

Fife Council



Fife Retail Capacity Study 2020

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In association with Ryden

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Appendix 1 Fife retail catchment areas- population forecasts

Appendix 2 Convenience expenditure inflows and outflows, including visitor spending

Appendix 3 Comparison expenditure inflows and outflows, including visitor spending

Appendix 4 Retail Parks in Fife- list of retailers

Appendix 5 Low comparison expenditure forecast

1 Introduction and catchment areas

1.1 Scope

1.1.1 The Fife Retail Capacity Study 2020 is the latest in the series of annual retail capacity studies produced by consultants for Fife Council. These follow a similar format, with updates to the retail capacity forecasts every year and updates on retail market conditions every second year. The 2020 Study includes 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 2020 contains the following updates:

- Retail capacity forecasts for 2020-25, 2025-30 and combined for 2020-30 for convenience and comparison expenditure
- All values in constant 2019 prices (previously 2018 prices)
- Projected population for the updated periods, based on the National Records Scotland (NRS) 2019 mid-year estimates and the 2018 based projections
- Retail expenditure forecasts to match the updated periods, commissioned from Precisely (formerly Pitney Bowes)
- **Note-** at the time of writing, updated retail floorspace information in Fife for 2020 had *not* been provided by Experian Goad, **so the 2019 Goad data has been applied.** New store completions in 2020 are included and closures deducted from the 2019 data where known.
- Updated average company turnover ratios based on the 2020 Retail Rankings
- Updated list of major retail planning consents and commitments for 2020

1.2.2 It is not considered that there is any need to adjust the physical shopping patterns from the NEMS surveys in 2016 for the 2020

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 the retail market demand in Fife;
- Relating to the above, commentary on the effects of Covid 19 on the retail sector
- Broad overview of the general quality of the retail offer in the main towns;
- Interpretation of the overall 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 2020 Study, the catchment area populations are now based on the NRS 2019 mid-year populations for the electoral wards and data zones comprising each area. The projections to 2030 are based on the 2018 based NRS population projections for Fife. 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 decrease in the Council area population of -940 from 2020 to 2030 (-0.2%), with a forecast population of 370,942 for Fife by 2030. These projections are significantly *lower* than the superseded 2016 based NRS projections applied in the 2019 Capacity Study, where the population was projected to grow to 378,885 by 2029.

Table 1.1
Fife retail catchment area population projections for the Fife Retail Capacity Study 2020

Retail catchment area	Census 2011	Mid-year 2019	2020	2025	2030
West Fife	123,608	128,806	128,231	128,202	127,907
Mid Fife	181,860	182,913	182,096	182,056	181,636
East Fife	59,730	61,831	61,555	61,541	61,399
Total Fife	365,198	373,550	371,882	371,799	370,942

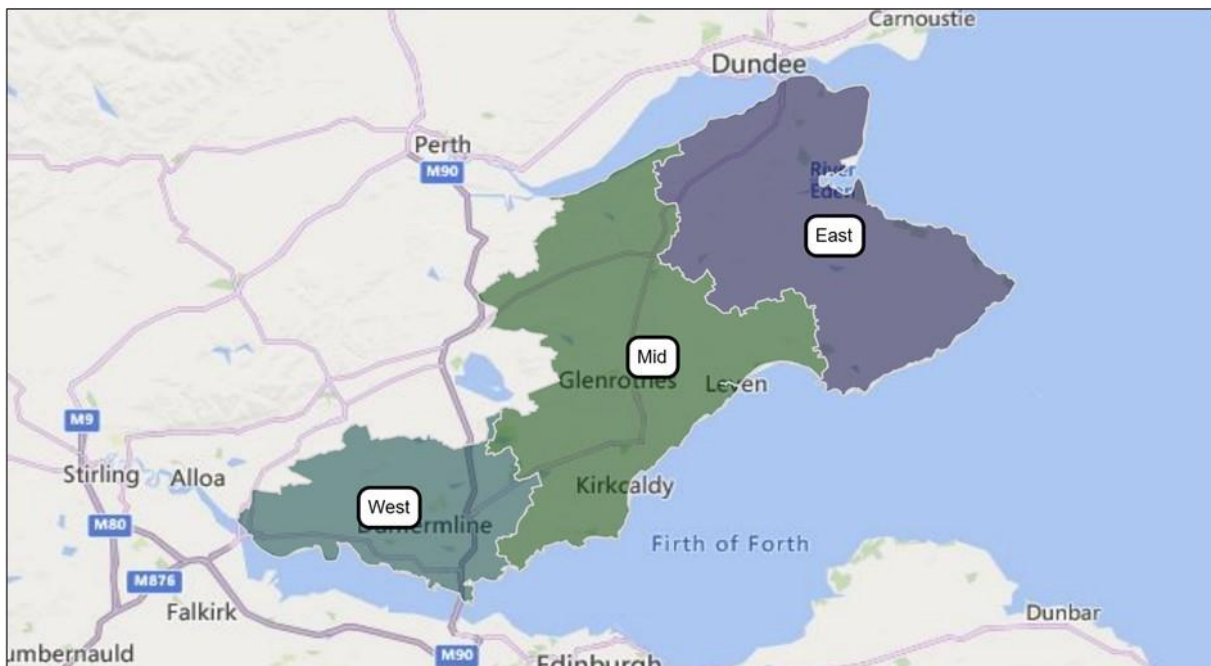
Note

The 2011 data is taken directly from the 2011 Census, Scotland, based on postcode sector population data for each catchment.

The 2019 Mid-year data is from National Records Scotland (NRS) online based on electoral wards and data zones comprising each catchment.

Data for 2020, 2025 & 2030 derives from the NRS 2018-based population projections for the Fife Council area, apportioned to the three catchment areas from the 2019 Mid-year data. See Appendix 1

Map 1.1 Fife Retail Catchment Areas 2020



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 a few changes. These relate to paragraphs 28,29,30,32,33 and 125.

2.2.10 Under *Policy Principles and Development Planning* there is now a presumption in favour of sustainable development, whereas before it was just a presumption in favour of development that contributes to sustainable development.

2.2.11 Under *Development Management*, proposals that do not accord with the development plan should not be considered acceptable unless material considerations indicate otherwise. Where a proposal is for sustainable development, this is a material consideration. The changes appear more emphatic than the original version.

2.3 National Planning Framework

2.3.1 In November 2020, the Scottish Government published the 4th National Planning Framework *Position Statement*. The document sets out ideas and lines of thinking following consultations in course of preparation of the next NPF.

2.3.2 On page 2, there is reference to strengthening support for development in town centres and restricting out of town retail and leisure. The aim is to reduce car-dependent developments and encourage use of public transport, cycling and walking generally.

2.3.3 On Spatial Strategy (page 31), there is a sub section on how planning policies can promote 're-imaging' of city and town centres to respond to current and future challenges. In relation to the 2020 Capacity Study, this requires policies to address the changing patterns of retailing on town centres in section 3 of the Study. It also requires future policies to support town centres following the continuing ravages of Covid 19 where the impact on shops and the hospitality sectors remains drastic.

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.

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.

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.

- Fife Central Retail Park
- Saltire Retail Park

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

3 National trends in retailing

3.1 Introduction

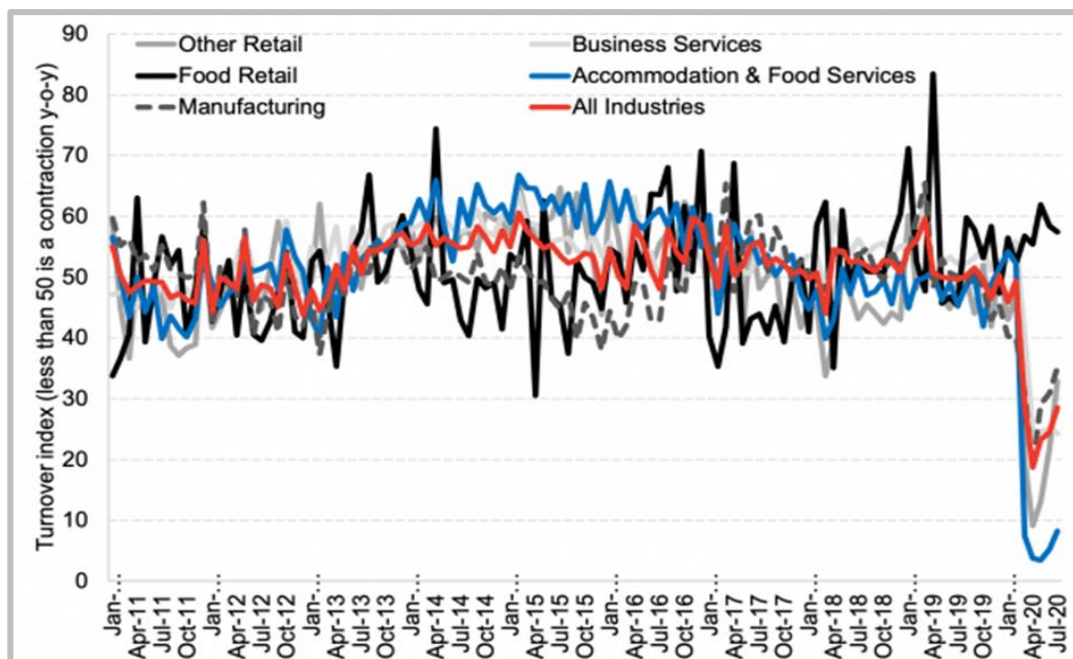
3.1.1 This section considers some of the national trends driving activity in the UK and Scottish retail and leisure sectors. It provides a high-level context for local market trends and projections for Fife, later in the report. The main feature of 2020 is the impact of Covid 19 on the economy and its indefinite continuation, which makes for uncertain forecasts all round. The Capacity Study looks up to ten years ahead and adopts a positive outcome that there will be a recovery.

3.2 National trends in retail expenditure and turnover

3.2.1 The Scottish Government has released figures which show that the economy contracted by 19.4% during April to June 2020, coinciding with the previous peaks in the virus. The services sector, which includes retailing and leisure among others, contracted by 18.4%.

3.2.2 The Scottish Government publish a monthly business turnover index by sector and the graph in Figure 3.1 shows the changes from June 2011 to July 2020. Turnover in July this year was lower than in July 2019. The only exception was food retailing which increased. Non-food retail turnover plummeted. Sources: *Scottish Government and Fraser of Allander Institute.*

Figure 3.1 Business turnover index by sector



3.3 Retail Sales in Scotland

3.3.1 Much of this year has been dominated by the effects of lockdowns and measures such as social distancing and mask-wearing to reduce the impact of Covid19. In the Scottish Retail Monitor, KPMG and the Scottish Retail Consortium report that, despite the decline of over 18% in retail sales year on year to June 2020, Scotland’s retail sector is on the

slow road to recovery. On a like for like basis, the decline in retail sales was 14% compared to June 2019. From the Retail Monitor, food sales grew by 4%, but online-adjusted non-food sales declined by 19.4%, despite a marked improvement over the 33% decline recorded in May 2020.

3.3.2 Categories including technology, sports equipment, toys and DIY made gains. Other categories, especially clothing retailers, have suffered badly during and following the initial total lockdown.

3.3.3 The easing of lockdown in the summer did not fully kick-start the retail sector and there is a possibility of more restrictions which will affect retail sales.

3.4 UK total household expenditure

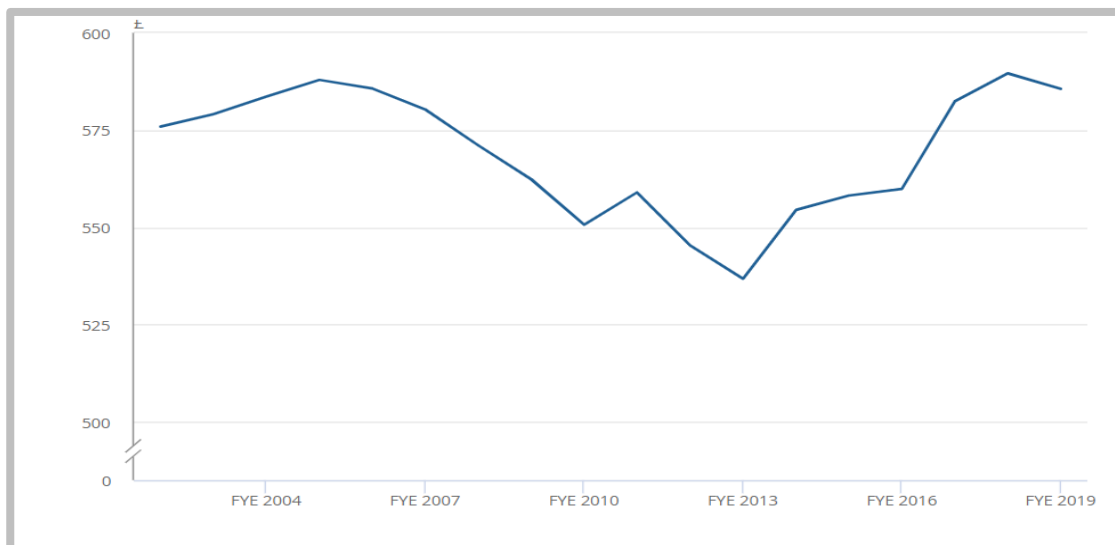
3.4.1 Figure 3.2 shows UK household weekly average weekly spending from 2002-2019. The chart shows that spending has stagnated since 2017. UK average weekly expenditure per household was £585 in 2018/19. The three- year average for the years ending 2017/19 was £572 for the UK and £508 for Scotland. (Source ONS).

3.5 Forecast retail expenditure trends

3.5.1 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.

3.5.2 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 mostly negative for each of the three Fife catchment areas from 2020-25, and less than 1% per annum from 2025-30. So, the case for more convenience floorspace is mostly about improved choice.

Figure 3.2 Total household weekly spending 2002-2019 (in 2019 prices) ONS



3.5.3 Expenditure per capita on comparison goods is at a low point just now because of the pandemic but is forecast to recover and rise by nearly 6% per annum in Fife to 2025. Thereafter it is forecast to rise at a slower rate of around 2% per annum from 2025-30. A substantial part of the forecast increase in comparison expenditure will be online shopping, leaving a reduced amount to service shop floorspace.

3.6 Market trends

3.6.1 The retail sector is complex and dynamic. There are major, secular trends driving the sector.

3.6.2 **Concentration in dominant centres-** long run evidence shows consumers willing to travel for an increasing range of goods and services. Retailers, leisure operators and

service providers are investing in those dominant centres, and disinvesting from many other medium and small centres.

3.6.3 To meet these markets, developers and investors in turn focus on centres where they can anticipate that these national occupiers are likely to take high value and often larger premises. Edinburgh and Glasgow are among those dominant centres, which include not only major city centres but also regional malls and major retail parks. Our consultations with the Scottish Retail Consortium (SRC) suggest that shoppers will probably return to the *major* centres at pre-Covid levels eventually.

3.6.4 These market trends are manifesting themselves in continuing closures of chain outlets across Scotland, whether through administration, company voluntary agreements (CVAs) with landlords to reduce floorspace and costs, or closing outlets at lease breaks or expiries. Department and variety stores have struggled. Mothercare closed its last stores in 2020. The House of Fraser went into administration in 2018 and it is now owned by Sports Direct but said to be struggling. Debenhams has been in administration, but now set to close. Also, most recently, the Arcadia Group has gone into administration.

3.6.5 There has been a steady pruning of branch networks extends across many retailers and formats as well as services such as traditional pubs and banks. Examples of other retailers going into administration in 2020, (but mostly still trading) include The Edinburgh Woolen Mill and Ponden, M&Co., DW Sports, Harvey's Furniture, Benson Beds, Oak Furnitureland, Monsoon Accessorise, Quiz, Oasis and Warehouse, among many others.

3.6.6 There are high costs in running stores with burdens and risks associated with lease periods against the background of increasing online shopping. One of the effects of online shopping is that there is less requirement for traditional retail floorspace except for markets where the merchandise is targeted, such as distinctive goods and those aimed at visitors for example. The major property investment company Intu, owner of major shopping malls, went into administration in June 2020.

3.6.7 In town centres, the effect of this trend, in combination with increasing online retailing, is to put pressure on the viability of some high street retailers. Town centres which offer high quality shopping and associated visitor experience are likely to continue to thrive. Examples include the prosperous small towns of St Andrews, North Berwick, and Peebles to mention a few

3.6.8 For others (the majority), especially those with limited distinctive offer, the future is less certain. High streets are taking a battering. Mid-size towns like Dunfermline, Kirkcaldy and Glenrothes fall into that category. There will probably be less shops in the future as the public choose to visit fewer centres for shopping.

3.6.9 **Online shopping-** includes both online-only and click-and-collect, or delivery). The process is exacerbating the costs and market concentration challenges facing some retailers. Online shopping for groceries is estimated to account for about 17% of sales (online only and click and collect/ delivery).

3.6.10 For non-food shopping, the proportion is estimated to be around 35% (before allowing for the overlap between non store sales and store-related internet sales (Precisely). However, it could be closer to 40% of non-food sales (SRC), depending on the sources. During the lock down, internet sales were estimated at around 70% of non-food sales, but this has fallen back. The proportion of internet spending is forecast to continue to increase. Covid 19 has accelerated the change in shopping habits to much more extensive use of the internet compared to previous levels.

3.6.11 Multi-channel retailing (meaning both in store and internet) is becoming increasingly sophisticated and retailers need to carefully manage their sales information and target the most profitable sectors. The best retailers are often very online-specific in terms of targeting their offer. Online grocery operations generally must be large scale and efficient to be profitable. A noticeable new entrant is Amazon. For independent retailers in small towns, the market lesson is that development of internet based sales is becoming essential for survival.

3.6.12 Much of the service sector, such as banks, estate agents and travel agents have rationalized their services to be orientated online, which means that they are unlikely to reappear in small towns in the future.

3.6.13 **Diversification away from shopping-** in part this is a response to the above two challenges. It is also a trend as landlords and developers seek alternative sources of revenue and footfall through introducing leisure (cafes, bars, restaurants, cinemas), then other active uses such as hotels, offices and potentially residential uses. For example, Drive Thru fast food and coffee is now common and popular with the public who want to refreshments on the go. Before the pandemic, hot food outlets such as Greggs, McDonalds and KFC, and cafes such as Tim Horton and Costa, were expanding. Whether this trend will continue post Covid is uncertain. Diversification is also evident within superstores where service uses are offered within the units.

3.6.14 There are examples of diversifications among small retailers, such as provision of cafes within shops and retail art galleries. Achievement of a complementary mix of retail and services within small town centres is more relevant.

3.6.15 **Lifestyle changes-** the recent move towards much more working from home driven by Covid 19 is a major change and much of it will probably remain. Before the pandemic, people were switching towards shopping for groceries and some comparison shopping more locally than before. Small store formats have proved popular, such as Tesco Express and Sainsbury's Local. Co-op stores have also proved important in this shift, particularly in small towns.

3.6.16 Examples of thriving retailers include the expansion of discount foodstores such as Lidl and Aldi and budget mixed goods retailers such as B&M and Home Bargains in suburban locations and in small towns all over the country. These types of store are part of the 'value retailing' sector, which has become especially important. More households have limited budgets, because of furloughing and higher unemployment. Other successes in the value retail sector include TK Maxx and Primark. Otherwise, the clothing sector has

experienced great difficulties, especially with some major retailers failing to correctly read fashion trends and demands.

3.6.17 The restaurant, cafes and beverage market sectors have probably peaked, and all have been very severely affected by restrictions relating to Covid. When the crisis ends, a return to popularity can be expected, as the virus has revealed just how important these are to support contentment in society. However, a cycle of lockdowns extending into the future is a possibility until vaccines are found. That scenario would pose a major threat to the hospitality sector. Recent news announcements indicate that a successful vaccine has just emerged, so there is more reason to be optimistic.

3.6.18 The increased local focus is supported by the growth of cycling and public transport, although the latter has been severely affected by Covid. Reduced commuting creates more opportunities for local retailers. Ever-increasing traffic congestion in major cities is also an incentive creating opportunities for more local shopping in suburbs and small towns. However, cars remain the dominant form of transport for visits to supermarkets and to major shopping malls for substantial purchasing trips.

3.7 Impending uncertainties

3.7.1 Two matters deserve reference but are not part of the Capacity Study. The UK has now left the EU after a last-minute deal in December. There will probably be continuing disruption to the availability of goods and services as the markets adjust to the new relationship, which includes some formidable administrative challenges.

3.7.2 The other matter is the uncertainty surrounding the issue of Scottish independence, where polls indicate growing support since 2014. This could also generate further changes to the markets by investors, suppliers, and retailers, depending on the outcome.

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 broad 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 Assessment 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 also exposed to the channeling of most investment into major cities such as Edinburgh, as mentioned in the previous section.

4.2.2 Fife's large town centres face a continuing competitive challenge to retain their retail and service mix and maintain their market positions. In the absence of retail floorspace data from Experian for 2020, there is no up to date information on vacancy rates in Fife. In the past, the vacancy rates were mostly higher than the Scottish average, apart from St Andrews.

4.2.3 The Scottish vacancy rate in high streets was 12.4%, and 12.9% across all centres in March 2020 taking account of vacancy levels in shopping malls 15.6% and 9.4% in retail parks (source: SRC and Local Data Company).

4.2.4 On convenience shopping, the market interest in Fife is mainly on the development of additional discount foodstores,

as shown in the list of planning consents in Table 5.11. Development of planning consents has been slow, accompanied by scheme revisions and delays.

4.2.5 There is also interest in securing a higher proportion of convenience floorspace in retail parks by seeking variations to existing consents. In line with national trends, there is no evidence of market interest in developing more traditional mid-size supermarkets and superstores.

4.2.6 On comparison retailing, development of planning consents has been slow, accompanied by scheme revisions and delays, as in the convenience sector. There has been little in the way of new comparison floorspace development over the past year.

4.3 Retailer requirements

4.3.1 Owing to the market turmoil caused by Covid 19, there are no published lists of retailer demand for units by geographic area, such as those available past years. Some retailers do have specific requirements which they are progressing, but they are just not reported on a published list.

4.4 Retail rents

4.4.1 Table 4.1 shows the achieved average Zone A retail rents in the main town centres in Fife, for 2020. Comparison with rents in 2018 is shown. Apart from Cowdenbeath, recorded rents are lower compared to 2018. Caution should be applied though, because the records relate to specific properties, which may not represent the wider levels of rents in the town centres. However, as the recorded rents are mostly lower than the past, it is probable that this is the actual case.

4.4.2 St Andrews has among the highest retail rents, which is reflected by its prosperity, visitor spending and the high turnover/floorspace ratios for its size, as shown in Tables 5.10 and 7.10.

4.4.3 Retail rents in Dunfermline town centre are holding-up as the second highest, but down from 2018. There have been several store closures, as identified later in this section.

Most of its stronger performance relates to the Kingsgate Centre. The rents in Kirkcaldy and Glenrothes town centres are lower. The position relative to Dunfermline is consistent with the

corresponding lower turnover/ floorspace ratios compared to Dunfermline, as indicated in Tables 7.8 and 7.9.

Table 4.1
Zone A retail rents in the main town centres in Fife, 2020

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

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

4.5 West Fife- market activity and demand

4.5.1 **Dunfermline town centre-** there has been market activity in the Kingsgate Shopping Centre. New shops have been opened by The Wee Tea Company, Subway (relocation from Douglas Street) and a unit is currently being fitted out by B & M. However, Bonmarche, H & M and DW Sports all closed stores and the units are now vacant. Ramsay Travel also closed in the Kingsgate and but opened on Douglas Street (in the former Subway unit).

4.5.2 On Dunfermline High Street, Bob & Berts' café, Dears Pharmacy (no 85), Everyday Loans (57-59) and Blue Tattoo Box (no 5) all opened new outlets. H Samuel jewellers closed in summer 2020 and Andrew Thompson electrical / furniture store is closing.

4.5.3 Dunfermline town centre has a good range of independent outlets. Recent store openings include Dollbox /The Beauty Lounge at Maygate, Ramsay Travel opened on Douglas Street and Well Pharmacy relocated on Douglas Street. Stores were opened by Klozet fashion on Pilmuir Street and Barber Station on Bruce Street. Closures include Serpentus Exotics and Maggies Farm on New Row and Williamson Design florist on Douglas Street.

4.5.4 The leisure sector has been active in the town centre. New restaurants and cafes include: the Kinema buffet restaurant and Koko Sushi on Carnegie Drive, Jack O'Bryans on Chalmers Street, Juniper Wine Café on New Row, and Delicious café opened (and closed) on Guildhall Street with Old Town Café now open in its place. Reubens deli/cafe on the New Row closed. The City Hotel Group has plans to turn the former post office on Queen Anne Street into a 180-seat restaurant with garden courtyard area.

4.5.5 The town centre will be boosted by the development of The Linen Quarter at the former Pilmuir Works, bringing premium new-build residential.

4.5.6 **Carnegie Retail Park** contains a mix of retailers which complement the town centre (see Appendix 4). No activity has taken place recently and one unit remains available. At Inglis Street, beside the retail park, there is a consent extended to April 2021 to demolish the former Tile Warehouse and replace it with three retail units (see Table 7.11).

4.5.7 **Halbeath Retail Park** has a good mix of retailers (see Appendix 4). It has consent for an extension, including provision for bulky goods and convenience retailing, including Lid and possibly an M&S Simply Food store- see Table 5.11. The consent has not yet been developed and there is an application to

introduce flexibility in the sales floorspace in terms of convenience/ comparison goods.

4.5.8 The former Harveys furniture/Bensons for Beds unit has closed and is vacant. The Thomson's World of Furniture store on Kingseat Road, beside Halbeath Retail Park, has recently become a Sterling Home store. Opposite here, on Halbeath's Main Street, development has just begun on three retail units, a café/ restaurant and two drive thrus, where Costa coffee and Burger King will open.

4.5.9 **Fife Leisure Park-** there have been no openings, however Bella Italia and Chiquito restaurants both closed, and the former Eastern Buffet remains vacant.

4.5.10 **Cowdenbeath** is a smaller centre where the retail offer has been greatly improved by development of a Lidl store and a B&M store at North End Park in 2019. Cowdenbeath is close to Dunfermline and residents have easy access to the range of stores there.

4.5.11 On High Street, Fife Laundry Services (dry cleaners) opened in the former Pressed for Time unit, other new stores include First Foot podiatrist, Subway and Ruby's Bits n Bobs pet products. Greggs the baker has closed, and the Cancer Research charity shop will not re-open after Covid closure.

4.6 Mid Fife- market activity and demand

4.6.1 **Kirkcaldy town centre** continues to suffer the effects of three large store closures. The town centre is linear and too long for most shoppers to trail from on end to the other. It also has too many shop units, including many of which are less than ideal for modern retailer requirements. There is nothing distinctive in the retail offer, which makes it vulnerable to the retail market trends described in section 3.

4.6.2 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.

4.6.3 More recent closures include Debenhams, Quiz clothing, HM Samuel jeweller, Clarks shoes, Carlton Bakeries, The

Money Shop, Folk Love restaurant and Ladbrokes. Burtons and Dorothy Perkins is due to close but Amber Tavers has plans to convert into a bar.

4.6.4 Market activity in the town centre has mainly come from independent and specialist retailers. There have been new openings on the High Street with The Works (no 122-126), Bob & Berts' café (no 157-159), VIP electronic cigarettes (the Mercat), and a concessions store is due to open in the former Debenhams unit including a café. Independent retailers investing in the town centre include Skynails (no 134), C Sinclair Fishmonger (no 174) Kerry Photography (no 243) and Strange Ray Vintage fashion (no 305).

4.6.5 Elsewhere in the town centre, Pommy's World Buffet restaurant opened on the Esplanade in the Spring of 2020, WR&P on Kirk Wynd and Amy King Bridal on Tolbooth Street. At the east end in the Merchants Quarter a new hub for independent businesses known as Enlightenments, House of Adam Smith has opened. The current occupiers include 3 Beans Coffee Co and some artisan craft vendors.

4.6.6 Plans for residential development in the redevelopment of the site of the former Co-op and demolition of the vacant Reid Furniture shop at the east end of the High Street will remove surplus retail space from the town centre.

4.6.7 The 80,620 sq.ft. Postings Shopping Centre was sold by Columbia Threadneedle at the start of 2019 to Evergold Property has been re-branded *The Kirkcaldy Centre*. Only a handful of tenants are currently in occupation and the landlord is considering options.

4.6.8 A planning application was submitted in November 2017 by Lasalle Investment Management, owners of the Mercat Shopping Centre for a cinema, leisure and food and drink/public house use on the site of the swimming pool which has been demolished. The application was approved (with conditions) in March 2020.

4.6.9 A revised application has been submitted for relocation of the Lidl supermarket on the Esplanade to the former Stagecoach depot site (see Table 5.11).

4.6.10 **Fife Central Retail Park** is the largest retail park in Fife, with a wide range of retailers (see Appendix 4). It has performed well and attracted continuing investment. There has been limited activity over the past year, though. The 'One Below' bargain store has closed. DW Sports shop and Frankie and Benny's restaurant closed during 2020 and both remain vacant.

4.6.11 Premier Inn received planning permission in 2016 for a 60-bedroom hotel with restaurant adjacent to the retail park at John Smith Business Park, however development has been not progressed.

4.6.12 **Glenrothes-** the Kingdom Centre mall appears well maintained and clean, but the property is rather from a past era. The former Dunnes store remain vacant. The retail offer is generally rather undistinctive, which makes it vulnerable to the retail market trends described in section 3. It would greatly benefit from further investment, but the challenge is high under the retail market trends described in this study.

4.6.13 The former Co-op department store was due to be demolished. However, this has been put on hold. New stores were opened by Toytown, One Below bargain store (in the former Poundworld unit) and Home DIY. The following stores have closed: Clarks shoe shop, Carphone Warehouse, HM Samuel, and it is understood Argos is potentially not re-opening following lock-down.

4.6.14 Easy Living Developments' £10 million Henge Retail Park, on the site of the CISWO club on North Street in Glenrothes, opened at the end of 2018- see Table 5.11. It is anchored by Food Warehouse (by Iceland) and Marks & Spencer Foodhall, with an Indigo Sun tanning salon. KFC and Tony Macaroni withdrew from the development. Units 2 & 3 which have class 3 restaurant consent are available. Two drive thru restaurants are proposed neighbouring this retail park, one of which will be a Starbucks coffee shop.

4.6.15 **Saltire Park-** the list of retailers is in Appendix 4. The Pet Hut, American Golf both opened here during summer 2018 while Bensons for beds has closed. One of the former retail units has been converted into a trampoline centre.

4.6.16 **Leven-** Store openings include Pixel Planet gaming store and Loved By Bridget gift shop, while Carlton Bakeries has closed. The future of Peacocks store in the town is understood to be at risk. There is planning consent for four retail units (Class 1) east of Durie Street and adjacent to the Lidl foodstore - see Table 5.11.

4.6.17 **Riverside Retail Park-** the list of retailers is in Appendix 4. A Starbucks drive thru coffee shop has just received planning permission here and a McDonalds drive thru restaurant opened opposite Sainsbury's on Riverside Road in 2019.

4.7 East Fife- market activity and demand

4.7.1 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.

4.7.2 **St Andrews-** has many shop units with quality multiple retailers in small units which is unusual, plus high-quality independent shops. The retail offer is probably the consequence of being an affluent University town, together with being a destination for tourists and golfers. Visitor spending in St Andrews is relatively high (see Appendix 2).

4.7.3 New stores were opened by clothing brand Seasalt, Highland Soap Company and Mountain Warehouse on Market Street. Closures on Market Street include Reiths menswear, Burns sweet Shop, Carphone Warehouse, while New Look closed but was replaced by Taste of Scotland.

4.7.4 On Bell Street Mac Cosmetics opened in the former Bobbi Brown cosmetics store, Hays Travel took over the Thomas Cook unit, while Jack Wills and Ladybirds florist closed. Weft Studio textiles opened, and Short Stay St Andrews opened a holiday letting business on South Street, while The Junor Gallery and Thistle Dae gift shop have closed, and Artery gift shop relocated.

4.7.5 New food and beverage openings include BrewDog St Andrews in the former Nardini's ice cream parlour and breakfast/brunch/lunch outlet Next Door. Contemporary seafood restaurant and takeaway Harbour opened on Alexandra Place.

Meanwhile St Andrews Waffle Company has closed, and the future of Zizzi is uncertain.

4.7.6 **Cupar-** is a local service centre for shopping. The small town has a moderately affluent catchment, which is not close to any large centre,

4.7.7 New stores on Bonnygate in Cupar include Candy & Crunch dessert shop, Anthony Nails, The Bubble Bar (in the former Munch unit), Interiors at Forty Four opened (former Debra charity Shop), Enlighten health & wellbeing social enterprise, while Kingdom Health Clinic moved from Bonnygate to shared premises. Hardware business R Dott Thomson has been taken over and rebranded as Cupar Hardware Store. On Crossgate, Lloyds Pharmacy relocated to larger premises, Specsavers opticians and Number 10 bar

restaurant opened, while Rhubarb gifts and Print Stationery closed.

4.7.8 At South Road, Cupar, there has been a succession of alternative planning consents for a mixed retail development by London & Scottish Developments. The latest version was approved in September 2020 for Class 1 retail including take-away (Class 3 and Sui Generis)- see Tables 5.11 and 7.11. It includes seven retail units with a total of 3,815 sq m gross. It is understood that largest unit (2,136 sq m) has been pre-let to B&M, plus agreed pre-lets with Indigo Sun, Burger King, and coffee chain Costa.

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 of the three retail catchment areas and for Fife, taking account of the convenience shopping patterns identified by the 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* (formerly Pitney Bowes) Retail Expenditure Guide 2020/21, 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 2020-25 are minimal or negative as shown in the table, before deducting special forms of trading. The growth rates per annum pick up for 2025-30 but are still low. The expenditure per capita data is lower than in the 2019 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 2030. It should be noted that the proportions of SFT shown in this table are mostly non-store sales and the proportions are low, but more than in the 2019 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 lower than those in the 2019 Capacity Study, because of lower population forecasts and lower expenditure per capita.

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 2019 prices)			
Catchment areas	2020 £	2025 £	2030 £
West Fife	2,280	2,277	2,356
Mid Fife	2,366	2,372	2,461
East Fife	2,158	2,122	2,168
<i>*excluding special forms of trading</i>			
West Fife	2,139	2,129	2,193
Mid Fife	2,219	2,218	2,291
East Fife	2,024	1,984	2,018
Note (Pitney Bowes is now <i>Precisely</i>)			
Original expenditure per capita data in the top three rows provided by Precisely in their Geolnsight report 2020 for this study is in 2019 prices			
Growth rate per annum		2020-25	2025-30
	West Fife	-0.03%	0.68%
	Mid Fife	0.05%	0.74%
	East Fife	-0.34%	0.43%
*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 2020/21- Table 3.5			
Deductions for SFT	-6.2%	-6.5%	-6.9%

Table 5.2					
Fife residents' convenience expenditure potential (in 2019 prices)					
<i>Excluding SFT (special forms of trading)</i>					
Catchment areas	2020 £ million	<i>growth</i> 2020-25 £ million	2025 £ million	<i>growth</i> 2025-30 £ million	2030 £ million
West Fife	274.2	-1.3	272.9	7.6	280.6
Mid Fife	404.1	-0.4	403.8	12.4	416.2
East Fife	124.6	-2.5	122.1	1.8	123.9
Total Fife	803.0	-4.2	798.8	21.8	820.6
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-** in 2019, the Council commissioned a study entitled *The Economic Impact of Tourism in Fife & Districts* by Destination Research Consultants. This information is applied to the current 2020 Retail Capacity Study to derive estimates of convenience and comparison expenditure by visitors to the three Fife catchment areas. It updates research applied in previous versions- see Appendix 2.

5.5.4 **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 2020, 2025 and 2030. These are lower compared to the 2019 Capacity Study.

5.6 Convenience floorspace and turnover 2020

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 2019*. At the time of writing, Experian had been unable to provide the Council with floorspace data for 2020. 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 2020 are applied to the main supermarkets and discount foodstores, with adjustments to include VAT and remove petrol/ non-retail sales, expressed in 2019 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 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.

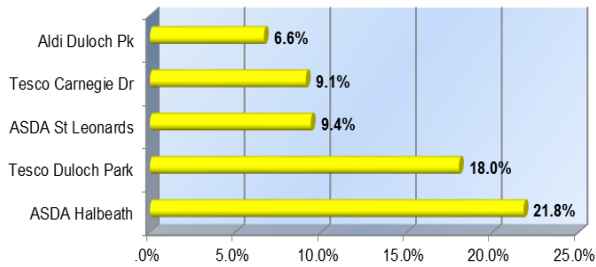
5.6.4 Comparison with the survey-based totals (actual turnover) is included for each area. This reveals significant under-trading in West Fife, slight under-trading in Mid Fife and minimal under-trading at below average levels in East Fife.

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.

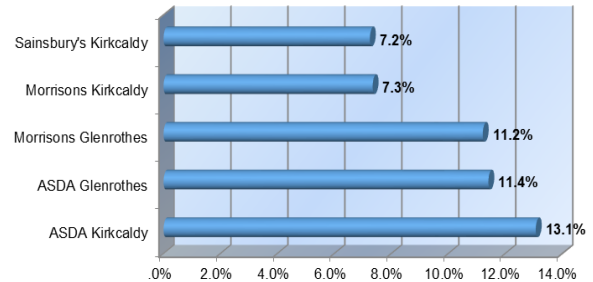
Figure 5.1 Main food shopping patterns- most frequently visited stores (household survey)

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

West Fife: most frequently visited stores for main food shopping by catchment residents



Mid Fife: most frequently visited stores for main food shopping by catchment residents



East Fife: most frequently visited stores for main food shopping by catchment residents

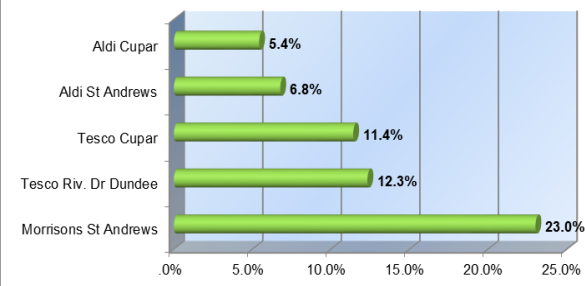


Table 5.4 West Fife convenience expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		274.2	272.9	280.6
Add: inflows from rest of Fife	12%	32.0	31.8	32.7
inflows from outside Fife	4%	12.2	12.1	12.5
Less: outflows	-8%	-23.1	-23.0	-23.6
Retained expenditure (turnover)		295.3	293.9	302.1
Note				
Inflows and outflows from Appendix 2				

Table 5.5 Mid Fife convenience expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		404.1	403.8	416.2
Add: inflows from rest of Fife	5%	22.2	22.2	22.8
inflows from outside Fife	3%	12.4	12.4	12.8
Less: outflows	-13%	-52.4	-52.3	-53.9
Retained expenditure (turnover)		386.3	386.0	397.8
Note				
Inflows and outflows from Appendix 2				

Table 5.6 East Fife convenience expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		124.6	122.1	123.9
Add: inflows from rest of Fife	9%	11.1	10.9	11.0
inflows from outside Fife	23%	28.3	27.8	28.2
Less: outflows	-27%	-33.8	-33.1	-33.6
Retained expenditure (turnover)		130.2	127.6	129.5
Note				
Inflows and outflows from Appendix 2				

Table 5.7 Fife convenience expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Council area residents' expenditure potential		803.0	798.8	820.6
Add:				
inflows from outside Fife	7%	52.9	52.6	54.1
Less: outflows	-6%	-44.5	-44.3	-45.5
Retained expenditure (turnover)		811.9	807.5	829.5
Note				
Inflows and outflows from Appendix 2				

Table 5.8 West Fife: convenience floorspace and turnover, 2020 (in 2019 prices)				
	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
Dunfermline Town Centre				
*Marks & Spencer Foodhall	510	332	10,188	3.4
*Rest of Town Centre	3,010	1,957	5,800	11.3
Sub total	3,520	2,288		14.7
*Tesco, Winterthur Lane (total 8,000 sq m gross-est 70% conv)	5,600	3,360	12,357	41.5
*ASDA Halbeath (total 9,540 goad + 1,162 mez) sq m gross- est 55% conv	5,886	3,532	14,721	52.0
ASDA St Leonards-total 4,749 sqm (75% conv)	3,562	2,137	14,721	31.5
Tesco Duloch-total 6,147 sq m (82% conv)+ ext 2,747 (22%conv)	5,645	3,387	12,357	41.9
Aldi Duloch (06/01592- floorplan 1,606 sqm gross, 1,125 net -est 80% conv)	1,285	900	13,962	12.6
Dobbies Garden Centre- Farm food hall (estimate)	400	360	8,500	3.1
Tesco Express, Aberdour Rd	326	245	16,750	4.1
Aldi Halbeath Rd (13/03345-1,657 gross,1,158 net -includes extension- est 80% conv)	1,340	926	13,962	12.9
Iceland, Halbeath Rd	800	560	7,741	4.3
*Farmfoods, Carnegie Retail Park	750	525	5,882	3.1
*Home Bargains, Carnegie RP (1,010 sq gross- 25% conv)	253	202	8,250	1.7
Other Dunfermline shops	3,009	1,956	3,770	7.4
Co-op, Linburn Rd, Dunfermline	319	191	9,767	1.9
Rosyth	1,322	859	3,770	3.2
Tesco, Rosyth	1,609	965	12,357	11.9
Sainsbury's Local, Camdean, Rosyth	350	263	16,320	4.3
*Inverkeithing	1,100	715	3,770	2.7
Crossgates	566	368	3,770	1.4
*Kincardine	330	215	3,770	0.8
*Tesco Metro, Dalgety Bay	1,840	1,288	12,357	15.9
Aldi, Donibristle, Dalgety Bay - new (1,650 sq m gross, 1,125 net - est 80% conv)	1,320	900	13,962	12.6
*Rest of Dalgety Bay	160	104	3,770	0.4
ASDA Dalgety Bay (3,437 sq m gross 80% conv)	2,750	1,650	14,721	24.3
Oakley, Saline, Torryburn, H Valleyfield, Crossford,				
Comrie, Cairneyhill, Charleston, Inverkeithing Mini Market 120sqm, plus few others	1,838	1,195	3,770	4.5
Sub total	42,358	26,801		299.8
Cowdenbeath Town Centre				
*Morrisons	2,110	1,055	12,810	13.5
Lidl North End Park (1,794 sq m gross, 1,066 sq m net- est 85% conv.)	1,525	906	11,292	10.2
B&M North End Park (1,858 sq gross,1,674 sq m net- 25% conv)	465	419	3,911	1.6
*Rest of Town Centre	2,770	1,801	4,060	7.3
Sub total	6,869	4,180		32.7
Aldi, Cowdenbeath (14/00803-1,587 sq m gross, 1,140 sq m net, 844 net conv)	1,174	844	13,962	11.8
*Kelty	390	254	3,770	1.0
Total West Fife turnover at average levels				360.0
<i>Under- trading below average levels</i>	<i>-18%</i>			<i>-64.7</i>
Total West Fife	54,311	34,367		295.3
Note				
* Goad gross floorspace data 2019, assumed for 2020, provided by the Council.				
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2019 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 30% for 2019, to allow for the general decline in shop numbers over the period. Average supermarket turnover ratios based on the Retail Ranking 2020 and other Mintel research on supermarket operator floorspace, adjusted to remove petrol sales, plus an allowance for VAT added- in 2019 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, 2020 (in 2019 prices)				
	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
Kirkcaldy Town Centre				
Lidl (1,286 sq m gross & 966 sq m net of which 847 sq net is conv)- see Table 2.11	1,093	847	11,292	9.6
*Rest of Town Centre	3,410	2,217	5,800	12.9
Sub total	4,503	3,064		22.4
Morrison's, Inveriel				
6,369 sq m gross, 3,519 sq m net-2,815 sq m conv (80%)	5,095	2,815	12,810	36.1
ASDA, Kirkcaldy	7,133	3,846	14,721	56.6
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	13,017	37.2
*M&S Simply Food, Fife Central RP	1,020	714	10,188	7.3
Greggs, Fife Central Retail Park	200	130	4,100	0.5
Aldi, McKenzie St, Kirkcaldy (1,493 sq m gross total)- 80% conv	1,194	836	13,962	11.7
Aldi, Ferrard Rd, Kirkcaldy				
(Total 1606 sq m gross/ 1,125 net- est 80% conv)	1,285	900	13,962	12.6
Other Kirkcaldy shops				
Dysart	309	201	3,770	0.8
Coaltown of Wemyss	37	24	3,770	0.1
Ballingry	738	480	3,770	1.8
*Lochgelly	1,570	1,021	3,770	3.8
Lochore	467	303	3,770	1.1
Cardenden	1,772	1,152	3,770	4.3
*Burntisland	1,480	962	3,770	3.6
Kinghorn & Aberdour	664	431	3,770	1.6
Sub total	32,051	19,483		189.8
Glenrothes Town Centre				
*Kingdom Centre	3,110	2,022	5,800	11.7
M&S Simply Food, Unit 1, North Street 15/03140/PPP & 16/02458/ARC	1,172	820	10,188	8.4
Food Warehouse, Unit 5, North Street (plan application as above)	960	672	7,741	5.2
Sub total	5,242	3,514		25.3
*Morrison's, Flemington Rd, Glenrothes (4,850 sq m gross-80% conv)				
Lidl, Leslie Rd, Glenrothes (1,000 sq m gross-90%conv)	900	675	11,292	7.6
*Aldi, Flemington Rd, Glenrothes (1,300 sq m gross- est 80% conv)	1,040	728	13,962	10.2
*B&M, Flemington Rd, Glenrothes (1,500 sq m gross- 25% conv)	375	300	3,911	1.2
ASDA, Fullerton Rd, Glenrothes				
(Total 7,897 sq m gross- 4,343 sq m gross conv)	4,343	2,606	14,721	38.4
*Cadham Centre, Glenrothes				
Iceland, Glenwood, Glenrothes	630	441	7,741	3.4
*Other Glenwood shops, Glenrothes	340	221	3,770	0.8
Tesco Express, Sth Park Rd, Glenrothes	410	308	16,750	5.2
Other Glenrothes shops (notional estimate)	1,750	1,138	3,770	4.3
Leslie	585	380	3,770	1.4
Markinch	535	348	3,770	1.3
Kinglassie & Thornton	655	425	3,770	1.6
Falkland & Freuchie	410	267	3,770	1.0
Ladybank & Kettlebridge	355	231	3,770	0.9
Sub total	16,997	10,520		104.0
Leven Town Centre				
*Sub total-Town Centre shops (excluding Riverside Retail Park)	2,180	1,417	4,060	5.8
*Sainsbury's, Riverside RP	2,700	1,620	13,017	21.1
*B&M, Riverside RP (1,530 sq m gross- 25% conv)	383	306	3,911	1.2
*Home Bargains, Riverside Rd (2060 sq m gross- 25% conv)	515	412	8,250	3.4
*Lidl, Mitchell St, Leven (1,060 sq m gross-90% conv)	954	716	11,292	8.1
Aldi, Turpie Rd, Leven-1,480sqm gross, 990 sq m net- 80% conv	1,184	792	13,962	11.1
Sub total	5,736	3,846		44.8
East Wemyss				
Methil/ Methilhill	2,328	1,513	3,770	5.7
Buckhaven	1,215	790	3,770	3.0
Kennoway & Windygates & Upper Largo	776	504	3,770	1.9
Lundin Links & Lower Largo	329	214	3,770	0.8
Newburgh & Strathmiglo & Auchtermuchty	662	430	3,770	1.6
Sub total	5,586	3,631		13.7
Total Mid Fife turnover at average levels				
<i>Under-trading below average levels</i>				
	-5%			-19.4
Total Mid Fife	72,295	45,473		386.3
Note				
* Goad gross floorspace data 2019, assumed for 2020, provided by the Council.				
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2019 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 30% for 2019, to allow for the general decline in shop numbers over the period. Average supermarket turnover ratios based on the Retail Ranking 2020 and other Mintel research on supermarket operator floorspace, adjusted to remove petrol sales, plus an allowance for VAT added- in 2019 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, 2020 (in 2019 prices)

	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
St Andrews Town Centre				
*Tesco Metro	1,350	945	12,357	11.7
*Sainsbury's Local	600	450	16,320	7.3
*Rest of Town Centre	2,000	1,300	4,920	6.4
Sub total	3,950	2,695		25.4
Morrisons, St Andrews	3,740	1,870	12,810	24.0
Aldi, Tom Stewart Lane, St Andrews (1,331 sq m gross-80% conv)	1,065	746	13,962	10.4
M&S Simply Food, Largo Rd	1,395	977	10,188	9.9
Other St Andrews shops	424	276	3,936	1.1
Balmullo, Guardbridge, Kingsbarns, Leuchars, S'kinness	987	642	3,936	2.5
Sub total	7,611	4,509		47.9
Cupar Town Centre				
*Co-op	1,200	780	9,767	7.6
*Lidl (total 2,000 sq m gross) 80% conv	1,600	1,040	11,292	11.7
*Rest of Town Centre	2,170	1,411	4,428	6.2
Sub total	4,970	3,231		25.6
Tesco, Cupar (total 2,033 sq m gross/ 1,338 net-c70% conv- agent data)	1,423	937	12,357	11.6
Aldi, South Rd, Cupar (total 1,587 sq m gross- 80% conv)	1,270	889	13,962	12.4
Ceres & Dairsie	396	258	3,936	1.0
*Anstruther	510	332	3,936	1.3
Cellardyke & Crail & St Monans & Pittenweem	883	574	3,936	2.3
Elie & Colinsburgh	284	184	3,936	0.7
Tayport/Wormit & Newport	1,066	693	3,936	2.7
Sub total	5,832	3,866		32.0
Total East Fife turnover at average levels				131.0
<i>Under- trading below average levels</i>				-0.7
Total East Fife	22,363	14,301		130.2
Note				
* Goad gross floorspace data 2019, assumed for 2020, provided by the Council.				
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2019 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 30% for 2019, to allow for the general decline in shop numbers over the period. Average supermarket turnover ratios based on the Retail Ranking 2020 and other Mintel research on supermarket operator floorspace, adjusted to remove petrol sales, plus an allowance for VAT added- in 2019 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 2019 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 three proposed discount foodstores, a budget mixed goods retailer, an M&S Simply Food store plus neighbourhood stores and others. 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. 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. The Freescale site in Dunfermline is now the

focus of attention for development of an education campus.

5.8.3 In Mid Fife, there is a revised application for development of a Lidl store at the former bus depot to replace the existing consent. There has been no progress on developing the consents for the Kingslaw and Burnside neighbourhood centres. There are two

other relatively minor consents awaiting development- see Table 5.11.

5.8.4 In East Fife, consent for the latest version of the proposed mixed convenience and comparison floorspace development at South Road, Cupar, await development. There are multiple previous alternative versions.

Table 5.11 Proposed convenience floorspace in Fife: consents and applications 2020 (in 2019 prices)				
	Floorspace sq m		Turnover ratio £/sq m	Turnover £million
	gross	net		
Planning consents included in the 2020 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.	2,012	1,220	11,292	13.8
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-75% conv) Other proposed units are for bulky goods (5,435 sq m gross) Section 42 application submitted to allow up to 50% of sales floorspace in units 1-4 to sell convenience goods 20/01189/FULL	2,044 1,990	1,431 1,493	10,188 11,292	14.6 16.9
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	432	302	8,500	2.6
Freescale site (Shepherd Offshore), Dunfermline -16/03359/ARC -not built Imminent alternative application for education campus development and minor retail. Original consent no longer relevant as a draw on forecast retail expenditure capacity				
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				
Former Stagecoach Depot, Kirkcaldy-16/02147/FULL & 16/02147/NM1 -not built Lidl relocation from Esplanade- 2,174 sq m gross, 1,327 sq m net Proposed convenience floorspace (85%): 1,848 sq m gross, 1,128 sq m net Existing store: 1,286 sq m gross, 996 sq m net Existing convenience floorspace: 1,093 sq m gross, 847sq m net Net difference	755	281	11,292	3.2
Kingslaw Village/ Burnside Neighbourhood Centres 10/01774/EIA-not built Kirkcaldy-Two supermarkets- 1,500 sq m gross and 370 sq m gross- not built	1,870	1,122	8,500	9.5
CISWO site, North St, Glenrothes 15/03140/PPP & 16/02458/ARC 5 units:Class 1 retail and other commercial use options Units 1,4 & 5 now occupied Units 2&3- total 836 sq m could be retail or other Use Classes. Cannot record until known.	836	585		
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 (Latest development scheme)- not built Floorspace from the planning application proposed block plan drawing- November 2019 Total 7 units: 3,815 sq m gross. Unit 1 (2,136 sq m gross up to 40% conv); Unit 2 (750 sq m gross at 100% conv); Units 3 & 7 (557 sq m gross 30% conv); Units 4,5,6 (372 sq m gross conv and mixed) Convenience total. (Net/ gross ratio of 80% - R MacL estimate) Comparison total There are previous consents with variations 15/04418, 18/00978, 19/03530, 19/03532, 19/03535	2,144 1,672	1,715 1,337	8,500	14.6
Current applications and Masterplan: not included in the 2020 Capacity Study				
Former Stagecoach Depot, Kirkcaldy-Lidl relocation Revised application submitted 20/00450/FULL. Undetermined Oct 2020 Proposed Lidl floorspace (total) 2,018 sq m gross, 1,410 sq m net				
Craigtown- 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 2020 Retail Rankings for Lidl 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 Craigtown 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 2020-25, 2025-30 and for the total ten-year period 2020-30, 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 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 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, but there would probably be little attraction of new trade.

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. It is also consistent with the probability that the formats of the current

retail consents would probably not capture significant levels of leakage from beyond the retail catchment area in Fife in which they are located.

6.3.6 Under the high estimates, there is still significant forecast negative spare capacity in West Fife, moderate negative spare capacity in Mid Fife and slight negative spare capacity in East Fife.

6.4 Interpretation

6.4.1 The 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 2030, (especially in West and Mid 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, given the smaller scales required. 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 2019 prices)			
	2020-25	2025-30	2020-30
	£million	£million	£million
(a) Current under-trading (Table 5.8)	-64.7		-64.7
(b) Growth in retained expenditure (turnover)- Table 5.4	-1.4	8.2	6.8
(c) Less planning commitments: (selected consents- Table 5.11)	-16.6		-16.6
Low estimate (a+b+c)	-82.6	8.2	-74.4
(d) Add: potential to reduce outflow	2025	2030	
Outflow £million- Table 5.4	-23.0	-23.6	
Outflows to centres outside Fife-Tables 5.3 & 5.4	-12.5	-12.9	
Potential to clawback up to 50% of leakage to centres outside Fife	6.3	0.17	6.4
(e) Add: potential to increase inflow- Table 5.4			
Assume negligible			
High estimate (a+b+c+d+e)	-76.4	8.4	-68.0
Equivalent convenience floorspace	£ per sq m	£ per sq m	
* Turnover/ floorspace ratio	12,960	13,313	
	sq m net	sq m net	sq m net
Low	-6,400	600	-5,800
High	-5,900	600	-5,300
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
* The turnover ratio derives from the 2019 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons, ASDA, Aldi and Lidl, at £13,030 per sq m. The ratio is adjusted to relate to 2025 and 2030, based on % turnover growth in Fife -Table 5.7			

Table 6.2			
Mid Fife: forecast spare convenience expenditure capacity (in 2019 prices)			
	2020-25	2025-30	2020-30
	£million	£million	£million
(a) Current under-trading (Table 5.9)	-19.4		-19.4
(b) Growth in retained expenditure (turnover)- Table 5.5	-0.3	11.9	11.5
(c) Less planning commitments: (selected consents- Table 5.11)	-13.8		-13.8
Low estimate (a+b+c)	-33.6	11.9	-21.7
(d) Add: potential to reduce outflow	2025	2030	
Outflow £million- Table 5.5	-52.3	-53.9	
Outflows to centres outside Fife-Tables 5.3 & 5.5	-10.0	-10.3	
Potential to clawback up to 50% of leakage to centres outside Fife	5.0	0.15	5.2
(e) Add: potential to increase inflow- Table 2.5			
Assume negligible			
High estimate (a+b+c+d+e)	-28.6	12.0	-16.6
Equivalent convenience floorspace	£ per sq m	£ per sq m	
* Turnover/ floorspace ratio	12,960	13,313	
	sq m net	sq m net	sq m net
Low	-2,600	900	-1,700
High	-2,200	900	-1,300
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
* The turnover ratio derives from the 2019 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons, ASDA, Aldi and Lidl, at £13,030 per sq m. The ratio is adjusted to relate to 2025 and 2030, based on % turnover growth in Fife -Table 5.7			

Table 6.3			
East Fife: forecast spare convenience expenditure capacity (in 2019 prices)			
	2020-25 £million	2025-30 £million	2020-30 £million
(a) Current under-trading (Table 5.10)	-0.7		-0.7
(b) Growth in retained expenditure (turnover)- Table 5.6	-2.6	1.9	-0.7
(c) Less planning commitments: Table 5.11	-14.6		-14.6
Low estimate (a+b+c)	-17.9	1.9	-16.0
(d) Add: potential to reduce outflow			
2025			
2030			
Outflow £million- Table 5.6	-33.1		-33.6
Outflows to centres outside Fife-Tables 5.3 & 5.6	-21.0		-21.3
Potential to clawback up to 50% of leakage to centres outside Fife	10.5	0.16	10.6
(e) Add:potential to increase inflow- Table 2.6			
Assume negligible			
High estimate (a+b+c+d+e)	-7.4	2.1	-5.4
Equivalent convenience floorspace	£ per sq m	£ per sq m	
* Turnover/ floorspace ratio	12,960	13,313	
	sq m net	sq m net	sq m net
Low	-1,400	100	-1,300
High	-600	200	-400
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
* The turnover ratio derives from the 2019 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons, ASDA, Aldi and Lidl, at £13,030 per sq m. The ratio is adjusted to relate to 2025 and 2030, 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 2020/21, 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 UK, *Precisely* estimate that expenditure per capita on comparison goods could have fallen by around 16% in 2020. As lockdown measure ease, there is a forecast recovery of nearly 16% increase in expenditure per capita to follow in 2021.

7.3.3 For the Fife catchment areas, the forecast growth rates per annum from 2020-25 range between 5.5% and 5.9% for the three catchment areas- see footnote to Table 7.1 During 2025-30, the forecast growth rates are lower at 2% and 2.3% per annum.

7.3.4 The forecast comparison expenditure per capita figures by *Precisely* differ from those in the 2019 Capacity Study, mainly due to their views on effects of the Covid pandemic, and revised deduction for internet spending.

7.3.5 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.

7.3.6 *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 2020 (10% reduction).

7.3.7 For 2025 and 2030, we have **not** applied the forecast proportions internet spending by *Precisely*, because it would result in an extremely high level of spare expenditure capacity to support additional comparison floorspace in Fife to 2030. This outcome appears unrealistic.

7.3.8 *Precisely* has estimated almost no change in the proportions of SFT from 2020 to 2025. We predict an increase in the proportion driven by impetus from the pandemic, especially against the background of shopping and lifestyle trends described in section 3.

Table 7.1			
Fife comparison expenditure per capita per annum (in 2019 prices)			
Catchment areas	2020 £	2025 £	2030 £
West Fife	3,350	4,443	4,967
Mid Fife	3,314	4,420	4,954
East Fife	3,377	4,403	4,860
<i>*excluding special forms of trading</i>			
West Fife	2,310	2,755	2,881
Mid Fife	2,285	2,740	2,873
East Fife	2,328	2,730	2,819
Note <i>Precisely</i> was formerly Pitney Bowes			
Original expenditure per capita data in the top three rows provided by <i>Precisely</i> in their Geolnsight report 2020 for this study is in 2019 prices			
Comparison expenditure growth rates <i>per annum</i> for Fife are:			
Growth rate per annum		2020-25	2025-30
	West Fife	5.81%	2.25%
	Mid Fife	5.93%	2.31%
	East Fife	5.45%	1.99%
*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. <i>Precisely</i> publishes estimates of the proportions of SFT for the UK.			
The proportions in <i>Precisely's</i> Retail Expenditure Product Guide 2020/21, Table 3.4 are:			
		-34.5%	-34.7%
			-38.3%
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 <i>Precisely's</i> proportions to acknowledge the issue. This is applied for 2020 below.			
For 2025 and 2030, higher proportions are applied from estimates by R MacLean, as explained in the text.			
Deductions for SFT applied in this study		-31.1%	-38.0%
			-42.0%

Table 7.2					
Fife residents' comparison expenditure potential (in 2019 prices)					
<i>Excluding SFT (special forms of trading)</i>					
Catchment areas	2020 £ million	<i>growth</i> 2020-25 £ million	2025 £ million	<i>growth</i> 2025-30 £ million	2030 £ million
West Fife	296.2	57.0	353.2	15.3	368.5
Mid Fife	416.1	82.8	498.9	23.0	521.9
East Fife	143.3	24.7	168.0	5.1	173.1
Total Fife	855.6	164.4	1,020.1	43.4	1,063.5
Note					
From Tables 1.1 and 7.1. Figures are rounded.					

7.3.9 We estimate that internet spending will largely account for 38% of comparison expenditure by 2025 and by 42% by 2030 as our high estimate of capacity in Table 7.1. The reason is explained in section 8.

7.3.10 Forecasts of the total comparison expenditure potential of the residents of each retail catchment area are shown in Table 7.2. The growth rate to 2030 is the result of combining projected population growth with the forecast growth in expenditure per capita. The forecast total comparison expenditure potential

of Fife residents in 2030 is less than the forecast to 2029 in the 2019 Capacity Study.

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. 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.

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

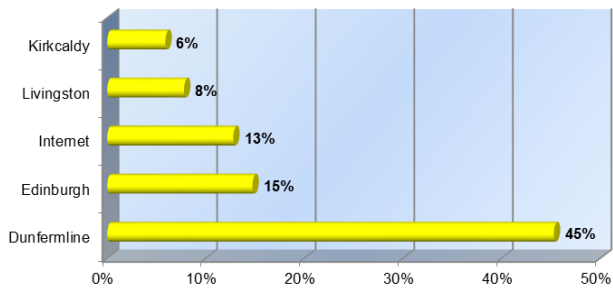
7.5.1 Like the analysis in section 5, the relationship between total expenditure and turnover in each catchment area is defined simply as: residents' expenditure potential plus inflows, less outflows equals total turnover.

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.

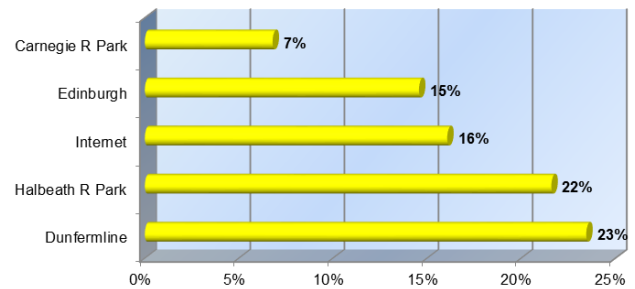
Figure 7.1 Comparison shopping- most frequently visited destinations (including internet): NEMS household survey 2016

Goods categories graphs exclude *don't know's, don't buy, varies*

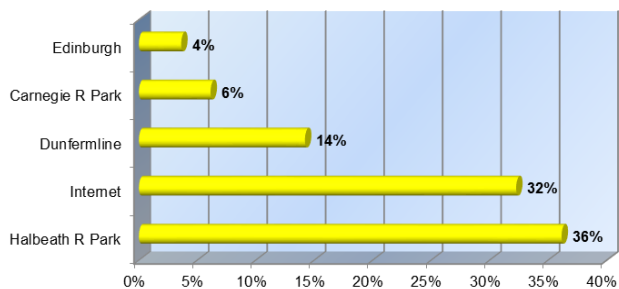
West Fife: most frequently visited stores/ centres for clothes, shoes and other fashion items by residents



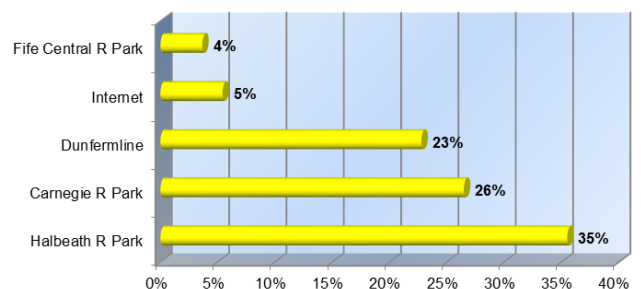
West Fife: most frequently visited stores/ centres for furniture, floorcoverings and soft furnishings by residents



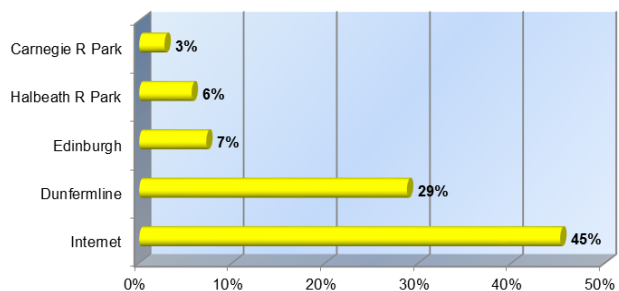
West Fife: most frequently visited stores/ centres for large domestic appliances by residents



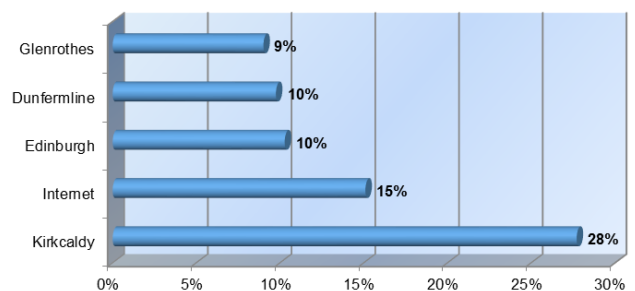
West Fife: most frequently visited stores/ centres for DIY and hardware by residents



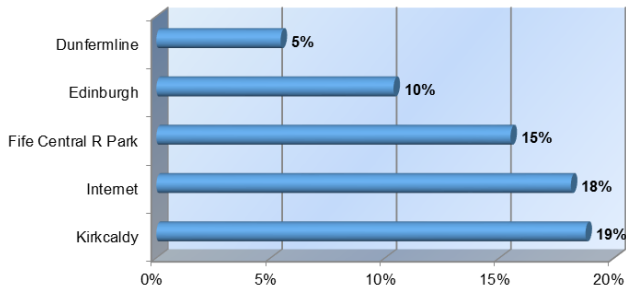
West Fife: most frequently visited stores/ centres for mainly personal goods by residents



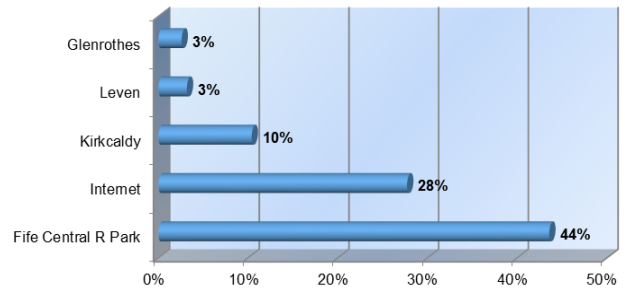
Mid Fife: most frequently visited stores/ centres for clothes, shoes and other fashion items by residents



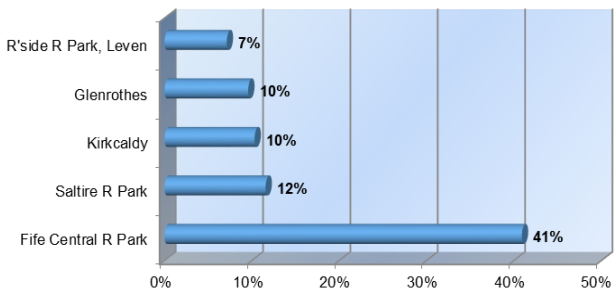
Mid Fife: most frequently visited stores/ centres for furniture, floorcoverings and soft furnishings by residents



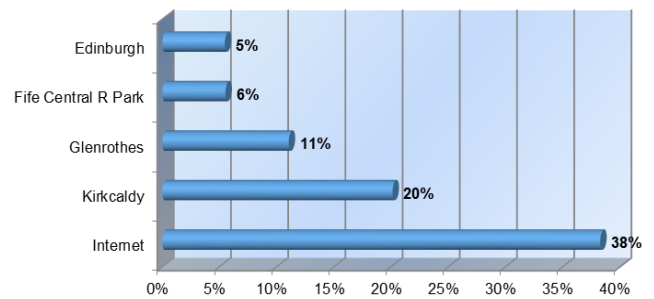
Mid Fife: most frequently visited stores/ centres for large domestic appliances by residents



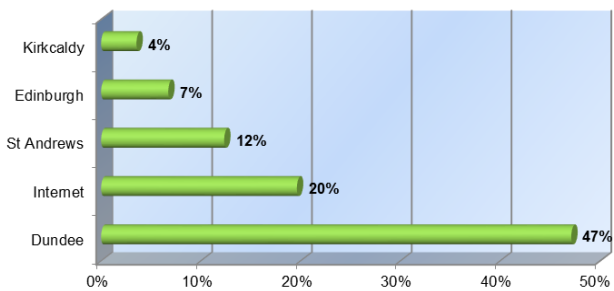
Mid Fife: most frequently visited stores/ centres for DIY and hardware by residents



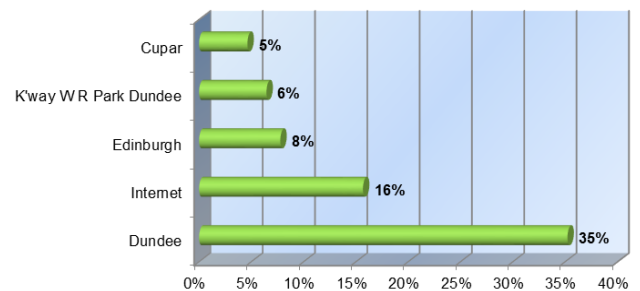
Mid Fife: most frequently visited stores/ centres for mainly personal goods by residents



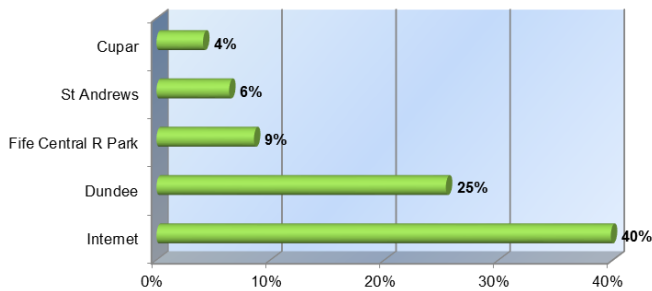
East Fife: most frequently visited stores/ centres for clothes, shoes and other fashion items by residents



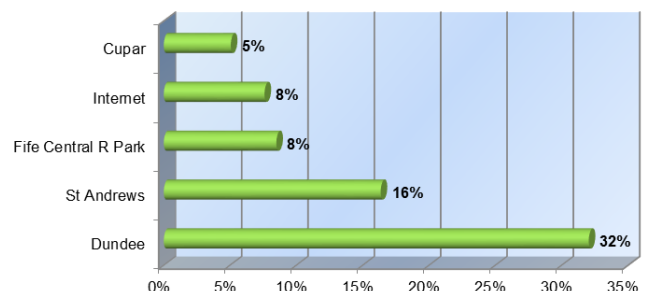
East Fife: most frequently visited stores/ centres for furniture, floorcoverings and soft furnishings by residents



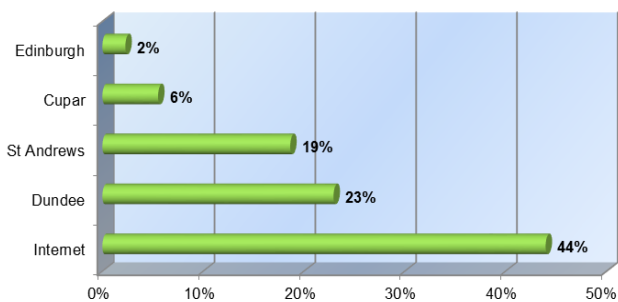
East Fife: most frequently visited stores/ centres for large domestic appliances by residents



East Fife: most frequently visited stores/ centres for DIY and hardware by residents



East Fife: most frequently visited stores/ centres for mainly personal goods by residents



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 2020, 2025 and 2030. 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 2020

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 from last year provided by Goad (2019) and other sources, including data from the Council, as explained in subsection 5.6. Note that we have deducted some comparison floorspace from the town centres of Dunfermline and Kirkcaldy associated with closures in 2020.

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.

7.6.3 Returning to our retail market commentary in section 4, Tables 7.8 to 7.10 reveal the stronger performance of Dunfermline and St Andrews relative to Kirkcaldy and Glenrothes in terms of the comparison turnover/floorspace ratios.

Table 7.4 West Fife comparison expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		296.2	353.2	368.5
Add: inflows from rest of Fife	15%	43.2	51.5	53.8
inflows from outside Fife	6%	19.0	22.7	23.7
Less: outflows	-33%	-98.9	-117.9	-123.0
Retained expenditure (turnover)		259.6	309.5	322.9
Note				
Inflows and outflows from Appendix 3				

Table 7.5 Mid Fife comparison expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		416.1	498.9	521.9
Add: inflows from rest of Fife	9%	37.0	44.4	46.4
inflows from outside Fife	5%	21.2	25.4	26.6
Less: outflows	-35%	-147.7	-177.1	-185.2
Retained expenditure (turnover)		326.6	391.6	409.7
Note				
Inflows and outflows from Appendix 3				

Table 7.6 East Fife comparison expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		143.3	168.0	173.1
Add: inflows from rest of Fife	4%	6.0	7.0	7.2
inflows from outside Fife	25%	35.4	41.5	42.7
Less: outflows	-70%	-99.7	-116.8	-120.4
Retained expenditure (turnover)		85.0	99.6	102.6
Note				
Inflows and outflows from Appendix 3				

Table 7.7 Fife comparison expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		855.6	1,020.1	1,063.5
Add:				
inflows from outside Fife	9%	75.6	90.1	94.0
Less: outflows	-30%	-260.0	-310.0	-323.2
Retained expenditure (turnover)		671.2	800.7	835.2
Note				
Inflows and outflows from Appendix 3				

Table 7.8
West Fife: comparison floorspace and turnover, 2019 (in 2018 prices)

	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
Dunfermline Town Centre				
* (1)Town Centre shops	30,590	19,884	6,344	126.1
*Tesco, Winterthur Lane (total 8,000 sq m gross-est 30% comp)	2,400	1,440	5,892	8.5
*ASDA Halbeath (total 9,540 + 1,162 mez) sq m gross- est 45% comp	4,816	2,890	5,722	16.5
ASDA St Leonards-total 4,749 sqm (25% comp)	1,187	712	5,722	4.1
Tesco Duloch-total 6,147 sq m (18% comp)+ ext 2,747 (78% comp)	3,249	1,949	5,892	11.5
Aldi Duloch (1606 sqm gross, 1,125 sqm net -est 20% comp)	321	225	7,236	1.6
Dobbies Garden Centre (6,450 sqm total- est 60% comp)	3,870	3,096	1,174	3.6
Other Leisure Park (Ed.Wollen Mill Maidenhead Aquatics)	940	752	798	0.6
Aldi Halbeath Rd (13/03345-1,657 gross,1,158 net -includes extension- est 20% comp)	331	232	7,236	1.7
Other Dunfermline shops	2,776	1,805	2,538	4.6
*Inverkeithing	1,100	715	2,538	1.8
*Kincardine	240	156	2,538	0.4
*Rest of Dalgety Bay	630	410	2,538	1.0
Aldi, Donibristle, Dalgety Bay - new (1,650 sq m gross, 1,125 net - est 20% comp)	330	225	7,236	1.6
ASDA Dalgety Bay (3,437 sq m gross 20% comp)	687	412	5,722	2.4
Culross/ Rosyth/Cairneyhill/Oakley/ Limekilns/Newmills	963	626	2,538	1.6
*Kelty	610	397	2,538	1.0
Sub total (excl Dunfermline TC)	24,452	16,041		62.5
Cowdenbeath Town Centre				
*Town Centre shops	3,420	2,223	2,855	6.3
Aldi, Cowdenbeath (14/00803-1,587 sq m gross, 1,140 sq m net, 296 net comp)	317	296	7,236	2.1
Retail Parks (see Appendix 4)				
Carnegie Retail Park, Dunfermline	7,998	6,398		16.9
Halbeath Retail Park, Dunfermline (excl ASDA)	10,740	8,334		33.5
Sub total	18,738	14,732		50.4
Other Retail Warehouses				
Bed Shed, Baldridgeburn, Dunfermline	1,110	888	2,263	2.0
Sterling Home Store, Dunfermline	2,500	2,000	4,774	9.5
Connections Furnishings, Comfort Store, Inverkeithing	450	360	1,350	0.5
Sub total	4,060	3,248		12.0
Total West Fife	81,577	56,423		259.6

Note

* Goad gross floorspace data 2019, provided by the Council.

(1) Dunfermline TC gross floorspace has been partly updated for 2020 to deduct several closures identified in the Fife Retail Market section 4
 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 30% for 2018, 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, 2019 (in 2018 prices)				
	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
Kirkcaldy Town Centre				
Lidl (1,286 sq m gross & 966 sq m net of which 119 sq net is comp- see Table 2.11	193	119	7,015	0.8
* (1)Rest of Town Centre	28,770	18,701	4,417	82.6
Sub total	28,963	18,820		83.4
Morrisons, Inveriel				
6,369 sq m gross, 3,519 sq m net-704 sq m comp (20%)	1,274	704	6,256	4.4
ASDA, Kirkcaldy	4,756	2,564	5,722	14.7
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	4,678	2.4
Aldi, McKenzie St, Kirkcaldy (1,493 sq m gross total)- 20% comp	299	224	7,236	1.6
Aldi, Ferrard Rd, Kirkcaldy				
(Total 1606 sq m gross/ 1,125 net- est 20% comp)	321	225	7,236	1.6
Other Kirkcaldy shops (excl Fife Central RP)	5,517	3,586	2,208	7.9
*Lochgelly	2,930	1,905	2,208	4.2
*Burntisland	640	416	2,208	0.9
Sub total	16,577	10,128		37.7
Glenrothes Town Centre				
*Kingdom Centre shops	16,210	10,537	4,417	46.5
*Morrisons, Flemington Rd, Glenrothes (4,850 sq m gross-20% comp)	970	485	6,256	3.0
Lidl, Leslie Rd, Glenrothes (1,000 sq m gross-10% comp)	100	75	7,015	0.5
*Aldi, Flemington Rd, Glenrothes (1,300 sq m gross- est 15% comp)	195	137	7,236	1.0
ASDA, Fullerton Rd, Glenrothes				
(Total 7,897 sq m gross- 3,554 sq m gross comp)	3,554	2,132	5,722	12.2
*Cadham Centre, Glenrothes	60	39	2,208	0.1
*Glenwood shops, Glenrothes	450	293	2,208	0.6
Other Glenrothes shops (notional estimate)	1,000	650	2,208	1.4
Falkland / Freuchie/ Ladybank/ Kingskettle/ L Links/Newburgh	1,643	1,068	2,208	2.4
Sub total	7,972	4,878		21.3
Leven Town Centre				
*Town Centre shops (excluding Riverside Retail Park)	6,290	4,089	3,092	12.6
*Lidl, Mitchell St, Leven (1,060 sq m gross-10% comp)	106	80	7,015	0.6
Aldi, Turpie Rd, Leven-1,480sqm gross, 990 sq m net- 20% comp	296	198	7,236	1.4
Methil (excl Riverside Furnishings)/Buckhaven	1,469	955	2,208	2.1
Leslie/ Markinch	2,412	1,568	2,208	3.5
Aberdour/Dysart/Cardenden/Kinghorn/Kinglassie/Thornton	1,931	1,255	2,208	2.8
Sub total	6,215	4,056		10.3
Retail Parks (see Appendix 6)				
Fife Central Retail Park, Kirkcaldy	19,140	14,614		68.6
Saltire Retail Park, Glenrothes	11,480	9,184		18.4
Riverside R P, Leven incl Home Bargains (less 25% of B&M and HB)	6,223	4,494		22.3
Sub total	36,843	28,292		109.3
Other Retail Warehouses				
*B&M, Flemington Rd, Glenrothes (1,500 sq m gross- 75% comp)	1,125	900	3,949	3.6
Stocks Discount Warehouse, Kirkcaldy (carpets)	2,291	1,833	1,000	1.8
Sub total	3,416	2,733		5.4
Total Mid Fife	122,485	83,531		326.6
Note				
* Goad gross floorspace data 2019, provided by the Council				
(1) Kirkcaldy TC gross floorspace has been partly updated for 2020 to deduct several closures identified in the Fife Retail Market section 4				
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 30% for 2018, 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 ration assumed at 70% of this. Other towns at 50% of Kirkcaldy TC ratio.				

Table 7.10				
East Fife: comparison floorspace and turnover, 2019 (in 2018 prices)				
	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
St Andrews Town Centre				
*Town Centre shops	13,390	8,704	5,469	47.6
Aldi, Tom Stewart Lane, St Andrews (1,331 sq m gross-20% comp)	266	186	7,236	1.3
Other St Andrews shops	1,786	1,161	2,187	2.5
Sub total	2,052	1,347		3.9
Cupar Town Centre				
*Lidl (total 2,000 sq m gross) 20% comp	400	260	7,015	1.8
*Rest of Town Centre	9,060	5,889	3,281	19.3
Sub total	9,460	6,149		21.1
Tesco, Cupar (total 2,033 sq m gross/ 1,338 net-c30% comp- agent data)	610	401	5,892	2.4
Aldi, South Rd, Cupar (total 1,587 sq m gross- 20% comp)	317	222	7,236	1.6
*Anstruther	2,170	1,411	2,187	3.1
Crail / Pittenweem	1,573	1,022	2,187	2.2
Tayport/ Newport	721	469	2,187	1.0
Other East Fife	1,433	931	2,187	2.0
Sub total	6,824	4,457		12.4
Total East Fife	31,726	20,656		85.0
Note				
* Goad gross floorspace data 2019, provided by the Council				
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 30% for 2018, to allow for the general decline in shop numbers over the period.				

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. These are essentially the comparison floorspace elements of the consents shown in Table 5.11.

7.8 Edinburgh St James Centre

7.8.1 In Edinburgh, work on the redevelopment of the St James Shopping Centre has been delayed by the Covid 19 pandemic and reports are that it may open in Spring 2021, depending on circumstances associated with the continuation of restrictions relating to Covid and other factors.

7.8.2 Assuming the scheme is successful, it will almost certainly attract more trade from Fife in 2021 and beyond, following its completion and opening. The prospect of increased comparison expenditure leakage from Fife in the future appears a strong possibility.

Table 7.11 Proposed comparison floorspace in Fife: consents and applications 2020 (in 2019 prices)				
	Floorspace sq m		Turnover ratio £/sq m	Turnover £million
	gross	net		
Planning consents included in the 2020 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.	355	213	7,233	1.5
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-25% comp) Other proposed units are for bulky goods (5,435 sq m gross) Section 42 application submitted to allow up to 50% of sales floorspace in units 1-4 to sell convenience goods 20/01189/FULL	498 5,435	373 4,348	7,233 2,800	2.7 12.2
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	857	600	3,100	1.9
Freescal site (Shepherd Offshore), Dunfermline -16/03359/ARC -not built Imminent alternative application for education campus development and minor retail. Original consent no longer relevant as a draw on forecast retail expenditure capacity				
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	3100	1.4
Former Stagecoach Depot, Kirkcaldy-16/02147/FULL & 16/02147/NMV1 -not built Lidl relocation from Esplanade- 2,174 sq m gross, 199 sq m net Proposed comparison floorspace (15%): 326 sq m gross, 1,128 sq m net Existing store: 1,286 sq m gross, 996 sq m net Existing comparison floorspace: 193 sq m gross, 149sq m net Net difference	326 193 133	199 149 50	7,233	0.4
CISWO site, North St, Glenrothes 15/03140/PPP & 16/02458/ARC 5 units:Class 1 retail and other commercial use options Units 1,4 & 5 now occupied Units 2&3- total 836 sq m could be retail or other Use Classes. Cannot record until known.	836	585		
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 (Latest development scheme)- not built Floorspace from the planning application proposed block plan drawing- November 2019 Total 7 units: 3,815 sq m gross. Unit 1 (2,136 sq m gross 60% comp); Unit 2 (750 sq m gross at 100% conv); Units 3 & 7 (557 sq m gross up to 70% comp); Units 4,5,6 (372 sq m gross conv and mixed) Convenience total. (Net/ gross ratio of 80% - R MacL estimate) Comparison total There are previous consents with variations 15/04418, 18/00978, 19/03530, 19/03532, 19/03535	0 1,672	0 1,337	4,000	5.3
Current applications and Masterplan: not included in the 2020 Capacity Study				
Former Stagecoach Depot, Kirkcaldy-Lidl relocation Revised application submitted 20/00450/FULL. Undetermined Oct 2020 Proposed Lidl floorspace (total) 2,018 sq m gross, 1,410 sq m net				
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 2020 Retail Rankings for Lidl 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 2030.

8.2 Spare comparison expenditure capacity

8.2.1 Over-trading above average levels is generally 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 is substantial to 2030 (Tables 7.4-7.7), and it offers the principal source of spare capacity to support additional comparison retail floorspace. However, it is also probable that a significant amount of the forecast expenditure growth will materialise as internet-based retail spending. This is far more important than in the past.

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 rather limited.

8.2.4 So, the approach adopted to calculate spare convenience capacity in section 6 is better modified to bring the comparison

expenditure capacity forecasts for Fife closer to the direction of the retail market.

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. There is great uncertainty over the future rate of growth in internet retail spending, so it is reasonable to include a variant in this key factor to provide a range of forecasts. All the evidence is that the proportion of internet retail spending increasing, especially following the impact of Covid 19 and there is no reason to suppose why that direction will change over the next few years.

8.2.7 More weight should be given to the expenditure capacity figures than 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 2025 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 2025 and 2030, 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.

8.3.2 In West Fife, the forecast spare capacity up to 2030 at the high end of the range is nearly £46 million, with equivalent retail

Table 8.1 West Fife: forecast spare comparison expenditure capacity (in 2019 prices)			
	2020-25 £million	2025-30 £million	2020-30 £million
High estimate			
(a) Growth in retained expenditure (turnover)- Table 7.4	49.9	13.4	63.4
(b) Less planning consents: - Table 7.11	-17.8		-17.8
High estimate (a+b)	32.1	13.4	45.5
Low estimate			
(a) Growth in retained expenditure (turnover)- Appendix 5	39.9	6.7	46.7
(b) Less planning consents: - Table 7.11	-17.8		-17.8
Low estimate (a+b)	22.1	6.7	28.8
Equivalent comparison floorspace	£ per sq m	£ per sq m	
Turnover/ floorspace ratio- high	7,568	7,894	
Turnover/ floorspace ratio- low	7,324	7,486	
	sq m net	sq m net	sq m net
High	4,200	1,700	5,900
Low	3,000	900	3,900
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
The turnover ratio derives from the current turnover ratio in Dunfermline TC £ 6,344			
The ratio is increased to relate to 2025 and 2030, 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 2019 prices)			
	2020-25 £million	2025-30 £million	2020-30 £million
High estimate			
(a) Growth in retained expenditure (turnover)- Table 7.5	65.0	18.0	83.1
(b) Less planning consents: - Table 7.11	-1.0		-1.0
High estimate (a+b)	64.0	18.0	82.0
Low estimate			
(a) Growth in retained expenditure (turnover)- Appendix 5	52.4	9.5	61.9
(b) Less planning consents: - Table 7.11	-1.0		-1.0
Low estimate (a+b)	51.3	9.5	60.8
Equivalent comparison floorspace	£ per sq m	£ per sq m	
Turnover/ floorspace ratio- high	5,269	5,496	
Turnover/ floorspace ratio- low	5,099	5,212	
	sq m net	sq m net	sq m net
High	12,100	3,300	15,400
Low	10,100	1,800	11,900
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
The turnover ratio derives from the current turnover ratio in Kirkcaldy TC £ 4,417			
The ratio is increased to relate to 2025 and 2030, 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 2019 prices)			
	2020-25 £million	2025-30 £million	2020-30 £million
High estimate			
(a) Growth in retained expenditure (turnover)- Table 7.6	14.6	3.0	17.6
(b) Less planning consents: - Table 7.11	-5.3		-5.3
High estimate (a+b)	9.3	3.0	12.3
Low estimate			
(a) Growth in retained expenditure (turnover)- Appendix 5	11.4	0.9	12.3
(b) Less planning consents: - Table 7.11	-5.3		-5.3
Low estimate (a+b)	6.1	0.9	7.0
Equivalent comparison floorspace	£ per sq m	£ per sq m	
Turnover/ floorspace ratio- high	6,524	6,805	
Turnover/ floorspace ratio- low	6,314	6,453	
	sq m net	sq m net	sq m net
High	1,400	400	1,800
Low	1,000	100	1,100
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
* The turnover ratio derives from the current turnover ratio in St Andrews TC £ 5,469			
The ratio is increased to relate to 2025 and 2030, based on % turnover growth in Fife -Table 7.7 (high) and Appendix 5 (low)			

floorspace of 5,900 sq m net. Most of the forecast spare capacity relates to the period 2020-25.

8.3.3 In Mid Fife, the forecast spare capacity is up to £82 million by 2030 at the high end, with an equivalent retail floorspace of 15,400 (the applied turnover/ floorspace ratio is lower than that for West Fife). Most of the forecast spare capacity relates to the period 2020-25.

8.3.4 In East Fife, the forecast spare capacity at the high end is around £12 million by 2030, with equivalent retail floorspace of 1,800 sq m net.

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 40% in 2025 instead of 38% in the high estimate. By 2030, it is raised to 45%.

8.3.7 Under the low estimates, the forecast spare capacity in West Fife would be nearly £29 million by 2030. In Mid Fife, it would be nearly £61 million and in East Fife it would be £7 million by 2030.

8.4 Comparison spare capacity applying only Precisely forecasts of SFT

8.4.1 The forecasts of spare comparison expenditure in Tables 8.1- 8.3 are based on estimates of the proportions of internet spending for 2020 by Precisely and estimates of the proportions for 2025 and 2030 by R MacLean.

8.4.2 It is worth viewing the outcome if only the proportions of SFT are applied throughout, as shown in Table 8.4. The spare capacity forecasts and associated notional comparison retail floorspace they would support are extremely high. These appear quite unrealistic for Fife, especially when compared with the existing scale of comparison floorspace, the pace of actual developments and the retail trends described in this study.

8.4.3 The forecasts are inconsistent with those in the 2019 Capacity Study, which were also based on Precisely data forecasts of SFT (then Pitney Bowes). It is not helpful for planning purposes to have wide-ranging changes within a year passing.

Table 8.4					
Forecast spare comparison expenditure capacity - applying Precisely proportions of internet spend only (in 2019 prices)					
				2020-30 £million	floorspace sq m net
Applying Precisely data only on SFT 2020-30					
	2020 % SFT	2025 % SFT	2030 % SFT		
	-31.1%	-31.2%	-34.5%		
West Fife				87.5	11,400
Mid Fife				135.2	25,500
East Fife				25.6	3,900
2019 Retail Capacity Study -high estimate				2019-29 £million	
West Fife				41.4	4,200
Mid Fife				77.9	12,700
East Fife				18.9	2,000
Note					
Applying the same method as in Tables 8.1-8.3					

8.5 Interpretation

8.5.1 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.

8.5.2 In West Fife, the forecast spare comparison expenditure would comfortably support moderate levels of new retail development up to 2030 (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

8.5.3 In Mid Fife, the forecast spare capacity could readily support substantial additional comparison retail floorspace up to 2030.

8.5.4 In East Fife, the forecast spare comparison expenditure capacity is limited up to 2030 but could support low/ moderate levels of additional comparison floorspace over and above existing consents.

9 Summary

9.1 Population change

9.1.1 There is a projected decrease in the Council area population of -940 from 2020 to 2030 (-0.2%), with a forecast population of 370,942 for Fife by 2030. These projections are significantly *lower* than in the 2019 Study.

9.2 Updates since 2019

9.2.1 A limitation of the 2020 Retail Capacity Study is that there has been no retail and service floorspace records for 2020 from Experian. Otherwise, all other data and forecasts have been updated.

9.3 Retail trends

9.3.1 Much of this year has been dominated by the effects of lockdowns and measures such as social distancing and mask-wearing to reduce the impact of Covid19. Our analysis assumes that the retail sector will recover from the current difficulties associated with Covid 19. The effect has been to accelerate changing trends in shopping. These are lifestyle changes with more people working from home which is supportive of increased local shopping opportunities. Reduced travel may create more opportunities for local retailers.

9.3.2 At the same time, our prediction is that people will be shopping in fewer town centres in the future. These will include city centres and in the best large malls, or in town centres with a high-quality, distinctive retail offer.

9.3.3 Levels of online shopping are progressively becoming much higher compared to the past. For retailers, online shopping is putting increasing pressure on the high streets as footfall is lost. Retailers who are not adjusting are likely to close at a faster rate in the future. Quality retailing will be the key to survival and that is not present in all the towns in Fife, notably the largest ones, which are quite exposed to increased internet shopping and increased draw to the major cities for non-food shopping.

9.3.4 Budget retailers, including food discount stores and budget mixed goods

operators are still increasing their representation. In the grocery sector, there is no evidence of market interest in developing large supermarkets.

9.3.5 The hospitality sector (restaurants, cafes and pubs) has been very severely affected by restrictions relating to Covid. When the crisis ends, a return to popularity can be expected.

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 Owing to the market turmoil caused by Covid, there are none of the usual published lists of retail market requirements. Reported Zone A retail rents are mostly down from those in the 2018 Capacity Study.

9.4.3 There has been a fair amount of retail market activity in the main town centres and retail parks in Fife. Although there have been notable store closures, there has also been new arrivals.

9.5 Forecast convenience retail capacity to 2030

9.5.1 Under the forecast *low/ high* range for the next ten years to 2030, there will be substantial negative spare convenience expenditure capacity in West Fife (minus £74.4 million to minus £68.0 million). For Mid Fife, forecast convenience capacity is also negative (minus £21.7 million to minus £16.6 million). For East Fife, there is negative forecast capacity too (minus £16.0 million to minus £5.4 million).

9.5.2 The 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, it does not mean no new development beyond the existing consents, just not very much.

9.6 Forecast comparison retail capacity to 2030

9.6.1 In West Fife, the forecast spare capacity up to 2030 at the high end of the range is nearly £46 million, with equivalent retail

floorspace of 5,900 sq m net. At the low end it is £28.8 million, with equivalent retail floorspace of 3,900 sq m net.

9.6.2 In Mid Fife, the forecast spare capacity is up to £82 million under the high estimate with equivalent retail floorspace of 15,400 sq m net. At the low end it is £60.8 million, with equivalent retail floorspace of 11,900 sq m net.

9.6.3 In East Fife, the forecast spare capacity is up to £12.3 million under the high estimate with equivalent retail floorspace of 1,800 sq m net. At the low end it is £7 million, with equivalent retail floorspace of 1,100 sq m net.

Appendix 1

Fife retail catchment areas- population forecasts

Fife retail catchment area population projections for the Fife Retail Capacity Study 2020					
Retail catchment area	Census 2011	Mid-year 2019	2020	2025	2030
West Fife	123,608	128,806	128,231	128,202	127,907
Mid Fife	181,860	182,913	182,096	182,056	181,636
East Fife	59,730	61,831	61,555	61,541	61,399
Total Fife	365,198	373,550	371,882	371,799	370,942

Note

The 2011 data is taken directly from the 2011 Census, Scotland, based on postcode sector population data for each catchment.

The 2019 Mid-year data is from National Records Scotland (NRS) online based on electoral wards and data zones comprising each catchment.

Data for 2020, 2025 & 2030 derives from the NRS 2018-based population projections for the Fife Council area, apportioned to the three catchment areas from the 2019 Mid-year data.

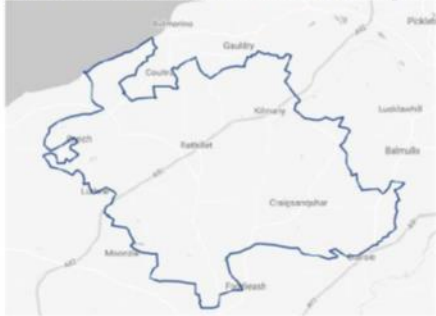
NRS Mid-year population estimates 2019

	Population
East Fife	
Tay Bridgehead ward	15,884
Howe of Fife and Tay Coast ward- part	
<i>Data zone- Kilmany, Rathillet and Logie</i>	548
St Andrews ward	19,702
Cupar ward	14,385
<i>less: Data zone Monimal, Pittlessie and Cults</i>	-960
East Neuk and Landward	12,272
Total	61,831
West Fife	
1 West Fife and Coastal Villages ward	15,685
2 Cowdenbeath ward	22,289
3 Dunfermline North ward	17,326
4 Dunfermline Central ward	18,547
5 Dunfermline South ward	23,679
6 Inverkeithing and Dalgety Bay ward	17,493
<i>less: Data zone St Colme & Aberdour West</i>	-1,179
<i>less: Data zone Aberdour</i>	-936
7 Rosyth ward	15,902
Total	128,806
Mid Fife (by deduction from Fife total)	182,913
Fife	373,550

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 2019 data.



Data zone A - Kilmany, Rathillet and Logie



Data zone B - Monimail, 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 by catchment area 2020	£ million 274.2	£ million 404.1	£ million 124.6		
Destination	Origin- inflows from:			Total inflow	
	West Fife	Mid Fife	East Fife	From rest of Fife £ million	*Visitor spend £ million
West Fife		8%	0%	32.0	12.2
Mid Fife	4%		10%	22.2	12.4
East Fife	0%	3%		11.1	28.3
Total				65.27	52.9
Note					
*Based on catchment residents' expenditure in 2020 multiplied by % visitor spend shown at bottom of Table C					

Table B				
Convenience expenditure outflows 2020				
	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 spending on shopping- Economic Impact of Tourism, Fife & Districts 2019					
(by Destination Research Consultants- report held by Fife Council)					
	£million		%		
*Total direct visitor spending in Fife	459.6		page 9		
Total visitor spend on shopping in Fife	154.1		34% page 9		
Study area 'Districts' in the above report					
	Dunfermline District £million	Kirkcaldy District £million	St Andrews District £million	NE Fife District £million	*Fife Total £million
Total direct visitor spending	105.6	107.4	152.1	93.1	458.2
*pages 16-19					
Deduced spending on shopping (33%)	34.8	35.4	50.2	30.7	151.2
<i>*Fife totals do not match precisely in the report. NE Fife includes Cupar and the rest of East Fife, excluding St Andrews</i>					
Assumed for the 3 Catchment Areas in the Fife Retail Capacity Study in 2020					
	West Fife	Mid Fife	East Fife		
	£million	£million	£million		
All shopping spend	34.8	35.4	80.9		
Convenience 35%- estimate	12.2	12.4	28.3		
Residents' convenience expenditure potential in 2020 Capacity Study	274.2	404.1	124.6		
Visitor spend as % of residents exp.	4%	3%	23%		
Comparison 65%- estimate	22.7	23.0	52.6		
Residents' comparison expenditure potential in 2020 Capacity Study	296.2	416.1	143.3		
Visitor spend as % of residents exp.	8%	6%	37%		

Appendix 3

Comparison expenditure inflows and outflows, including visitor spending

Table D					
Comparison expenditure inflows					
	West Fife	Mid Fife	East Fife		
Residents' expenditure potential by catchment area 2020	£ million 296.2	£ million 416.1	£ million 143.3		
Destination	Origin- inflows from:			Total inflow	
	West Fife	Mid Fife	East Fife	From rest of Fife £ million	*Visitor spend £ million
West Fife		10%	1%	43.2	19.0
Mid Fife	7%		10%	37.0	21.2
East Fife	0%	1%		6.0	35.4
Total				86.19	75.6
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 spending on shopping- Economic Impact of Tourism, Fife & Districts 2019					
(by Destination Research Consultants- report held by Fife Council)					
	£million		%		
*Total direct visitor spending in Fife	459.6		page 9		
Total visitor spend on shopping in Fife	154.1		34% page 9		
Study area 'Districts' in the above report					
	Dunfermline District	Kirkcaldy District	St Andrews District	NE Fife District	*Fife Total
	£million	£million	£million	£million	£million
Total direct visitor spending	105.6	107.4	152.1	93.1	458.2
*pages 16-19					
Deduced spending on shopping (33%)	34.8	35.4	50.2	30.7	151.2
<i>*Fife totals do not match precisely in the report. NE Fife includes Cupar and the rest of East Fife, excluding St Andrews</i>					
Assumed for the 3 Catchment Areas in the Fife Retail Capacity Study in 2020					
	West Fife	Mid Fife	East Fife		
	£million	£million	£million		
All shopping spend	34.8	35.4	80.9		
Convenience 35%- estimate	12.2	12.4	28.3		
Residents' convenience expenditure potential in 2020 Capacity Study	274.2	404.1	124.6		
Visitor spend as % of residents exp.	4%	3%	23%		
Comparison 65%- estimate	22.7	23.0	52.6		
Residents' comparison expenditure potential in 2020 Capacity Study	296.2	416.1	143.3		
Visitor spend as % of residents exp.	8%	6%	37%		

Appendix 4

Retail Parks in Fife- list of retailers

West Fife- Retail Parks: floorspace and turnover, 2020 (in 2019 prices)				
	Floorspace sq m		Turnover ratio £/sq m	Turnover £million
	gross	net		
*Carnegie Retail Park				
B & Q	3,480	2,784	1,846	5.1
Home Bargains (1,010 sq gross- 75% comp)	758	606	8,250	5.0
Pagazzi Lighting	730	584	2,500	1.5
Farmfoods (convenience)				
Dreams	1,030	824	2,262	1.9
Matalan	2,000	1,600	2,161	3.5
Pure Gym (780 sq m gross)				
Total	7,998	6,398		16.9
*Halbeath Retail Park				
Argos	470	118	19,134	2.2
Carphone Warehouse	580	464	12,951	6.0
Pets at Home	2,890	2,312	3,047	7.0
Currys & PC World	580	464	12,951	6.0
Carpetright	970	776	1,197	0.9
B&M	1,800	1,440	3,911	5.6
Homebase	3,450	2,760	2,022	5.6
Halfords (non-retail)- 460sq m gross				
Total	10,740	8,334		33.5
Other retail warehouses				
Bed Shed, Baldrigeburn	1,110	888	2,279	2.0
Sterling Home Store	2,500	2,000	4,774	9.5
Connections Furnishings, Comfort Store, Inverkeithing	450	360	1,350	0.5
Total	4,060	3,248		12.1
Total West Fife	22,798	17,980		62.4
Sources:				
* Goad 2020, where indicated. Otherwise, Council data				
Company average turnover ratios applied, based on Retail Rankings 2020, adjusted to include VAT				

Mid Fife- Retail Parks: floorspace and turnover, 2020 (in 2019 prices)				
	Floorspace sq m		Turnover ratio £/sq m	Turnover £million
	gross	net		
*Saltire Retail Park, Glenrothes				
Matalan	3,160	2,528	2,161	5.5
Poundstretcher	2,420	1,936	2,068	4.0
Homebase	3,420	2,736	2,022	5.5
Carpetright	880	704	1,197	0.8
The Pet Hut	580	464	3,047	1.4
American Golf	1,020	816	1,348	1.1
Total	11,480	9,184		18.4
*Fife Central Retail Park, Kirkcaldy				
Carphone Warehouse	430	344	12,951	4.5
Currys & PC World	1,040	832	12,951	10.8
Bensons	780	624	2,279	1.4
Next	1,570	1,256	3,514	4.4
Next Home	360	288	3,514	1.0
Boots	1,160	928	3,541	3.3
Pets at Home	940	752	3,047	2.3
Harveys & Reid	750	600	2,279	1.4
B&Q	4,930	3,944	1,846	7.3
EE	150	120	5,241	0.6
Argos	1,270	318	19,134	6.1
Tapi Carpets & Floors	1,300	1,040	897	0.9
Oak Furniture Land	770	616	7,305	4.5
Sofology	1,160	928	2,985	6.4
Sofastore	220	176	2,985	0.5
Wren Kitchens	1,360	1,088	7,537	8.2
B&M	950	760	3,911	3.0
Halfords (non-retail)- 1,030 sq m gross				
Total	19,140	14,614		66.5
*Riverside Retail Park, Leven				
B&M, Riverside RP (1,530 sq m gross- 75% comp)	1,148	918	3,911	3.6
Argos	880	220	19,134	4.2
Home Bargains, Riv. Rd (2060 sq m gross- 75% comp)	1,545	1,236	8,250	10.2
B&Q	2,650	2,120	1,846	3.9
Total	6,223	4,494		21.9
Other retail warehouses				
*B&M, Flemington Rd, Glenrothes (1,500 sq m gross- 75% comp)	1,125	900	3,911	3.5
Stocks Discount, Kirkcaldy- carpets	2,291	1,833	1,100	2.0
Total	3,416	2,733		5.5
Total in Kirkcaldy Catchment	40,259	31,024		112.3
Sources:				
* Goad 2020, where indicated. Otherwise, Council data				
Company average turnover ratios applied, based on Retail Rankings 2020, adjusted to include VAT				

Appendix 5

Low comparison expenditure forecast

Table A			
Fife comparison expenditure per capita per annum (in 2019 prices)			
(low forecast)			
Catchment areas	2020 £	2025 £	2030 £
West Fife	3,350	4,443	4,967
Mid Fife	3,314	4,420	4,954
East Fife	3,377	4,403	4,860
<i>*excluding special forms of trading</i>			
West Fife	2,310	2,666	2,732
Mid Fife	2,285	2,652	2,725
East Fife	2,328	2,642	2,673
Note <i>Precisely</i> was formerly Pitney Bowes			
Original expenditure per capita data in the top three rows provided by <i>Precisely</i> in their Geolnsight report 2020 for this study is in 2019 prices			
Comparison expenditure growth rates <i>per annum</i> for Fife are:			
Growth rate per annum		2020-25	2025-30
	West Fife	5.81%	2.25%
	Mid Fife	5.93%	2.31%
	East Fife	5.45%	1.99%
*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. <i>Precisely</i> publishes estimates of the proportions of SFT for the UK.			
The proportions in <i>Precisely's</i> Retail Expenditure Product Guide 2020/21, Table 3.4 are:			
	-34.5%	-34.7%	-38.3%
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 <i>Precisely's</i> proportions to acknowledge the issue.			
The proportions applied in this study (10% less than the above figures) are:			
Deductions for SFT	-31.1%	-40.0%	-45.0%

Table B					
Fife residents' comparison expenditure potential - low forecast (in 2019 prices)					
Excluding SFT (special forms of trading)					
Catchment areas	2020 £ million	<i>growth</i> 2020-25 £ million	2025 £ million	<i>growth</i> 2025-30 £ million	2030 £ million
West Fife	296.2	45.6	341.8	7.7	349.4
Mid Fife	416.1	66.7	482.8	12.1	494.9
East Fife	143.3	19.3	162.6	1.5	164.1
Total Fife	855.6	131.5	987.2	21.3	1,008.4
Note					
From Tables 1.1 and Table A. Figures are rounded.					

Table F1				
West Fife comparison expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		296.2	341.8	349.4
Add: inflows from rest of Fife	15%	43.2	49.9	51.0
inflows from outside Fife	6%	19.0	22.0	22.5
Less: outflows	-33%	-98.9	-114.1	-116.7
Retained expenditure (turnover)		259.6	299.5	306.2
Note				
Low forecast- same method as for high forecasts in Tables 7.4-7.9				

Table F2				
Mid Fife comparison expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		416.1	482.8	494.9
Add: inflows from rest of Fife	9%	37.0	42.9	44.0
inflows from outside Fife	5%	21.2	24.6	25.2
Less: outflows	-35%	-147.7	-171.4	-175.6
Retained expenditure (turnover)		326.6	379.0	388.5
Note				
Low forecast- same method as for high forecasts in Tables 7.4-7.9				

Table F3				
East Fife comparison expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		143.3	162.6	164.1
Add: inflows from rest of Fife	4%	6.0	6.8	6.8
inflows from outside Fife	25%	35.4	40.1	40.5
Less: outflows	-70%	-99.7	-113.1	-114.1
Retained expenditure (turnover)		85.0	96.4	97.3
Note				
Low forecast- same method as for high forecasts in Tables 7.4-7.9				

Table F4				
Fife comparison expenditure and turnover (in 2019 prices)				
	%	2020 £million	2025 £million	2030 £million
Main catchment residents' expenditure potential		855.6	987.2	1,008.4
Add:				
inflows from outside Fife	9%	75.6	87.2	89.1
Less: outflows	-30%	-260.0	-300.0	-306.5
Retained expenditure (turnover)		671.2	774.9	792.0
Note				
Low forecast- same method as for high forecasts in Tables 7.4-7.9				