andrews West SDA 15/01823/EIA Approved 08/10/19 Proposed expansion of St Andrews. It includes provision for commercial land uses which could include some retail. No details yet.				

Note
Gross floorspace from the Council. Estimated turnover of the consents are based on company averages from the 2021 Retail Rankings for named operators and a nominal turnover ratio applied to the other consents with no specified operator. Very minor retail consents have not been included.
Estimated turnover of the Craigtoun development proposal is not shown here because the details are yet to be finalised.

8 Comparison expenditure capacity

8.1 Introduction

8.1.1 As explained at the beginning of section 6, the planning context for defining spare capacity is the level of new retail development that can be accommodated without threatening the vitality and viability of established town centres. Spare retail capacity can exist in the following forms, as previously explained:

- Over-trading (not usually relevant for comparison retail capacity- see text below)
- Growth in retained expenditure (turnover)
- Potential to claw back expenditure leakage
- Potential to attract new trade into the area
- 'Acceptable' levels of impact- see section 6

8.1.2 A forecast range of estimated spare capacity is provided for comparison retail expenditure in this section, with a high and a low estimate for each of the three catchment areas to 2031.

8.2 Spare comparison expenditure capacity

8.2.1 Over/under-trading against average levels is less of an issue in comparison retailing because the sector is not dominated by a few major players, such as in the convenience sector.

8.2.2 Forecast growth in retained expenditure (turnover) in the retail catchment areas of West Fife and Mid Fife is substantial to 2031 (Tables 7.4 and 7.5), and it offers the principal source of spare capacity to support additional comparison retail floorspace. The forecast growth in turnover in East Fife is relatively modest because of the high outflows.

8.2.3 With increased concentration of multiple retailer demand and investment in the largest cities and malls in Scotland, the prospects of clawing back significant comparison expenditure leakage from Fife appear limited. Indeed, expenditure leakage could increase (see our comments on attraction to the Edinburgh St James Quarter in subsection 7.8).

8.2.4 The proportions of online retail expenditure now account for a very substantial proportion of comparison shopping expenditure. The proportions are forecast to increase, yet there is uncertainty over what the proportions will be in ten years' time. For these reasons we have chosen assumed variations in the proportions of internet spending to be the key variable defining our high and low estimates of forecast spare comparison expenditure capacity.

8.2.5 For the *high estimate*, the forecast expenditure growth alone is assumed, as there is little relevance in adding potential to claw back leakage when the prospects of achieving it at any significant level appear limited.

8.2.6 For the *low estimate*, a higher rate of growth in the proportion of SFT (mainly internet spending) has been assumed. All the evidence is that the proportion of internet retail spending increasing, especially following the impact of the pandemic and there is no reason to suppose why that direction will change over the next few years.

8.2.7 In the following tables on retail capacity, more weight should be given to the expenditure capacity figures than to the equivalent retail floorspace, because retailer performance and formats varies widely. In this report, town centre turnover/ floorspace ratios have been applied to estimate the equivalent floorspace. Where lower turnover/ floorspace ratios are applied, there would be more equivalent floorspace.

8.2.8 Forecasts beyond 2026 should be viewed with caution, because of the greater uncertainties.

8.3 Spare comparison expenditure capacity

8.3.1 **High estimates-** Tables 8.1 to 8.3 show the forecast spare comparison expenditure for each of the three retail catchment areas up to 2026 and 2031, after deducting turnover relating to existing planning consents. The broadly-estimated net floorspace equivalents relate to those in the main town centres in each retail catchment area.

Table 8.1
West Fife: forecast spare comparison expenditure capacity (in 2020 prices)

	2021-26 £million	2026-31 £million	2021-31 £million
High estimate			
(a) Growth in retained expenditure (turnover)- Table 7.4	24.5	19.9	44.4
(b) Less planning consents: - Table 7.11	-23.3		-23.3
High estimate (a+b)	**1.2**	**19.9**	**21.1**
Low estimate			
(a) Growth in retained expenditure (turnover)- Appendix 5	7.1	16.9	24.0
(b) Less planning consents: - Table 7.11	-23.3		-23.3
Low estimate (a+b)	**-16.2**	**16.9**	**0.7**
Equivalent comparison floorspace	£ per sq m	£ per sq m	
Turnover/ floorspace ratio- high	8,170	8,699	
Turnover/ floorspace ratio- low	8,370	8,858	
	sq m net	sq m net	sq m net
High	*100*	*2,300*	2,400
Low	*-1,900*	*1,900*	0

Note
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. *Figures are rounded.*
The turnover ratio derives from the current turnover ratio in Dunfermline TC £ 8,170
The ratio is increased to relate to 2026 and 2031, based on % turnover growth in Fife -Table 7.7 (high) and Appendix 5 (low)

Table 8.2
Mid Fife: forecast spare comparison expenditure capacity (in 2020 prices)

	2021-26 £million	2026-31 £million	2021-31 £million
High estimate			
(a) Growth in retained expenditure (turnover)- Table 7.5	31.9	26.1	58.0
(b) Less planning consents: - Table 7.11	-0.7		-0.7
High estimate (a+b)	**31.2**	**26.1**	**57.3**
Low estimate			
(a) Growth in retained expenditure (turnover)- Appendix 5	9.8	22.2	31.9
(b) Less planning consents: - Table 7.11	-0.7		-0.7
Low estimate (a+b)	**9.1**	**22.2**	**31.3**
Equivalent comparison floorspace	£ per sq m	£ per sq m	
Turnover/ floorspace ratio- high	6,387	6,801	
Turnover/ floorspace ratio- low	6,025	6,376	
	sq m net	sq m net	sq m net
High	*4,900*	*3,800*	8,700
Low	*1,500*	*3,500*	5,000

Note
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. *Figures are rounded.*
The turnover ratio derives from the current turnover ratio in Kirkcaldy TC £ 5,881
The ratio is increased to relate to 2026 and 2031, based on % turnover growth in Fife -Table 7.7 (high) and Appendix 5 (low)

Table 8.3
East Fife: forecast spare comparison expenditure capacity (in 2020 prices)

	2021-26 £million	2026-31 £million	2021-31 £million
High estimate			
(a) Growth in retained expenditure (turnover)- Table 7.6	4.6	3.9	8.5
(b) Less planning consents: - Table 7.11	-5.0		-5.0
High estimate (a+b)	**-0.4**	**3.9**	**3.5**
Low estimate			
(a) Growth in retained expenditure (turnover)- Appendix 5	0.5	3.2	3.8
(b) Less planning consents: - Table 7.11	-5.0		-5.0
Low estimate (a+b)	**-4.5**	**3.2**	**-1.3**
Equivalent comparison floorspace	£ per sq m	£ per sq m	
Turnover/ floorspace ratio- high	5,032	5,358	
Turnover/ floorspace ratio- low	4,746	5,023	
	sq m net	sq m net	sq m net
High	*-100*	*700*	600
Low	*-1,000*	*600*	-400

Note
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. *Figures are rounded.*
* The turnover ratio derives from the current turnover ratio in St Andrews TC £ 4,633
The ratio is increased to relate to 2026 and 2031, based on % turnover growth in Fife -Table 7.7 (high) and Appendix 5 (low)

8.3.2 In West Fife, the forecast spare capacity up to 2031 at the high end of the range is up just over £21 million, with equivalent retail floorspace of 2,400 sq m net. Most of the forecast spare capacity relates to the period 2026-31 because existing planning consents would take up the capacity to 2026.

8.3.3 In Mid Fife, the forecast spare capacity is just over £57 million by 2031 at the high end, with an equivalent retail floorspace of 8,900 sq m net (the applied turnover/ floorspace ratio is lower than that for West Fife). The forecast spare capacity is more evenly spread between the years compared to the forecast for West Fife because there are limited planning consents.

8.3.4 In East Fife, the forecast spare capacity at the high end is £3.5 million by 2031, with equivalent retail floorspace of 600 sq m net. It is much less than the high estimate in the 2020 Capacity Study, mainly because of the reduced level of estimated visitor spending.

8.3.5 **Low estimates-** the forecast spare comparison capacity at the low end of the range is based on Tables A, B and F in Appendix 5.

8.3.6 In Table A, the higher level of SFT (mainly internet expenditure) has been raised to 37% in 2026 instead of 33.2% in the high estimate. By 2030, it is raised to 40%.

8.3.7 Under the low estimates, the forecast spare capacity in West Fife would be only £0.7 million by 2031. In Mid Fife, it would be £31.3 million and in East Fife it would be -£1.3 million by 2030 (negative capacity).

8.4 Interpretation

8.4.1 As stated earlier in this report, forecast retail capacity is a broad-brush exercise. New retail developments will also be partly serviced by trade diversion from existing stores and centres, which is a factor not included in retail capacity studies generally.

8.4.2 Furthermore, the high proportions of online comparison expenditure in recent years add complexity, as some new retail developments could divert trade back to retail floorspace that might otherwise remain online. In our view, that prospect is unlikely to be of sufficient importance to undermine the basic estimated percentage of internet spending as a guide to what expenditure is available (after it is deducted) to service retail floorspace in capacity studies.

8.4.3 In West Fife, the forecast spare comparison expenditure would support low/moderate levels of new retail development up to 2031 (over and above existing consents). If potential trade diversion from existing retail floorspace to new proposals in the future is considered, the level would be higher than in Table 8.1

8.4.4 In Mid Fife, the forecast spare capacity could support substantial additional comparison retail floorspace up to 2031.

8.4.5 In East Fife, the forecast spare comparison expenditure capacity is limited up to 2031 but could support minor levels of additional comparison floorspace over and above existing consents.

9 Summary

9.1 Population change

9.1.1 There is a projected minor decrease in the Council area population of -1,198 from 2021 to 2031 (-0.3%), with a forecast population of 370,658 for Fife by 2031.

9.2 Updates since 2020

9.2.1 The retail expenditure data, visitor expenditure data, retailer average turnover data, retail floorspace in Fife, retail market data and the list of retail planning consents have all been updated for 2021.

9.3 Retail trends

9.3.1 The pandemic has accelerated trends in the retail sector of which the following are identified:

- Concentration of retail investment into dominant centres
- Growth in online shopping
- Diversification away from shopping
- Lifestyle changes influencing shopping patterns

9.3.2 Traditional town centres have lost market share, the number of vacant units has risen. Half of Scotland's department stores have closed. Online shopping has shifted a large part of the market from physical shopping to technology and logistics. Budget retailers have done well. Market adjustment will take a number of years, as vacancies rise

9.3.3 Town centres which offer essential local uses and / or high quality shopping and associated visitor experience are likely to fare best. Others are likely to require ongoing restructuring into the medium term.

9.3.4 Forecast growth in convenience expenditure in the UK over the next few years is minimal and low for comparison expenditure compared to growth rates in the past. The supermarket/ discounter sector is now fairly saturated with stores. In the comparison sector, growth in online shopping is reducing the requirements for new floorspace generally.

9.3.5 Although the severe restrictions on the public during last year have been substantially removed, the pandemic is still present and some restrictions are reappearing, which is especially ominous for the hospitality sector.

9.4 Fife retail market

9.4.1 Development of retail planning consents in Fife has generally been slow, accompanied by scheme revisions and delays.

9.4.2 The number of occupied retail units in the main town centres in Fife has decreased since 2018 and the number of vacant units has mostly increased. There is a downward pressure on Zone A retail rents.

9.4.3 The retail market remains subdued with evidence that the pandemic is set to continue. There have been signs of encouraging market activity in Fife, but it is quite limited.

9.5 Forecast convenience retail capacity to 2031

9.5.1 The 2021 Capacity Study shows that Fife is well-provided with supermarkets and discount foodstores. While there is no forecast spare convenience capacity in each of the three catchment areas up to 2031, (especially in West Fife), it does not mean no new development beyond the existing consents, just not very much.

9.5.2 Consideration of additional new store development proposed in the future would be more an issue of improved quality and choice, rather than meeting a deficiency in convenience floorspace as such

9.6 Forecast comparison retail capacity to 2031

9.6.1 In West Fife, the forecast spare comparison expenditure would support low/moderate levels of new retail development up to 2031 (over and above existing consents)- up to some £21 million. If potential trade diversion from existing retail floorspace to new proposals in the future is considered, the level would be higher.

9.6.2 In Mid Fife, the forecast spare capacity could support substantial additional comparison retail floorspace up to 2031- up to some £57 million expenditure.

9.6.3 In East Fife, the forecast spare comparison expenditure capacity is limited up to 2031 (up to £3.5 million expenditure) but could support minor levels of additional comparison floorspace over and above existing consents.

Appendix 1

Fife retail catchment areas- population forecasts

Fife retail catchment area population projections for the Fife Retail Capacity Study 2021					
Retail catchment area	Census 2011	Mid-year 2020	2021	2026	2031
West Fife	123,608	129,402	128,615	128,567	128,201
Mid Fife	181,860	182,936	181,824	181,756	181,238
East Fife	59,730	61,792	61,416	61,393	61,219
Total Fife	**365,198**	**374,130**	**371,856**	**371,717**	**370,658**

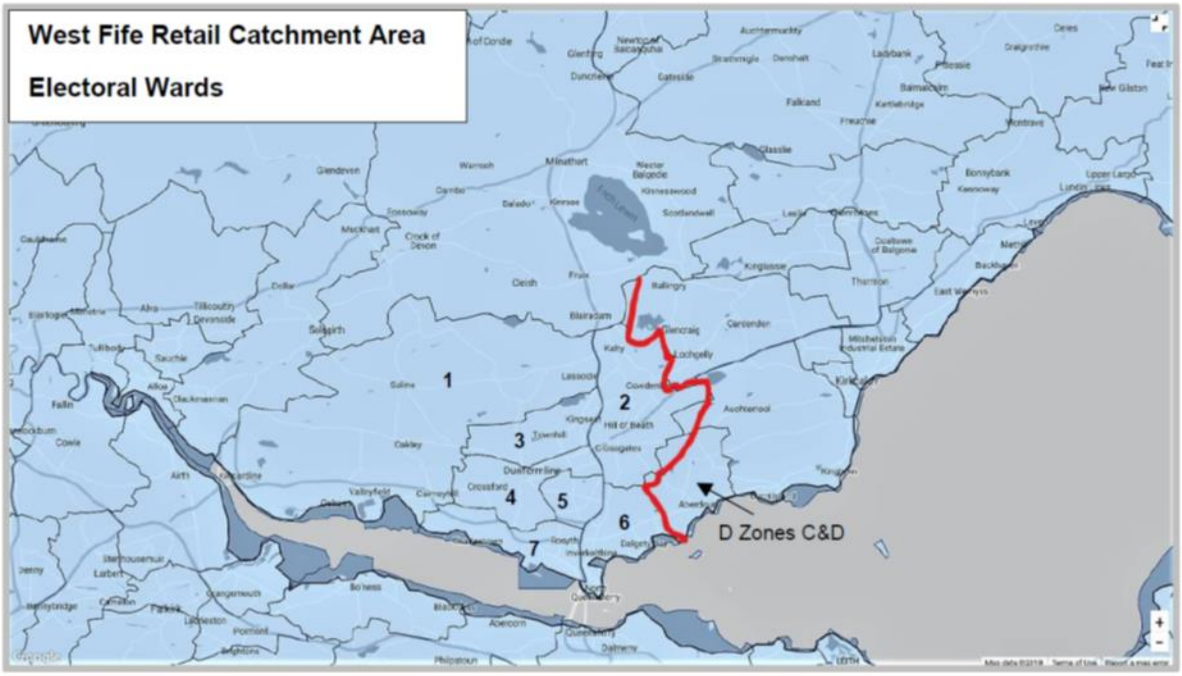
Note
The 2011 data is taken directly from the 2011 Census, Scotland, based on postcode sector population data for each catchment.
The 2020 Mid-year data is from National Records Scotland (NRS) online based on electoral wards and data zones comprising each catchment.
Data for 2021, 2026 & 2031 derives from the NRS 2018-based population projections for the Fife Council area, apportioned to the three catchment areas from the 2020 Mid-year data.

NRS Mid-year population estimates 2020

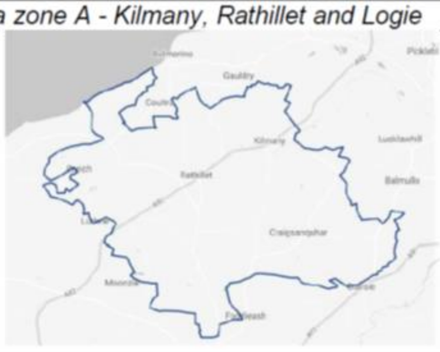
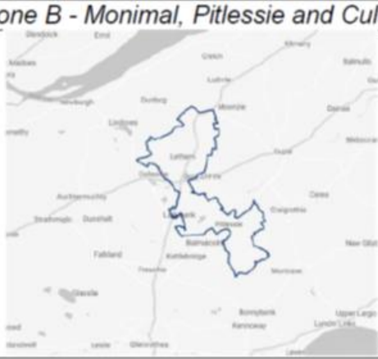
	Population
East Fife	
Tay Bridgehead ward	15,846
Howe of Fife and Tay Coast ward- part	
Data zone- Kilmany, Rathillet and Logie	565
St Andrews ward	19,756
Cupar ward	14,321
less: Data zone Monimal,Pitlessie and Cults	-953
East Neuk and Landward	12,257
Total	**61,792**

West Fife	
1 West Fife and Coastal Villages ward	15,853
2 Cowdenbeath ward	22,409
3 Dunfermline North ward	17,410
4 Dunfermline Central ward	18,646
5 Dunfermline South ward	23,887
6 Inverkeithing and Dalgety Bay ward	17,445
less: Data zone St Colme & Aberdour West	-1,149
less: Data zone Aberdour	-930
7 Rosyth ward	15,831
Total	**129,402**
Mid Fife (by deduction from Fife total)	**182,936**
Fife	**374,130**

The groups of electoral wards and data zones represent areas of ‘best fit’ with the original catchment boundaries based on postcode sectors. Population data for postcode sectors is 2011 based, therefore less up to date compared to the mid-year 2020 data.



Data zone C - Aberdour	Data zone D - St Colme & Aberdour West
	

Data zone A - Kilmany, Rathillet and Logie	Data zone B - Monimal, Pitlessie and Cults
	

Appendix 2

Convenience expenditure inflows and outflows, including visitor spending

Table A
Convenience expenditure inflows

	West Fife	Mid Fife	East Fife		
Residents' expenditure potential	£ million	£ million	£ million		
by catchment area 2021	293.1	427.7	136.5		
	Origin- inflows from:			Total inflow	
	West Fife	Mid Fife	East Fife	From rest of Fife	*Visitor spend
Destination				£ million	£ million
West Fife		8%	0%	33.9	4.2
Mid Fife	4%		10%	24.0	4.1
East Fife	0%	3%		11.7	6.4
Total				69.65	14.7

Note
*Based on catchment residents' expenditure in 2021 multiplied by % visitor spend shown at bottom of Table C

Table B
Convenience expenditure outflows 2021

	Origin			
	West Fife	**Mid Fife**	**East Fife**	**Total Fife**
Retained expenditure by catchment	92%	87%	73%	94%
Total outflows	8%	13%	27%	6%
Outflows to centres outside Fife	5%	2%	17%	

Table C
Visitor retail expenditure: STEAM report for Fife and District areas- 2019

Study area 'Districts' in the above report					
	Dunfermline	Kirkcaldy	St Andrews	NE Fife	Fife
Visitor expenditure (direct spend)	District	District	District	District	Total
	£million	£million	£million	£million	£million
*** Convenience -including VAT**	**4.2**	**4.1**	**3.5**	**3.0**	**14.7**
Comparison- excluding VAT (STEAM)	6.52	6.33	5.34	4.63	22.82
Comparison- including VAT	**7.8**	**7.6**	**6.4**	**5.6**	**27.4**

In the STEAM report, NE Fife includes Cupar and the rest of East Fife, excluding St Andrews

Assumed for the 3 Catchment Areas in the Fife Retail Capacity Study in 2021

	West Fife	**Mid Fife**	**East Fife**
	£million	£million	£million
Total visitor retail expenditure	12.0	11.7	18.4
*Convenience 35% (estimate)	**4.2**	**4.1**	**6.4**
Comparison 65% (from STEAM data)	**7.8**	**7.6**	**12.0**

Note:
In the STEAM report, the 'Shopping' category just includes comparison goods expenditure by visitors. There is no separate data
for convenience expenditure, as it is included within the much wider 'Food and Drink category', which embraces restraurants, cafes, pubs, take-aways etc.
* We estimate that the total retail expenditure comprises 35% convenience and 65% comparison expenditure.

Appendix 3

Comparison expenditure inflows and outflows, including visitor spending

Table D **Comparison expenditure inflows**					
Residents' expenditure potential by catchment area 2021	**West Fife** £ million 337.7	**Mid Fife** £ million 479.3	**East Fife** £ million 160.9		
	Origin- inflows from:			Total inflow	
Destination	West Fife	Mid Fife	East Fife	From rest of Fife £ million	*Visitor spend £ million
West Fife		10%	1%	49.8	7.8
Mid Fife	7%		10%	41.9	7.6
East Fife	0%	1%		6.9	12.0
Total				98.56	27.4

Note

*Based on catchment residents' expenditure in 2020 multiplied by % visitor spend shown at bottom of Table C

Table E **Comparison expenditure outflows**				
		Origin		
	West Fife	**Mid Fife**	**East Fife**	**Total Fife**
Retained expenditure by catchment	67%	65%	30%	60%
Total outflows	33%	35%	70%	40%
Outflows to centres outside Fife	26%	24%	58%	30%

Copied from Appendix 2

Table C **Visitor retail expenditure: STEAM report for Fife and District areas- 2019**					
Study area 'Districts' in the above report					
Visitor expenditure (direct spend)	Dunfermline District £million	Kirkcaldy District £million	St Andrews District £million	NE Fife District £million	Fife Total £million
*** Convenience -including VAT**	**4.2**	**4.1**	**3.5**	**3.0**	**14.7**
Comparison- excluding VAT (STEAM)	6.52	6.33	5.34	4.63	22.82
Comparison- including VAT	**7.8**	**7.6**	**6.4**	**5.6**	**27.4**
In the STEAM report, NE Fife includes Cupar and the rest of East Fife, excluding St Andrews					
Assumed for the 3 Catchment Areas in the Fife Retail Capacity Study in 2021					
	West Fife £million	**Mid Fife** £million	**East Fife** £million		
Total visitor retail expenditure	12.0	11.7	18.4		
*Convenience 35% (estimate)	**4.2**	**4.1**	**6.4**		
Comparison 65% (from STEAM data)	**7.8**	**7.6**	**12.0**		

Note:

In the STEAM report, the 'Shopping' category just includes comparison goods expenditure by visitors. There is no separate data for convenience expenditure, as it is included within the much wider 'Food and Drink category', which embraces restraurants, cafes, pubs, take-aways etc.

* We estimate that the total retail expenditure comprises 35% convenience and 65% comparison expenditure.

Appendix 4

Retail Parks in Fife- list of retailers

West Fife- Retail Parks: floorspace and turnover, 2021 (in 2020 prices)

	Floorspace sq m		Turnover	Turnover
	gross	net	ratio £/sq m	£million
***Carnegie Retail Park**				
B & Q	3,480	2,784	1,787	5.0
Home Bargains (1,010 sq gross- 60% comp)	606	485	5,300	2.6
Pagazzi Lighting	730	584	2,600	1.5
Farmfoods (convenience)				
Dreams	1,030	824	2,427	2.0
Matalan	2,000	1,600	2,159	3.5
Pure Gym (780 sq m gross)				
Total	7,846	6,277		14.5
***Halbeath Retail Park**				
Argos	470	118	18,229	2.1
Carphone Warehouse	580	464	12,964	6.0
Pets at Home	2,890	2,312	3,337	7.7
Timpson/ Max Spielman	440	352	389	0.14
Currys & PC World	580	464	12,964	6.0
Carpetright	970	776	1,314	1.0
B&M	1,800	1,440	3,952	5.7
Homebase	1,730	1,384	1,297	5.6
Tapi Carpets & Floors	1,730	1,384	650	0.9
Halfords (non-retail)- 460sq m gross				
Total	11,190	8,694		35.2
Other retail warehouses				
Bed Shed, Baldrigeburn	1,110	888	2,140	1.9
Sterling Home Store	2,500	2,000	2,750	5.5
Connections Furnishings, Comfort Store, Inverkeithing	450	360	1,400	0.5
Total	4,060	3,248		7.9
Total West Fife	**23,096**	**18,218**		**57.6**

Sources:

* Goad 2021, where indicated. Othewise, Council data

Company average turnover ratios applied, based on Retail Rankings 2021, adjusted to include VAT

Mid Fife- Retail Parks: floorspace and turnover, 2021 (in 2020 prices)

	Floorspace sq m		Turnover	Turnover
	gross	net	ratio £/sq m	£million
***Saltire Retail Park, Glenrothes**				
Matalan	3,160	2,528	2,159	5.5
Poundstretcher	2,420	1,936	620	1.2
Homebase	3,420	2,736	1,297	3.5
Carpetright	880	704	1,314	0.9
The Pet Hut	580	464	3,337	1.5
Bensons (recently closed and vacant)				
Total	10,460	8,368		12.7
***Fife Central Retail Park, Kirkcaldy**				
Carphone Warehouse	430	344	12,964	4.5
Currys & PC World	1,040	832	12,964	10.8
Bensons	780	624	3,045	1.9
Next	1,280	1,024	4,297	4.4
Next Home	360	288	4,297	1.2
Boots	1,160	928	3,448	3.2
Pets at Home	940	752	3,337	2.5
Harveys & Reid	750	600	3,045	1.8
B&Q	4,930	3,944	1,787	7.0
EE	150	120	4,848	0.6
Argos	1,270	318	18,229	5.8
Tapi Carpets & Floors	1,300	1,040	865	0.9
ScS	1,470	1,176	2,722	3.2
Sofology	1,160	928	5,819	5.4
Dreams	660	528	3,788	2.0
Wren Kitchens	1,360	1,088	8,088	8.8
B&M	950	760	3,952	3.0
Halfords (non-retail)- 1,030 sq m gross				
Total	19,990	15,294		67.0
***Riverside Retail Park, Leven**				
B&M, Riverside RP (1,500 sq m gross- 75% comp)	1,125	900	3,952	3.6
Argos	880	220	18,229	4.0
Home Bargains, Riv. Rd (2060 sq m gross- 60% comp)	1,236	989	5,300	5.2
B&Q	2,650	2,120	1,787	3.8
Total	5,891	4,229		16.6
Other retail warehouses				
*B&M, Flemington Rd, Glenrothes (1,500 sq m gross- 75% comp)	1,125	900	3,952	3.6
Stocks Discount, Kirkcaldy- carpets	2,291	1,833	1,400	2.6
Total	3,416	2,733		6.1
Total in Kirkcaldy Catchment	**39,757**	**30,623**		**102.4**

Sources:

* Goad 2021, where indicated. Othewise, Council data

Company average turnover ratios applied, based on Retail Rankings 2021, adjusted to include VAT

Appendix 5

Low comparison expenditure forecast

Table A **Fife comparison expenditure per capita per annum (in 2020 prices)** **(low forecast)**			
Catchment areas	2021 £	2026 £	2031 £
West Fife	3,938	4,286	4,774
Mid Fife	3,936	4,293	4,790
East Fife	3,909	4,182	4,610
**excluding special forms of trading*			
West Fife	*2,634*	*2,700*	*2,864*
Mid Fife	*2,632*	*2,705*	*2,874*
East Fife	*2,614*	*2,635*	*2,766*

Note - Source- *Precisely*

Original expenditure per capita data in the top three rows provided by Precisely in their GeoInsight report 2021 for this study is in 2020 prices.

Growth rate per annum		2021-26	2026-31
	West Fife	1.71%	2.18%
	Mid Fife	1.75%	2.22%
	East Fife	1.36%	1.97%

*The proportion of spending relating to Special Forms of Trading (SFT) requires to be deducted from data, so that it relates to retail floorspace.
Most SFT comprises internet spending. Precisely publishes estimates of the proportions of SFT for the UK.
The proportions in Precisely's Retail Expenditure Product Guide 2021/22, Table 3.4 are:

	2021	2026	2031
	-36.8%	-36.9%	-40.0%

Precisely also advise that not all the forecast allowance for SFT should be deducted from expenditure, as there is some overlap between non-store based sales and store-related internet sales. They say that the extent of the overlap is unknown. For this study, we estimate a 10% reduction in Precisely's proportions to acknowledge the issue. This is applied for 2021, 2026 and 2031
For the low forecast, the estimated proportions of SFT are more than applied to the low forecast- (R MacLean estimate)

	2021	2026	2031
Deductions for SFT applied in this study	**-33.1%**	**-37.0%**	**-40.0%**

Table B **Fife residents' comparison expenditure potential - low forecast (in 2020 prices)** ***Excluding SFT (special forms of trading)***					
Catchment areas	2021 £ million	*growth* *2021-26* *£ million*	2026 £ million	growth *2026-31* *£ million*	2031 £ million
West Fife	337.7	*8.4*	346.2	*20.2*	366.4
Mid Fife	479.3	*13.0*	492.4	*29.6*	522.0
East Fife	160.9	*1.2*	162.1	*7.7*	169.8
Total Fife	978.0	*22.7*	1,000.7	*57.5*	1,058.2

Note
From Table 1.1 and Table A. Figures are rounded.

Table F1 **West Fife comparison expenditure and turnover (in 2020 prices)**				
	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		337.7	346.2	366.4
Add: inflows from rest of Fife	15%	49.8	51.0	54.0
inflows from outside Fife	2%	7.8	8.0	8.5
Less: outflows	-33%	-112.8	-115.6	-122.3
Retained expenditure (turnover)		282.6	289.6	306.5
Note Inflows and outflows from Appendix 3				

Table F2 **Mid Fife comparison expenditure and turnover (in 2020 prices)**				
	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		479.3	492.4	522.0
Add: inflows from rest of Fife	9%	41.9	43.1	45.7
inflows from outside Fife	2%	7.6	7.8	8.3
Less: outflows	-35%	-170.1	-174.8	-185.3
Retained expenditure (turnover)		358.8	368.5	390.7
Note Inflows and outflows from Appendix 3				

Table F3 **East Fife comparison expenditure and turnover (in 2020 prices)**				
	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		160.9	162.1	169.8
Add: inflows from rest of Fife	4%	6.9	6.9	7.2
inflows from outside Fife	7%	12.0	12.1	12.6
Less: outflows	-70%	-111.9	-112.8	-118.1
Retained expenditure (turnover)		67.8	68.4	71.6
Note Inflows and outflows from Appendix 3				

Table F4 **Fife comparison expenditure and turnover (in 2020 prices)**				
	%	2021 £million	2026 £million	2031 £million
Main catchment residents' expenditure potential		978.0	1,000.7	1,058.2
Add:				
inflows from outside Fife	3%	27.4	28.0	29.6
Less: outflows	-30%	-296.2	-303.1	-320.5
Retained expenditure (turnover)		709.2	726.5	768.8
Note Inflows and outflows from Appendix 3				