
Fife Retail Capacity Study 2014



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SECTION 1

Introduction

CH2M HILL and Maria Francké Planning were instructed by Fife Council to prepare this Retail Capacity Study. This study is informed by and replaces the Council's previous '2013 Fife Retail Capacity Study 2013' (2013 FRCS) which was undertaken by Roderick MacLean Associates.

The main purpose of the study is to provide updated information to support the existing West, Mid and East Fife Local Plans and the emerging FIFEplan, which shall replace the three adopted Local Plans covering Fife.

The terms of reference are:

- To provide updated retail information for the Fife Development Plan
- To quantify the extent of expenditure leakage from Fife and the three sub areas in Fife by retail category
- To quantify the scope for additional retail floorspace in Fife and three sub areas for the period 2014-2019
- To provide a broad indication of the likely scope for additional retail floorspace for the period 2019-2024
- To provide a range of retail capacities based on varying levels of population change in and across Fife
- To take account of major retail proposals in and around Fife that could influence retail shopping patterns
- To provide qualitative data and expert opinion to underpin and support the quantitative research
- To advise on a strategy to reduce retail leakage from Fife
- To identify retailer interests in locating to a range of town centres and retail parks in Fife

In addition to the above objectives, the study provides a summary of current and emerging local, regional and national retail planning policy and consideration of market trends and retailer requirements in Fife, informed by various discussions with a range of commercial property consultants active in the area.

This report is structured as follows:

- Section 2 sets out our review of national, strategic and local planning policies relevant to retail planning in Fife
- Section 3 provides an overview of current national economic trends influencing town centres and retailing, including the role of the internet
- Section 4 sets out an assessment of the Fife retail market
- Section 5 explains the quantitative assessment methodology and our assumptions used
- Sections 6 and 7 set the quantitative capacity forecasts for new retail provision within Fife
- Section 8 summarises our findings

Planning Policy Context

In this section we examine the key features of national, regional and local planning policy guidance to provide the context and framework for this study.

2.1 National Policy

2.1.1 SSP (June 2014)

SPP sets out the Scottish Government's policy on how the planning system should promote town centres to help create successful, sustainable places. There are four broad policy principles in paragraph 60 which state that the planning system should:

- 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 development plans, decision-making and monitoring support successful town centres
- Consider opportunities for promoting residential use within town centres where this fits with local need and demand

In preparing the Fife Local Development Plan (FIFEplan LDP) SPP (paragraph 61) requires the Council to identify a network of centres, the relationships between them, their roles and status. It states that plans should identify the following key characteristics when considering the definition as to what constitutes a town centre:

- A diverse mix of uses, including shopping
- A high level of accessibility
- Qualities of character and identity which create a sense of place and further the wellbeing of communities
- Wider economic and social activity during the day and in the evening
- Integration with residential areas

In terms of retail planning, the SPP retains emphasis on the provision of a network of centres; the improvement of town centres; and taking the sequential approach to the location of new retail development. Paragraph 71 reaffirms the gross floorspace threshold of over 2,500 sq. m for undertaking a retail impact analysis, where a retail and leisure development is proposed outwith a town centre and contrary to the development plan.

2.1.2 Community and Enterprise in Scotland's Town Centres (June 2013)

The Community and Enterprise in Scotland's Town Centres Report was produced by the External Advisory Group (EAG) to the Scottish Government. The EAG was assembled to consider and propose actions to help town centres 'recover their drive'.

The report sets out a number of key themes and subsequent actions relating to the encouragement and improvement of town centres. Most relevant to retail planning is the 'Proactive Planning' theme. The key action is reflective of the key principle of the report which recommends that a 'Town Centre First Policy' is adopted and that the sequential test is applied to all footfall-creating uses, from leisure and office, to public facilities and homes.

The Scottish Government responded to the National Review of Town Centres by producing a 'Town Centre Action Plan' in November 2013. Whilst the Scottish Government broadly agrees with the 'Town Centre First Principle', it does not go as far as recommending that the sequential test be mandatory for all forms of development in future planning policy.

2.2 Regional Policy

2.2.1 The SESplan

The most recent SESplan was approved by Scottish Ministers in June 2013. The SESplan applies to the area of West and Mid Fife, and allocates North Dunfermline and the Ore / Upper Leven Valley as strategic development areas for growth and development.

In terms of town centres and retailing Table 1: 'Network of Centres' identifies Dunfermline, Glenrothes and Kirkcaldy as Strategic Town Centres.

Policy 3 of the SESplan sets out that Local Development Plans (LDPs) are required to identify town centres and commercial centres and clearly define their roles. It also sets out that they should promote the network of centres and identify measures necessary to protect them, including setting out the criteria to be addressed when assessing development proposals. The policy also reiterates the promotion of the sequential approach to the selection of locations for retail and commercial leisure proposals.

2.2.2 The TAYplan

The most recent TAYplan was approved by Scottish Ministers in June 2012. The TAYplan applies to the area of East Fife and allocates Cupar North and St Andrews West and Science Park as strategic development areas that will contribute to the economic success of the region.

In terms of the 'Hierarchy of Comparison Retail Centres', Dundee is identified as the regional centre and Perth is identified as the sub-regional centre. Fife is represented by St. Andrews and Cupar, which are identified as 'larger town centres'. Anstruther and Newburgh are also classified as 'smaller town centres' (Policy 7, Table 2). As set out previously, Cupar North is identified as strategic development area, and includes the provision of bulky goods retailing (Policy 4, Table 1).

The next TAYplan is currently at the early stages of development. The Main Issues Report was published for consultation in April 2014, with further consultation to follow.

2.3 Local Policy

The Fife area is covered by three adopted local plans:

- Dunfermline & West Fife Local Plan (November 2012)
- Mid Fife Local Plan (January 2012)
- St Andrews & East Fife Local Plan (October 2012)

All three local plans are reflective of Scottish Planning Policy in that they support the hierarchy of the retail centre network and the sequential approach for the location of new retail development.

2.3.1 Dunfermline & West Fife Local Plan

The Local Plan encourages retail growth in Dunfermline, which is identified as a sub-regional shopping centre. Other key proposals within the plan include retail growth in Inverkeithing, Kincardine, Dalgety Bay and Rosyth as local shopping areas.

2.3.2 Mid Fife Local Plan

Kirkcaldy is Mid Fife's principal town, and is the main focus for retail development. The Local Plan also indicates that retail growth will be directed to Glenrothes, Cowdenbeath and the Levenmouth area.

2.3.3 St Andrews & East Fife Local Plan

St. Andrews and Cupar are identified as 'District Town Centres' in the local plan and are the main focus for retailing in the area. St Andrews is one of the town centres in Fife regarded as key to Fife's economic growth. Its retail role is identified as serving more visitor and tourism needs, but with an emphasis on quality. Cupar is identified as the service centre for much of rural East Fife. The Local Plan proposes additional development in the town to enhance this function. This includes a new retail park to accommodate bulky goods retail to complement the retailing available within the town centre.

2.3.4 Proposed FIFEplan Local Development Plan

The three adopted Local Plans covering Fife shall be replaced by a single Local Development Plan (LDP) called FIFEplan. This was issued for consultation in October 2014. Together with TAYplan and SESplan strategic development plans, it will form the statutory Development Plan for Fife once adopted.

In terms of town centres and retailing, the proposed FIFEplan notes that Fife Council has developed Business Improvement Districts (BIDS) in Kirkcaldy and Dunfermline and a similar approach is being considered in St Andrews. The aim of the BIDS is to help develop and strengthen the town centres as hubs of activity so they can remain centres for commercial, community, and cultural activity.

A Town Centres First policy (Policy 6) is included in the proposed FIFEplan, supporting Fife's town centres as the locations of choice for new shopping, commercial, leisure, entertainment, and leisure uses. This is strong policy approach to supporting and investing in the development of town centres and is wholly in line with the approach advocated in SPP. For the town centres and out of centre commercial centres, the plan proposes town centre and commercial centre frameworks, specifying the types of uses that would be appropriate in each centre. All proposals must comply with these frameworks.

A key change in the proposed FIFEplan is that the sequential approach will be applied at the retail market area level to reflect Fife's three retail catchment areas of East Fife, Mid Fife and West Fife, rather than the individual town level, using defined thresholds of gross floorspace for different land use class types. This is set out in Table 6.3 of the plan as a guide to the scale of development. For example, for convenience and comparison retail floorspace, the plan notes that extensions or changes to the restricted use of existing retail units of 1,000 square metres or more will also be subject to the sequential test. Retail Impact Assessments will be required for retail and leisure developments of more than 2,500 square metres gross floor area outwith a town centre where the site is not identified for a retail or leisure use in the Local Development Plan. The plan states that in other town centres, the focus will be on maintaining the existing retail provision. Any proposals for a change of use away from retail will be resisted, unless the building in question has been out of use for more than two years. In such cases the Council will require evidence of effective marketing for retail use over that period.

The commitment to the town centres first approach is continued in the policy approach to Fife's four out of town commercial centres. The plan states that the expansion of commercial centres beyond the current limits of their consents will not be supported during the lifetime of the Plan. It proposes that new development in commercial centres will be limited to the sale of bulky/DIY comparison goods or commercial leisure developments.

Overview of Trends in Retailing

To put our assessment into context and inform our advice on the capacity for additional retail floorspace in the study area, this section provides an overview of the current retail market and social trends experienced in the UK. These trends set the context for the retail environment at a local level, and therefore affect the development of future local shopping patterns. Our review draws on published data sources, including research by Experian and Verdict.

3.1 Economic Outlook

Advice published by Experian (Retail Planner 11, October 2013) identifies that the UK economy has continued to struggle following the recession as a result of weak domestic demand, declining disposable incomes, low levels of investment and reduced government spending. The consensus outlook for the medium term is for annual average GDP growth of about 2.4% over the next five years, which is slightly below the long term trend rate and less buoyant than before the recession. This is primarily due to pressure on government finances, weak bank lending and high household debt. Over the longer term the rate of economic growth is predicted to improve slightly, however due to continuing fiscal restraint this growth is likely to be constrained.

The economic downturn is still having a significant impact on the retail sector. A number of national operators have collapsed (e.g. Comet, HMV, JJB Sports, Blockbuster, Game, Land of Leather, MFI, Peacocks and Woolworths), leaving empty units within town centres and retail parks. However, the economic outlook improved in 2013 and Experian expects that as inflation continues to ease steadily, and output and employment growth accelerate, household finances will gradually improve and retail spending growth will increase.

Some of the main food store operators have seen a reduction in growth, with planned schemes delayed or abandoned. The principal large foodstore operators are developing fewer new stores, and those built tend to be of a smaller scale than the superstores that typified development in the past decade. The increased popularity of the 'deep discount' operators such as Aldi and Lidl is resulting in the other principal food operators focussing attentions on competing in this budget sector.

3.2 Growth of the Internet and New Forms of Retailing

New forms of retailing have continued to grow as an alternative to shopping in town centres and retail parks. The way in which goods are purchased by households has altered with the growth in the use of personal computers, smart phones and the internet. The number of households with internet access has risen from 57% at 2006, to 77% at 2011, 80% at 2012 and 83% in 2013¹. A total of 21 million households in Great Britain now have internet access, an increase of 7.1 million since 2006. Experian (Retail Planner Briefing Note 11, October 2013) identifies that there are 52.7% internet users in the UK, representing 84.1% of the population. Verdict predicts that by 2026 £1 of every £7 (14.3%) spent in the UK will be online.

Smart phone technology, Apps, QR (Quick Response) codes, internet-connected glasses and other technological advances are set to increase the proportion of shopping transactions undertaken remotely. Trends within this sector will have implications for retailing across Fife and people must be further incentivised to step outside their homes to spend, meaning that town centres need to provide a more attractive offer. The NEMS 2009 Fife Household Survey identified that some 58% of Fife's residents are already using Special Forms of Trading (SFT) for convenience and comparison shopping, accounting for about 7% of all convenience and comparison spend made by Fife households.

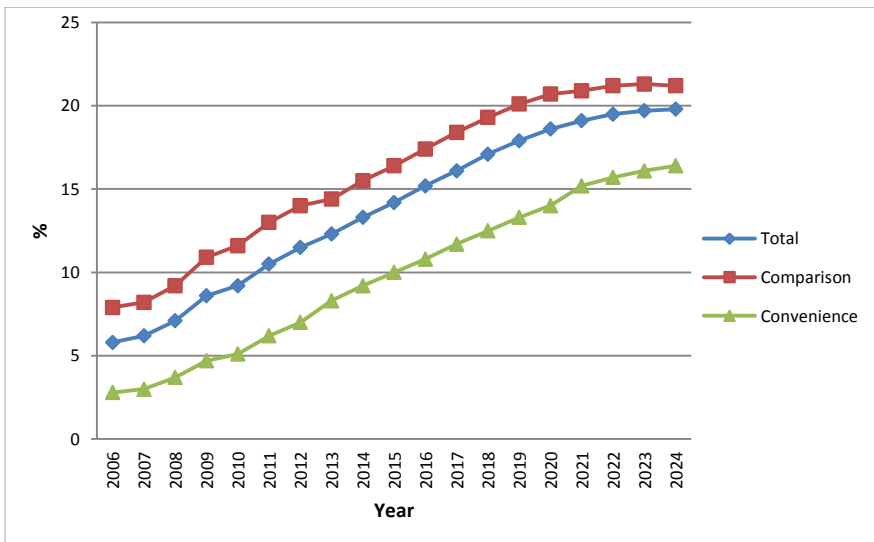
¹ Statistical Bulletin: Internet Access Households and Individuals, Office for National Statistics, August 2013

The increased popularity of ‘e-tailing’ as well as emerging forms such ‘m-retailing’ and ‘omni’ channel retailing² means that retail facilities need to be flexible to accommodate the increasing demands of modern shoppers for 24 hour flexibility and convenience.

Food retailers are developing and operating so-called ‘dark stores’, from which goods are picked and delivered, but there is no access to the public. This differs from the popular ‘click and collect’ shopping, where a customer orders their goods online, and then collect the items at their local store. Retailers including Marks & Spencer, Argos and Next are incorporating ‘click-and collect’ services into their stores, allowing customers to collect and return their goods ordered online. Experian considers this to be the key driver of current and future internet growth.

Experian has reviewed its forecast growth rates for both convenience and comparison goods expenditure. For convenience goods, Experian estimates that in 2006 only 2.8% of all expenditure was through non-store means (principally the internet), rising to 6.8% in 2012. Currently Experian estimates that non-store expenditure will rise to 15.7% by 2029. For comparison goods Experian estimates that in 2006 7.9% of all comparison goods expenditure was spent through non-store means, rising to 13.2% in 2012. By 2029 it is predicted that this will rise to 21.4%.

Figure 3-1: Estimated and Projected Market Share of Non-store Retail Sales



Source: Experian Retail Planner Briefing Note 11 (October 2013)

Experian’s Retail Planner Briefing Note 11 (October 2013) states:

“Non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in midyear 2012 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 17.4% by 2020 rising to 20% by the end of the 2020s.”

The implications of this on the demand for convenience and comparison retail space are unclear. For example, some retailers such as foodstore operators operate on-line sales directly from the stores’ shelves and distribute goods to customers’ homes, rather than from a purpose built distribution centre.

² E-tailing is shopping undertaken electronically, M-tailing is shopping undertaken through a mobile internet device, and OMNI relates to multichannel retailing, encompassing a seamless approach to the consumer experience through all available channels (such as mobile internet devices, computers, bricks and mortar, television, radio etc.)

Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace and as such, the impact of SFT on the convenience goods market may be less pronounced.

Experian's forecast annual per capita convenience goods growth rate is now -0.6% at 2013, -0.3% at 2014 and +0.1% at 2015³. Forecast annual per capita comparison goods growth rates are more positive than in previous years, with growth of +3.2% forecast at 2013, +2.3% at 2014 and +2.8% at 2015 and 2.9% thereafter. Whilst these increased forecasts are encouraging and show signs that confidence in spending is returning, it is evident that these forecast growth rates are still well below the annual growth (4% to 6%) which was recorded prior to the economic downturn but they do show increased signs of stabilisation.

3.3 Convenience Sector Trends

Over the last ten years, foodstore operators have had a rolling programme of store extensions and reinvigoration, particularly Asda, Sainsbury's and Tesco. However since the recession, some of the main food store operators have seen a reduction in growth, with planned schemes delayed or abandoned. The principal large foodstore operators are developing fewer new stores, and those built tend to be of a smaller scale than the superstores that typified development in the past decade.

The main foodstore operators, faced with potential saturation in the grocery market, attempted to increase the sale of non-food products within their foodstores, including clothing and electrical goods. The recession has halted this trend and it is now in reverse, helping to explain why consolidation and down-sizing strategies are being employed by the foodstore operators. Since 2012, Tesco in particular has concentrated on refreshing its existing stores, rather than pursuing new build. The increased popularity of the 'deep discount' operators such as Aldi and Lidl is also resulting in the other principal food operators vying to compete in this budget sector.

3.4 Comparison Sector Trends

Comparison retailers have also responded to recessionary market conditions. The bulky goods retail warehouse sector has rationalised and operators have scaled down store sizes, amidst a climate of mergers and failures. Other traditional high street retailers such as Boots and TK Maxx, have sought large out-of-centre stores. The charity shop sector has grown steadily over the past 20 years and it appears that this trend is set to continue. The discount comparison retail sector has also grown significantly with major expansion from the likes of Home Bargains, B&M Bargains, Poundland and Poundstretcher.

³ Experian Retail Planner Briefing Note 11, October 2013, Figure 1a

Fife Retail Market Overview

This section of our report considers the retail development activity in each of the three catchment areas. For the main towns, our research is advised by PMA Promis Retail Reports and discussions with retail property agents active in the respective town centres

4.1 West Fife

The area of West Fife includes the main towns of Dunfermline, Cowdenbeath, Inverkeithing and Dalgety Bay. Dunfermline is the largest retail centre but has to compete strongly with centres such as Livingston, The Gyle and Edinburgh city centre, all of which are within a 30 minute drive time.

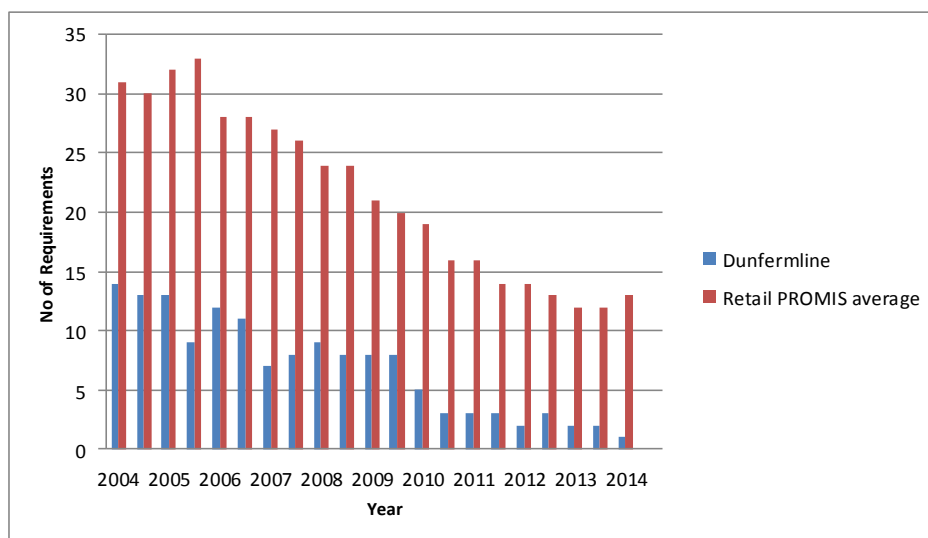
Online retail giant Amazon recently opened the UK's largest fulfilment centre here and many big businesses are setting up in the area. The nearby port at Rosyth has also developed into one of Scotland's most popular cruise terminals, providing Dunfermline with an international context, demonstrated by the fact that tourism expenditure in the area generated over £73 million in 2012⁴.

Although the attractiveness of the town centre has been enhanced by the city's rich historic background, Dunfermline ranks 148 on the basis of the PMA Retail Score (Rank out of 200, 1=best).

The Kingsgate Shopping Centre owned by Crosslands Ltd was recently extended and is one of the largest in Fife with 372,000 sq. ft. of floorspace and 74 outlets. Retail anchor stores include Debenhams, Marks and Spencer and Primark. Prime rental yields in Dunfermline stood at 7.75% at mid-2014, showing no change on the level six months previous.

The development of the Tesco supermarket at Carnegie Drive will help bolster the town centre which over the last year has seen a low demand for new retail units for a town of its size, with only one reported requirement in 2014, against a UK average of 13.

Figure 4-1: Dunfermline Retailer Requirements



Source: Egi

4.2 Mid Fife

The Kingdom Shopping Centre in Glenrothes is the largest indoor centre in Fife offering a mix of high street and specialist stores under one roof. It was acquired by LaSalle Investment Management (La Salle IM) in 2013 and with this came a renewed focus on reinvigorating the town centre. The town of Glenrothes ranks 164 on the basis of its PMA Retail Score (Rank out of 200, 1=best). Vacancy rates

⁴ PMA Promis Retail Report, September 2014

remain reasonably high within the centre and there are a number of temporary lets and local operators. With the closure of the Co-op foodstore, the two large empty Co-op units at either end of the centre at Albany Gate and Marchmont Gate offer redevelopment opportunities.

Over the last year, LaSalle IM reports more activity on the ground with a slow stream of new lettings such as Café Aroma and women's clothing retailer Krush and are investing heavily in new signage and internal refurbishment.

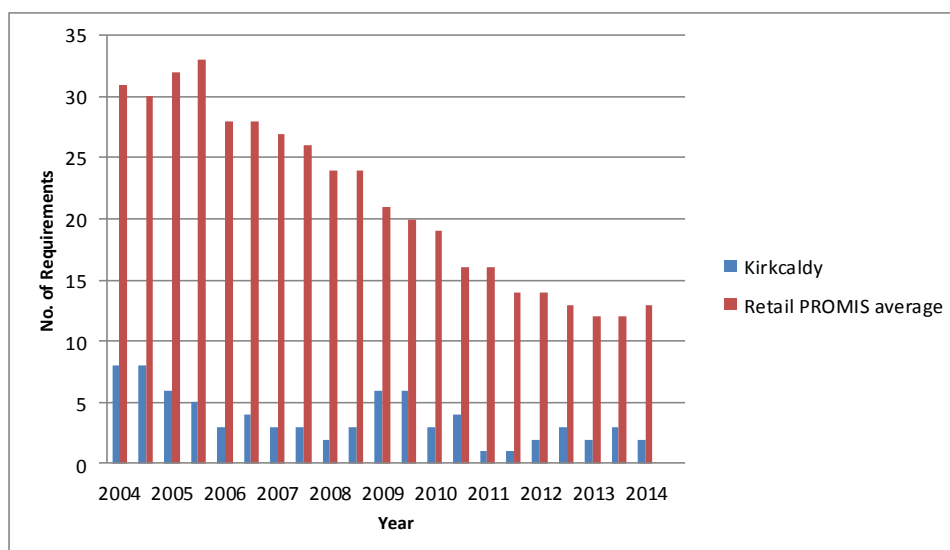
Kirkcaldy ranks 136 on the basis of its PMA Retail Score (Rank out of 200, 1=best). In recent years the town centre has seen significant improvements with enhancements to the seafront as well as its main shopping and visitor areas. Seven hundred businesses in Kirkcaldy's town centre generated nearly £600 million in turnover in 2013 and sustained 6,350 jobs⁵. The Mercat Centre, also owned by LaSalle IM is anchored by Marks and Spencer, TK Maxx and BHS. The introduction of the 1,579 sq. m Poundland store was a boost to the centre along with the JD Sports unit near the High Street entrance, the latter being one of only two stores that the retailer opened in Scotland last year. A number of new lettings have been announced in the Mercat Centre including Blue Inc, Krush and West Coast, all of which will be opening new stores during 2015. However the town centre faces strong competition from the out of centre Fife Central Retail Park with LaSalle advising that lower rents, free car parking and the absence of high service charges make the out of centre location attractive to new and existing retailers.

At Fife Central Retail Park, occupiers and owner Hammerson have sought relaxation of restrictions on the range of goods on a number of units. Next's proposals for its first large Home and Fashion store in Scotland have seen it take over the Poundland unit and former JJB and Comet stores. An integrated coffee shop has also been introduced at first floor level within the Next unit.

In 2014, Homebase announced its store will cease trading at some point in the near future and Hammerson has submitted a planning application for a Marks and Spencer Simply Food outlet, stating that this would serve a different market sector than that currently served by the existing M&S foodhall in the Kirkcaldy town centre store.

In mid-2014, there were only 2 reported retailer requirements for Kirkcaldy, reflecting a relatively low level of demand for a town of its size and status.

Figure 4-2: Kirkcaldy Retailer Requirements



Source: Egi

4.3 East Fife

St Andrews is the principal town in East Fife and remains one of Scotland's most popular locations as a place to live. The development strategy is to expand the town over the next 20 years to realise the

⁵ Investing in Fife's Town Centres, Invest in Fife, Fife Council 2014

potential of tourism and the University as economic drivers for Fife. A planned Business Improvement District (BID) for the town is in the process of being established for local businesses to work together and invest in improvements not publicly funded in their area.

There is no historic retailer requirement data for the town centre but property agents active in the area advise that shops in St Andrews don't lie empty for long compared to other towns in Fife such as Kirkcaldy and Dunfermline. The town centre streets of North Street, South Street and Market Street have a good range of high street and independent shops and even the charity shops in the town trade well. New retailers in the town include Jo Malone on Bell Street, Pret A Manger and Sam Brown clothing outlet on Market Street. Tourism expenditure brings in some £97.6 million per annum⁶ and this helps to sustain the town centre shops, cafes and restaurants.

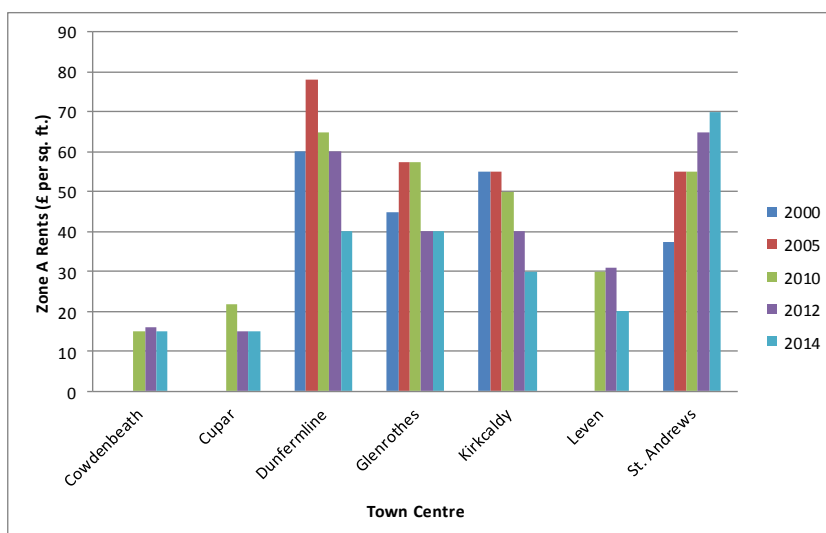
Key new development out of centre is the planned redevelopment of the abattoir buildings by Crucible (St Andrews) Limited for a Premier Inn and 1,395 sq. m gross (907 sq. m net) Marks and Spencer Simply Food outlet. This commenced on site at the end of 2014. There is also the planned eastern expansion of the town which will see the addition of 1,000 new homes and a 10 ha Science and Employment Park over the next few decades.

In Cupar, the planned 1,587 sq. m gross (1,140 sq. m net) Aldi supermarket on South Road is due for completion in summer 2014.

4.4 Zone A Retail Rents

Prime rents in Fife's main towns have decreased slightly on the end of 2013 level with most remaining around 30% below the pre-recession peak. The absence of development activity in the main towns is forcing rents down and increasing the number of vacancies. Landlords are increasing flexible with rents in order to secure a tenant but rate bills have not declined. Property retail agents advise that high rates are a significant barrier to profitable trading in many of Fife's town centres. Prime rents in Kirkcaldy are estimated by agents at £45 per sq. ft. Zone A. This represents a decline on the end 2013 level of prime rents in the town with rents now 25% below the pre-recession peak of £60 per sq. ft. Zone A. Similarly in Glenrothes, prime rents were down to £35 per sq. ft. Zone A. The chart below shows the trend in Zone A retail rents over the last five years with the notable difference of St Andrews with its increasing Zone A rents of £65-70 per sq. ft.

Figure 4-3: Zone A Retail Rents in Fife Town Centres



Notes:

1. Source: Ryden 2000-2012 (Fife Retail Capacity Study December 2012) and SGM Property Consultants 2014

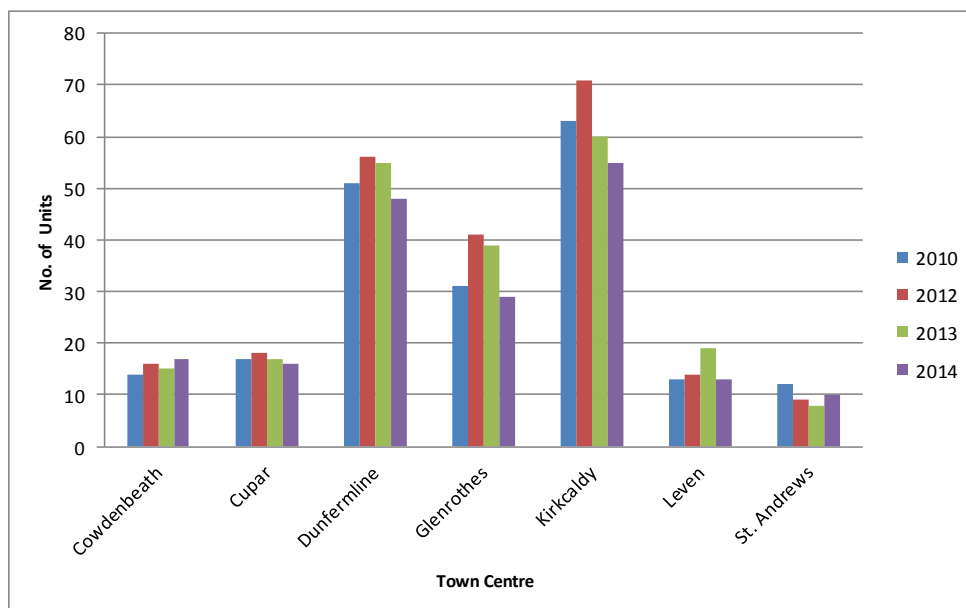
⁶ Investing in Fife's Town Centres, Invest in Fife, Fife Council 2014

4.5 Vacant Retail Units

A 2014 report on Scotland's top 100 cities and towns by The University of Stirling's Institute for Retail Studies and The Local Data Company (LDC) Report states that in general, the number of empty shops on Scotland's high streets has fallen over the last year. The average retail vacancy rate fell from 14.5% to 13.7%, with town vacancy rates improving at twice the rate of the cities.

Research undertaken by GVA James Barr⁷ reveals that whilst the amount of vacant floorspace has generally reduced, there has not always been a corresponding uplift in the quantum of retail floorspace. This suggests there has been some conversion of former retail floorspace to nonretail/service uses indicating a diversification of centres away from being purely retail-orientated destinations.

Figure 4-4: Town Centre Vacant Retail Units in Fife 2010-2014



Notes:

1: Source: Goad 2013, 2014 and Fife Retail Capacity Study December 2012

2: Refers to vacant retail/service outlets. Excludes vacant pubs, restaurants and takeaways

4.6 Developments/Commitments

Since the 2013 study was undertaken a number of retail developments have been implemented that will change projected capacity for new retail floorspace. There are also retail commitments in the pipeline that also need to be taken into account. These proposals/changes include:

- Tesco's proposals for a new 4,461 sq. m gross (3,192 sq. m net) foodstore at Carnegie Drive in Dunfermline and a new 3,372 sq. m gross (2,136 sq. m net) foodstore at Leven
- A replacement Tesco foodstore in Cupar
- Vico Properties proposals for a new 4,300 sq. m gross (2,573 sq.m net) supermarket in Cowdenbeath
- Aldi's proposals for two 1,587 sq. m gross foodstore in Cupar and Stenhouse Street in Cowdenbeath and a 206 sq. m gross extension to the existing Aldi at Flemington Road, Glenrothes
- A 379 sq. m gross foodstore at the New Bridge Tavern, Glenwood Centre site in Glenrothes
- The Kingslaw Village and Burnside neighbourhood proposals which include a 1,500 sq. m gross supermarket
- A 2,323 sq. m gross supermarket at the South Fod Neighbourhood Centre, Dunfermline
- Ashleigh (St Andrews) Limited's proposals for a 1,395 sq. m gross (907 sq. m net) Marks and Spencer 'Simply Food' store at Largo Road, St Andrews

⁷ Scottish Town Centres Annual Review, April 2014, GVA James Barr

The retail capacity analysis in this report takes these developments and commitments into account, and the retail floorspace projections are over and above these schemes.

Quantitative Assessment Methodology and Data

5.1 Introduction

This section sets out the broad methodology used in assessing the quantitative capacity for convenience and comparison goods in Fife up to 2024. In accordance with the Council's brief, we have broken down our assessment of comparison goods need into 'bulky' and 'non-bulky' floorspace⁸. We have used a conventional and widely accepted step by step methodology, consistent with best practice, which draws upon the results of the NEMS Household Telephone Survey (2009) of shopping patterns in Fife to model the flows of available expenditure to the three catchment areas.

The Study utilises the following methodology:

- Assess population increase over forecast period to 2024
- Assess residents' expenditure on convenience/comparison goods
- Calculate total available convenience/comparison goods expenditure
- Review residents' existing shopping patterns and flows of expenditure using 2009 NEMS Household Telephone Survey to establish the proportion of expenditure which is currently retained by the three catchment areas – that is, the current retention rate
- Review the trading level of existing stores
- Allow for 'claims' on the growth in retained expenditure as a result of:
 - floorspace efficiency change (that is the growth in turnover of existing retailers within existing floorspace)
 - growth over time in NSRT, mainly e-tail growth
 - planning commitments
- Utilising the information from the above steps, calculate the initial residual expenditure capacity which is potentially available for additional convenience and comparison goods floorspace

Population forecasts are provided by Experian along with the most recent information on local retail expenditure, as well as recommended deductions for non-store forms of retailing (e.g. internet) and recommended growth rates based on national expenditure patterns.

Experian is a widely accepted source of expenditure and population data and is regularly used in calculating retail capacity. Oxford Economics and Pitney Bowes are the two other companies that annually publish expenditure growth forecasts. Experian updates all its forecasts at least one a year in its Retail Planner Briefing notes and use an in house UK leading Economics team to support the data build and its accompanying briefing notes. Comparatively, the 2013 Fife Retail Capacity Study (2013 FRCS) was based on data and forecasts from the Pitney Bowes Retail Expenditure Guide 2013-2014. Whilst the Pitney Bowes and Experian methodologies are similar in that they both use the Living Cost and Food Survey, there are slight variations in the forecasts. Some of these main differences in forecasts and the resultant figures will be highlighted in this report.

The current performance of convenience and comparison goods floorspace across Fife is then used as the basis for forecasting the need for additional retail floorspace up to 2024.

It is important to note that capacity forecasts become increasingly open to margins of error over time and will be influenced by potential changes in economic circumstances. The longer term projections in this study to 2024 should therefore be treated with caution. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long term are reflective of any changes to relevant available data. The quantitative assessments are set out in detail in Appendix B for convenience goods and Appendix C for comparison goods.

⁸ As defined by Experian Retail Planner Briefing Note 11 (October 2013), Appendix B, bulky goods are defined as DIY goods, furniture and floor coverings; major household appliances whether electric or not; audio-visual equipment; 10% of non-durable household goods and bicycles). Non-bulky goods are all other comparison goods (excluding 90% of non-durable household goods, which are included within the 'convenience goods' category).

5.2 Price Base

All monetary values expressed in this study are at 2012 prices.

5.3 Catchment Area

We have adopted the overall catchment area and 3 study zones used in the 2013 FRCS which are based on the findings of the NEMS Household Telephone Interview Surveys undertaken in 2009 (commenting where appropriate on changes that have occurred since).

A map of the Study Area is provided in Appendix A. The study area is postcode sector based and as such does not follow administrative boundaries precisely. Table 5-1 sets out the postcode areas which comprise each of the three catchment areas. As advised in the Council's previous Retail Studies (2012 and 2013), it is important to note that the three catchment areas differ slightly from the boundaries of the three local plan areas. The key differences are the inclusion of Cowdenbeath/Kelty in the West Fife retail catchment and Falkland/Ladybank in the Mid Fife retail catchment.

Table 5-1: Catchment Area Postcode Sectors

Catchment Area	Constituent Postcode Sectors
West Fife	KY4 0/8/9, KY5 0, KY5 8/9, KY11 1/2/7/9, KY11 3/4/8, KY12 0/7/8, KY12 9, FK10 4, KY2 5/6, KY3 0/9
Mid Fife	KY15 4/5, KY15 7, KY6 1/2/3, KY7 4/5/6, KY1 1/2/3/4, KY14 6/7, KY8 1/2/3/4, KY8 5/6
East Fife	KY16 0/8/9, DD6 8/9, KY10 2/3, KY9 1

Notes:

1. Postcode sector data taken from NEMS market research, Fife Household Survey, October 2009
2. In West Fife, FK10 3 has been removed and the population of Clackmannan has been excluded from FK10 4

5.4 Population

Population change is one of the most basic drivers of changes in consumer demand. The population forecasts provided by Experian consist of data from the 2011 Census, 2001 Census, 2012 based Population and Households Estimates, Population and Household Projections and Mosaic UK. For Fife, Experian used 2010 based projections. For the purpose of this Study, population and expenditure has been calculated at five year intervals to 2024 (i.e. at 2014, 2019, and 2024) (Table 1 in Appendices 1 and 2).

The 2013 FRCS was based on Fife Council's projections from the KnowFife Dataset – Fife Retail Capacity Study 2012 (with the total for Fife Council from the 2011 Census and the three catchment area populations apportioned from this).

The population projection for the whole of Fife at 2019 is 379,357, about 2% higher than the 2014 projection (370,942). Over the study period 2014 to 2024, there is a projected growth in population of 16,121 compared to a figure of 9,388 for the ten year period 2013-2023 reported in the 2013 FRCS. Table 5-2 provides a detailed breakdown of the forecast population change within each catchment area in each of the reporting periods to 2024.

Table 5-2: Catchment Area Population Projections

Catchment Area	2014	2019	2024	Growth 2014-24
West Fife	125,960	128,908	131,649	5,688
Mid Fife	177,437	181,449	185,072	7,635
East Fife	67,545	69,000	70,343	2,798
Total Fife	370,942	379,357	387,064	16,121

Notes:

1. Population data from Population and Expenditure Data Report from Experian Retail Planner' dated 28/05/14 for East Fife, Mid Fife and West Fife

5.5 Retail Growth and Special Forms of Trading

In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local Fife catchment population.

The base year for the Experian expenditure data is 2012. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 11, which was published in October 2013. Forecast growth rates have been adopted as these represent a prediction of how retail expenditure is estimated to grow, rather than being based on past trends. Trend-based growth rates have been more appropriately used in the past, when there was greater confidence in past trends continuing. It is considered that trends prior to the recession are unlikely to be replicated in the future due to the current economic uncertainty and the lack of available credit that has fuelled recoveries in consumer spending in the past.

Table 5-3 summarises and compares the forecasts between 2012 to 2024 from Pitney Bowes Retail Expenditure Guide 2013-14 (used in the 2013 FRCS) and Experian Retail Planner Briefing Note 11, October 2013.

Table 5-3: Forecast % increases in Consumer Expenditure

Year	Convenience Goods		Comparison Goods	
	Pitney Bowes	Experian	Pitney Bowes	Experian
2012	0.6	-0.6	3.7	3.1
2013	0.6	-0.6	3.7	3.2
2014	0.6	-0.3	3.7	2.3
2015	0.6	0.1	3.7	2.8
2016	0.6	0.6	3.7	2.9
2017	0.6	0.9	3.7	2.9
2018	0.8	0.8	3.7	3.1
2019	0.8	0.9	3.7	3.1
2020	0.8	0.9	3.7	3.0
2021	0.8	0.9	3.7	3.0
2022	0.8	0.9	3.7	2.9
2023	0.8	0.9	3.7	2.9
2024	0.8	0.9	3.7	2.9
	9.2%	6.3%	48.1%	38.1%

Experian's growth forecasts suggest that the current downturn in the economy will continue to impact upon future convenience goods expenditure, at least in the short term. However, over the medium to long term it is expected that the forecast levels of growth will increase as the economy recovers.

For comparison goods, Experian identifies an immediate and relatively strong annual comparison growth rate of +3.1% and +3.2% at 2012 and 2013 respectively. Whilst a drop in the rate of growth is anticipated at 2014 (to +2.3%), growth rates thereafter are forecast to be relatively stable, ranging from +2.8% to +3.1%. These figures compare to the Pitney Bowes forecast 3.7% annual growth rate for comparison goods that was identified in the 2013 FRCS for the period 2012-23, demonstrating a reduced forecast over the study period.

Experian Retail Planner Briefing Note 11 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising Non-store Retail Trade (NSRT)

such as internet sales, TV shopping etc.) over the reporting period. The proportion of expenditure accounted for by NSRT for convenience goods is shown in Table 2.2 of Appendix B and for comparison goods in Table 2.2 of Appendix C.

5.6 Convenience Goods Expenditure per Head

Tables 2.1 and 2.2 of Appendix B set out the expenditure per head of residents within the three main catchment areas. Table 2.1 sets out the total expenditure of residents on convenience goods each year, and Table 2.2 discounts Non-Store Retail Trade (NSRT). NSRT is principally expenditure through the internet but also through markets, catalogues, vending machines and door to door sales. This percentage deduction for each year is taken from Experian's Retail Planning Briefing Note 11 published in October 2013⁹.

5.7 Total Available Convenience Expenditure

Using the above growth rates and NSRT allowances, it is possible to produce total available expenditure estimates for each catchment area at 2014, 2019 and 2024. Table 3 of Appendix B sets out the total amount of convenience expenditure available in each of the three catchment areas. This is achieved by multiplying the population of each of the zones (from Table 1) by residents' expenditure per head excluding NSRT (Table 2.2).

There is £758.67m available within Fife as a whole in 2014 and a growth in expenditure of £73.44m over the period 2014-2024.

5.8 Comparison Goods Expenditure per Head

Tables 2.1, 2.2, 2.3 and 2.4 of Appendix C set out the comparison expenditure per head of residents within the three main catchment areas. Expenditure per head on bulky goods has been shown separately as per the study brief requirement. Tables 2.2 and 2.4 discount Non-Store Retail Trade (NSRT) for all comparison goods and bulky goods only respectively and show the proportion of expenditure accounted for by NSRT means.

5.9 Total Available Comparison Expenditure

Using the growth rates and NSRT allowances Tables 3.1 and 3.2 of Appendix C set out the total available comparison and bulky goods expenditure in each of the three catchment areas. This is achieved by multiplying the population of each of the catchment areas (from Table 1) by residents' expenditure per head excluding NSRT (Tables 2.2 and 2.4).

For the period 2014-2024, there is a growth in comparison goods expenditure potential of £319.11m and for bulky goods, a growth in total available expenditure of £80.89m.

5.10 Market Share of Expenditure

To assess the capacity for new retail floorspace, the market share and penetration rates are estimated for shopping facilities within the three catchment areas based on information gathered through the 2009 NEMS household survey. We have 'rolled forward' the current estimated market share in the three catchment areas for each category of goods up to 2024. This approach of rolling forward existing market share is in line with standard practice and does not take into account the need to 'claw back' leakage from expenditure directed to centres elsewhere, which might be achieved through improvements in retail provision or offer. We have considered separately the potential effects on residual expenditure capacity through a 'claw back' of leakage as part of sensitivity testing on both convenience and comparison goods.

It is recognised that where people choose to shop for convenience and comparison goods may well have changed since 2009 when the household survey was undertaken, as new retail floorspace has been developed. The attractiveness of competing centres such as Livingston, The Gyle, Edinburgh and Dundee

⁹ In line with guidance from Experian, the deduction does not include goods that are ordered online but collected or delivered from physical stores and is therefore transacted through the tills of these stores. It does however include means such as Ocado or 'dark' stores and warehouses where access to the public is not available.

will undoubtedly have continued to attract shoppers out of Fife, particularly for comparison and bulky goods purchases. We have therefore made best judgement local adjustments to the net flows of expenditure to reflect these changes. This was also the approach taken in the 2013 FRCS. The true effects of shopper preferences to competing retail locations can only be ascertained by a fresh household telephone survey. Our assumptions on market share are shown in Table 5 of Appendix B for convenience goods and Tables 5.1 and 5.2 of Appendix C for comparison and bulky goods respectively.

5.11 Benchmark Turnovers and Turnover Efficiency

Turnover figures for relate to the estimated average turnover generated by existing retail facilities within the three catchment areas. In tandem with the 2013 FRCS, we have calculated the turnover of existing facilities using average sales densities rates from the Mintel Retail Rankings 2013, with adjustments to include VAT and remove petrol/ non-retail sales, expressed in 2012 prices. It should be noted that the Retail Rankings estimates are a combined turnover ratio for both food and non-food sales and our approach is to apply these average turnover ratios as the convenience turnover ratio only based on estimates of the split of convenience/comparison floorspace in each foodstore. The majority of these assumptions are as per the 2013 FRCS, unless otherwise stated.

We have made no adjustments to the total turnover in each catchment area about the level of over or under trading of stores. The benchmark turnovers are not necessarily the actual turnovers of the foodstores in the catchment areas, but they do provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms. Survey derived 'actual' turnovers are sometimes used as a comparison to national average (benchmark) turnovers, but in the absence of a recent household telephone survey to help inform this, sales densities across the stores in the catchment areas could have changed significantly as people's shopping preferences alter over time dependent upon current retailing provision. We recognise however that some stores may well continue to trade successfully above or below their company average sales density. As such, the retail capacity forecasts for 2019 and 2024 should therefore be seen as estimated ceilings, rather than targets which must be achieved through new retail development.

In terms of turnover efficiency, Experian suggests that there could be a reduction in convenience goods efficiency in the short term, then 0.1% per annum growth is recommended for the period 2021 to 2031¹⁰. The reduction in turnover efficiency in the short term is expected to cancel out longer term growth. Tables 4.1, 4.2 and 4.3 in Appendix B, assume that the benchmark turnover of convenience floorspace will increase by 0.1% per annum for 2021 to 2024; the resultant 2024 turnover being marginally lower than the 2014 position.

Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Tables 4.1, 4.2 and 4.3 of Appendix C therefore assume that comparison floorspace in the three catchment areas will increase their benchmark turnover in real terms. Retail sales density growth rates of 2.2% in 2015; 2.1% in 2016-2020 and 2% from 2021 to 2024 per annum are adopted as recommended by Experian¹¹.

5.12 Retail Commitments

Table 6 of Appendix B sets out the estimated turnover of convenience goods commitments over the study period. These have a total convenience goods turnover in 2014 of £89.29m.

Similarly, Table 6.1 of Appendix C sets out the estimated turnover of comparison goods commitments over the study period. These have a total comparison goods turnover in 2014 of £40.32m. We have also made judgements as to a likely level of bulky goods floorspace within the comparison commitments. This is shown in Table 6.2 in Appendix C.

¹⁰ Experian Retail Planner Briefing Note 11 (October 2013) Table 4a

¹¹ Experian Retail Planner Briefing Note 11 (October 2013) Table 4b

In discussion with Fife Council, we have not included a number of planning convenience and comparison retail consents as commitments due to the uncertainty of some proposals progressing. These applications and consents are shown in Table 7 of both Appendix B and 3 and are not treated as deductions from capacity.

5.13 Sensitivity Testing

We have assessed the following scenarios for sensitivity testing of the retail capacity forecasts:

Scenario 1 – the ‘baseline’ scenario, in which we assume that the 2014 pattern of market shares of convenience and comparison goods shopping in the three catchments of West Fife, Mid Fife and East Fife (as indicated by the 2009 NEMS household survey – as locally adjusted) remains unchanged throughout the forecasting period to 2024. The implicit assumption in this scenario is that any new retail development in these shopping catchments does not change the market shares of expenditure attracted from the catchment area. We have included the potential turnover of planning commitments for both convenience and comparison proposals as part of our testing under our baseline scenario. This methodology is akin to the 2013 FRCS ‘low estimate’ forecasts of capacity.

Scenario 2 – we assume new retail development in the three catchment areas has the potential to alter the balance of market shares by ‘clawing back’ some of the leaked expenditure (estimated through the NEMS household survey) from 2014 onwards. For convenience goods, we have modelled a ‘clawback’ of some 25% and 50% of the leakage and assessed the effect on the residual expenditure capacity. The 2013 FRCS assessed a clawback of leakage/attraction of new trade of 50% (high estimate tables). Any expenditure capacity has been converted into a quantum of net floorspace that could theoretically be supported. We have assessed levels of floorspace for both mainstream and discounter foodstores.

For comparison goods, we have modelled a ‘clawback’ of some 10% and 20% of leakage from West Fife and Mid Fife. For East Fife, we have assessed clawback at the lower levels of 5% and 10% given the existing nature of the comparison goods offer in the catchment area. Again, any expenditure capacity has been converted into a quantum of net floorspace that could theoretically be supported in each catchment area. We have assessed levels of floorspace for both town centre comparison goods retail provision and bulky goods provision.

Quantitative Capacity for Convenience Retail Floorspace

In this section we set out our retail convenience capacity forecasts for Fife's three catchment areas at the 2014 'baseline' year and throughout the forecasting period (i.e. 2019 and 2024).

The results of the capacity analysis are contained in the tables in Appendix B and the accompanying analysis below.

6.1 Scenario 1 - Baseline

Tables 8.1 to 8.3 in Appendix B set out the capacity for additional convenience goods floorspace in the three catchment areas of West Fife, Mid Fife and East Fife. This on the basis of the 'baseline' scenario, in which we assume that the 2014 pattern of market shares of convenience goods shopping in the catchment areas remain unchanged throughout the forecasting period to 2024.

Table 6-1 below is a summary of our baseline position setting out the convenience goods capacity identified within the three catchment areas and how this changes between 2014 and 2024.

Table 6-1: Summary of Expenditure Capacity for Convenience Goods Floorspace (£m)

Catchment Area	2014	2019	2024
West Fife	-£42.83	-£28.59	-£14.53
Mid Fife	-£28.60	-£11.15	£6.09
East Fife	-£11.82	-£6.25	-£0.69

Notes:

1. From Tables 8.1, 8.2 and 8.3 in Appendix B

The table shows that there is no requirement for additional convenience goods floorspace across the study period in either West Fife or East Fife. The catchment areas are served by large foodstores as well as a range of smaller convenience facilities which provide for more localised top up provision. There are also a number of outstanding commitments for new convenience goods floorspace which have not yet been built out (as per Table 6, Appendix B). Only in Mid Fife by 2024, is there a notional £6.09m to support additional convenience goods floorspace.

Residual expenditure capacity is converted to floorspace equivalent figures on two bases. The first is based on the likely floorspace requirements of the 'Top Four' foodstore operators (Tesco, Asda, Morrisons and Sainsburys) with an average turnover ratio of £11,607 per sq. m net (consistent with the 2013 FRCS). The second is based on the requirements of 'Discounter' operators (Aldi, LIDL, Iceland and Farmfoods) with an average turnover ratio of £6,109 sq. m net.

For Mid Fife in 2024, the residual expenditure capacity of £6.09m therefore converts into a net floorspace equivalent of 526 sq. m net for a 'top four' foodstore retailer or 999 sq. m net for a 'discounter' foodstore. Should any of the convenience goods commitments not come forward, or the approved schemes be amended to reduce the scale of the proposals, further capacity would of course be released.

6.2 Scenario 2 – Clawback of Leakage to 2024

Tables 9.1, 9.2 and 9.3 of Appendix B make an allowance for the 'clawback' of leakage in our Scenario 2 sensitivity tests. As noted in the previous section, for convenience goods, we have modelled a 'clawback' of some 25% and 50% of the leaked expenditure (derived from the NEMS 2009 Household Survey) from each of the three catchments and assessed the effect on the residual expenditure capacity.

Table 6-2 shows the potential for new convenience goods floorspace in each catchment with 25% clawback and Table 6-3 illustrates a 50% clawback of expenditure leakage.

As for Table 6-1, we have only shown quantum's of potential net floorspace where there is a positive residual expenditure capacity.

It is important to note that the capacity forecasts are cumulative, i.e. the forecasts of potential new floorspace for each date include the forecasts for the previous dates and are not additional to the earlier forecasts.

Table 6-2: Potential Capacity for New Convenience Goods Floorspace (sq. m net) with 25% Clawback

Catchment Area	At 2014		At 2019		At 2024	
	'Top 4' Equivalent	'Discounter' Equivalent	'Top 4' Equivalent	'Discounter' Equivalent	'Top 4' Equivalent	'Discounter' Equivalent
West Fife	0	0	0	0	0	0
Mid Fife	0	0	0	0	1,267	2,407
East Fife	0	0	325	618	849	1,613

Notes:

1. From Tables 9.1, 9.2 and 9.3 in Appendix B
2. Net floorspace quantum's are only shown where there is a positive residual expenditure capacity

Table 6-3: Potential Capacity for New Convenience Goods Floorspace (sq. m net) with 50% Clawback

Catchment Area	At 2014		At 2019		At 2024	
	'Top 4' Equivalent	'Discounter' Equivalent	'Top 4' Equivalent	'Discounter' Equivalent	'Top 4' Equivalent	'Discounter' Equivalent
West Fife	0	0	0	0	0	0
Mid Fife	0	0	447	850	2,007	3,814
East Fife	636	1,209	1,193	2,267	1,757	3,339

Notes:

1. From Tables 9.1, 9.2 and 9.3 in Appendix B
2. Net floorspace quantum's are only shown where there is a positive residual expenditure capacity

In West Fife, having allowed for implementation of commitments and either a 25% or 50% level of clawback of expenditure leakage, there is no additional floorspace capacity for the forecast period to 2024. This position remains unaltered from the 2013 FRCS conclusions.

In Mid Fife, with 25% clawback there is a nominal convenience floorspace capacity in 2024 rising more significantly with 50% clawback, suggesting an increased need in the catchment area over the medium to long term. This equates to a net convenience goods floorspace of between 447 sq. m and 850 sq. m at 2019, increasing to 2,007 sq. m and 3,814 sq. m at 2024.

Whilst there are a number of ways in which such identified needs can be met, food superstores usually provide upwards of 2,000 sq. m of convenience goods floorspace, and therefore the identified need could potentially support up to two discounter foodstores or an extension to a main superstore by 2024. Kirkcaldy's convenience retail offer has arguably been strengthened with the Morrisons new foodstore at the western end of the esplanade at Invertiel, whereas in centres such as Glenrothes and Leven, planning consents for new foodstores remain unimplemented. Smaller district and local town centres such as Lochgelly, Burntisland and Methil may also offer redevelopment opportunities where the adopted development plan supports town centre regeneration to help improve their vitality and viability.

In East Fife, with a 25% clawback, there is only marginal additional convenience capacity up until 2024, akin to supporting a main foodstore remodelling/extension or a discount foodstore. With a theoretical 50% clawback, the capacity equates to a net convenience goods floorspace of between 1,193 sq. m and 2,267 sq. m at 2019, increasing to 1,757 sq. m and 3,339 sq. m at 2024. The 2009 NEMS Household Survey identified significant convenience expenditure leakage from the Cupar/St Andrews zone (Zone D) in the order of 74% (73% of which goes to Dundee) and in the western edge of the catchment in Cupar/Glenrothes (Zone E) leakage of 45%, virtually all of which goes to Perth and Kinross. There may therefore be opportunities to help stem this outflow of expenditure through providing an improved convenience retail offer in these zones of East Fife (taking into account the existing committed developments as per Table 6, Appendix B).

As previously stated we have modelled our capacity analysis on benchmark (average) turnover ratios for existing convenience floorspace in the catchment area. We have not allowed for trade diversion or modelled for acceptable levels of retail impact on the existing provision, which would have the effect of releasing potential expenditure to support new floorspace. It is nonetheless likely that some of the larger foodstores in the main towns of Dunfermline, Kirkcaldy and Glenrothes could sustain a level of retail impact without threatening their overall viability. This would need to be tested in retail impact assessments for new convenience floorspace as planning applications come forward over the plan period.

For all the above capacity scenarios, as required by SPP and development plan policy, the sequential approach to site selection should be adopted. Proposals for new convenience floorspace should also be well located in relation to the communities they are intended to serve, should be accessible by public transport and should minimise the need for travel between settlements.

The 'need' for new floorspace has two principal indicators, the level of quantitative need identified and qualitative factors that may justify the provision of floorspace over and above the level of quantitative need. This retail study does not include a qualitative assessment of the town centres within each catchment area and accordingly, the quantitative assessment is just one element in considering the need for additional convenience provision. Any deficiencies in provision highlighted above are an important consideration to assure that new provision within the catchments promotes an equitable and more balanced convenience goods sector.

Quantitative Capacity for Comparison Retail Floorspace

In this section we set out our retail comparison capacity forecasts for Fife's three catchment areas at the 2014 'baseline' year and throughout the forecasting period (i.e. 2019 and 2024).

The results of the capacity analysis are contained in the tables in Appendix C and the accompanying analysis below.

7.1 Scenario 1 - Baseline

Tables 8.1 to 8.6 in Appendix C set out the capacity for additional comparison goods and bulky goods floorspace in the three catchment areas of West Fife, Mid Fife and East Fife. This on the basis of the 'baseline' scenario, in which we assume that the 2014 pattern of market shares of comparison goods shopping in the catchment areas remains unchanged throughout the forecasting period to 2024.

Table 7-1 below is a summary of our baseline position setting out the comparison goods capacity identified within the three catchment areas and how this changes between 2014 and 2024.

Table 7-1: Summary of Expenditure Capacity for Comparison Goods Floorspace (£m)

Catchment Area	At 2014		At 2019		At 2024	
	All comparison goods	Bulky goods	All comparison goods	Bulky goods	All comparison goods	Bulky goods
West Fife	£33.94	£49.73	£43.85	£57.62	£67.91	£69.93
Mid Fife	-£33.11	£42.02	-£28.47	£49.70	-£4.84	£63.14
East Fife	£8.51	£7.15	£11.10	£8.15	£17.80	£9.61

*From Tables 8.1, 8.2, 8.3, 8.4, 8.5 and 8.6 in Appendix C

As with the convenience capacity tables, the comparison capacity forecasts are cumulative, i.e. the forecasts of potential new floorspace for each date include the forecasts for the previous dates and are not additional to the earlier forecasts. Equally, the bulky goods forecasts are a component of the comparison goods figures and not in addition to the all comparison goods capacity forecast.

The forecast increases in comparison goods expenditure allow for year on year increases in the sales densities of existing floorspace, in line with the recommendations of Experian¹². This allows a substantial proportion of the £319.11m growth in expenditure over 2014 to 2024 (Table 3.1 in Appendix C) to support the existing shops and stores and allocates almost 49% of it to existing shops and just over 51% to new floorspace.

Table 7-1 also includes an allowance for the turnover of comparison goods commitments of approximately £6.83m for West Fife, £27.69 m for Mid Fife and £5.80m for East Fife in 2014. With the exception of the Saltire Retail Park extension and the Tullis Russell development in Glenrothes, the commitments are the same as for convenience goods, being the comparison goods elements of the same developments.

Tables 8.1 to 8.3 show any residual expenditure capacity converted to floorspace equivalent figures on the basis of a town centre average sales density for each catchment. We have adopted the same sales densities as suggested in the 2013 FRCS, as we consider these to reflect the nature and range of comparison goods offer in the catchments' main towns. For West Fife and Mid Fife, we have used a comparison goods turnover ratio of £4,700 per sq. m and for East Fife, a figure of £3,500 per sq. m. An

¹² Experian Retail Planner Briefing Note 11, October 2013 Table 4b

average of retail warehouse turnovers of £2,000 per sq. m is used as a benchmark figure to calculate potential capacity for additional bulky goods floorspace.

In West Fife, there is comparison goods capacity within the catchment area which grows substantially over the study period to 2024, this is having allowed for the growth in internet trading. By 2024 there is a notional residual surplus of some £67.91m to support 14,448 sq. m net of new comparison floorspace in town centres. This compares to a figure of £82.7m in 2013 identified in the 2013 FRCS. Comparison shopping in West Fife is dominated by Dunfermline, which retains 81% of comparison goods expenditure in Zone 7 (Dunfermline – 2)¹³.

In Mid Fife, there is no residual expenditure to support additional comparison floorspace. The 2013 FRCS identified a surplus of £126.6m in its low range forecast¹⁴. Our figures for Mid Fife differ from the 2013 FRCS due to the substantial forecast growth in sales densities of all retail facilities over the study period (as per Experian’s recommendations), giving Mid Fife a comparison goods total turnover of £484.27m compared to the 2013 FRCS figure of £376m. There has also been additional comparison goods development in the Riverside Retail Park with new entrants in the form of B&M Homestore and Home Bargains, and the occupation by Poundstretcher of a vacant unit at the Saltire Retail Park, adding £21.61m to the 2024 turnover position.

The Mid Fife comparison goods catchment is relatively well self-contained, with Kirkcaldy and Glenrothes dominating the retail provision. Kirkcaldy has the widest draw for comparison goods shopping, retaining 89% of shoppers from its immediate Zone B (Kirkcaldy/Glenrothes) and 85% of shoppers from Zone A (Kirkcaldy)¹³. Outside of Fife, Edinburgh is the second most popular destination for comparison goods shopping (Dundee is the first) and attracts shoppers from most areas of Fife.

In East Fife, there is residual expenditure surplus to support small new town centre floorspace ranging from 2,431 sq. m in 2014 to 4,144 sq. m net in 2024. These notional levels of floorspace would allow for some small scale redevelopment and/or shop refurbishments in East Fife’s main town centres. The NEMS 2009 survey showed that there is substantial leakage in East Fife amounting to some 80% for comparison goods and 85% for bulky goods. The northern most Zone D (Cupar/St Andrews) retains only 12% of comparison expenditure. Unsurprisingly Dundee is the major attraction and in the west of the catchment, shoppers are also drawn to Perth, with Zone E (Cupar/Glenrothes) retaining 34% of comparison expenditure¹³.

For bulky goods, Table 7-1 (and Tables 8.4, 8.5 and 8.6 of Appendix C) shows that there is notional bulky goods expenditure capacity within West and Mid Fife which grows substantially over the study period to 2024. Given the high residual capacity it is prudent to also consider the actual growth in bulky goods expenditure which has taken place during this period as the estimated sales densities for bulky goods floorspace could vary considerably from our estimations. This is shown in the Table 7-2 and would impact upon the available expenditure to support new floorspace.

Table 7-2: Bulky Goods Residual Expenditure Capacity Growth (£m)

Catchment Area	2014- 2019	2019-2024
West Fife	7.94	12.35
Mid Fife	7.68	13.43
East Fife	1.01	1.45

Notes:

1. From Tables 8.4, 8.5 and 8.6 in Appendix C

¹³ NEMS Household Survey, October 2009

¹⁴ Table 7.4 of 2013 Fife Retail Capacity Study

7.2 Scenario 2 – Clawback of Leakage to 2024

Tables 9.1 to 9.6 of Appendix C make an allowance for the ‘clawback’ of leakage in our Scenario 2 sensitivity tests. As noted in Section 5, for comparison goods, we have modelled a ‘clawback’ of some 10% and 20% of the leaked expenditure (derived from the NEMS 2009 Household Survey) from West and Mid Fife and slightly lower levels of clawback of 5% and 10% in East Fife and assessed the effect on the residual expenditure capacity.

Table 7-3 shows the potential for new comparison goods floorspace in each catchment with 10% clawback for West and Mid Fife and 5% clawback for East Fife.

Table 7-3: Potential Capacity for New Comparison Goods Floorspace (sq. m. net) with up to 10% Clawback

Catchment Area	At 2014		At 2019		At 2024	
	Mainstream comparison equivalent	Bulky goods equivalent	Mainstream comparison equivalent	Bulky goods equivalent	Mainstream comparison equivalent	Bulky goods equivalent
West Fife	8,991	25,878	10,206	26,978	13,677	29,572
Mid Fife	0	15,269	0	16,462	1,209	19,394
East Fife	3,366	3,727	3,807	3,830	5,147	4,083

Notes:

1. From Tables 9.1, 9.2 and 9.3 in Appendix C
2. Net floorspace quantum's are only shown where there is a positive residual expenditure capacity
3. 10% clawback for West Fife and Mid Fife and a 5% clawback for East Fife

Table 7-4 illustrates a 20% clawback of expenditure leakage in West and Mid Fife and a 10% clawback in East Fife.

Table 7-4: Potential Capacity for New Comparison Goods Floorspace (sq. m. net) with up to 20% Clawback

Catchment Area	At 2014		At 2019		At 2024	
	Mainstream comparison equivalent	Bulky goods equivalent	Mainstream comparison equivalent	Bulky goods equivalent	Mainstream comparison equivalent	Bulky goods equivalent
West Fife	10,760	26,659	12,011	27,783	15,583	30,429
Mid Fife	0	16,059	0	17,274	3,256	20,259
East Fife	4,300	3,882	4,759	3,989	6,150	4,252

Notes:

1. From Tables 9.1, 9.2 and 9.3 in Appendix C
2. Net floorspace quantum's are only shown where there is a positive residual expenditure capacity
3. 20% clawback for West Fife and Mid Fife and a 10% clawback for East Fife

The tables above show that assuming levels of clawback of up to 20% across the three catchments there is forecast comparison goods capacity, which grows substantially over the study period to 2024 to support new comparison floorspace.

This capacity forecast for Fife's town centres results from forecast growth in population and expenditure and will grow significantly throughout the period to 2024. However in practice, particularly in the case of Mid Fife, there is likely to be very little retailer demand for substantial new retail development given the existing retail offer. It is therefore very unlikely that substantial new retail development will need to be planned for. That said, should proposals come forward for an appropriate scale and nature of retail development, such as a redevelopment of the core town centre shopping facilities in for example The

Mercat Centre in Kirkcaldy or The Kingdom Centre in Glenrothes, which reflects the role and function of Mid Fife's hierarchy of town centres, they should be supported by the Council.

Additionally, as noted in Section 4 of this report, there is a considerable amount of vacant floorspace in all Fife's main town centres; some 188 retail units equating to 36,850 sq. m gross of floorspace¹⁵. Applying an average town centre comparison sales density of £4,000 per sq. m would result in a turnover requirement of some £147.4m. Vacant floorspace could therefore absorb some or all of this future identified capacity if these units become occupied by operators.

Finally, it must be noted that residual capacity beyond 2019 should be viewed with caution as there is little certainty over long term economic performance and prosperity.

¹⁵ Goad 2014 data

Conclusions

Fife Council commissioned CH2M Hill and Maria Francké Planning to prepare a Fife wide retail capacity study. The study is required to assess the current convenience and comparison retail offer and to quantify the need for new floorspace. The study updates the development plan evidence base replacing the 2012 study and subsequent 2013 update. This study is written to inform policy development and application across Fife. The study is informed by a household telephone survey of 2,190 residents total in a survey area covering Fife (undertaken by NEMS in 2009). The empirical research is supplemented by desk-based research and analysis carried out by CH2M Hill and Maria Francké Planning.

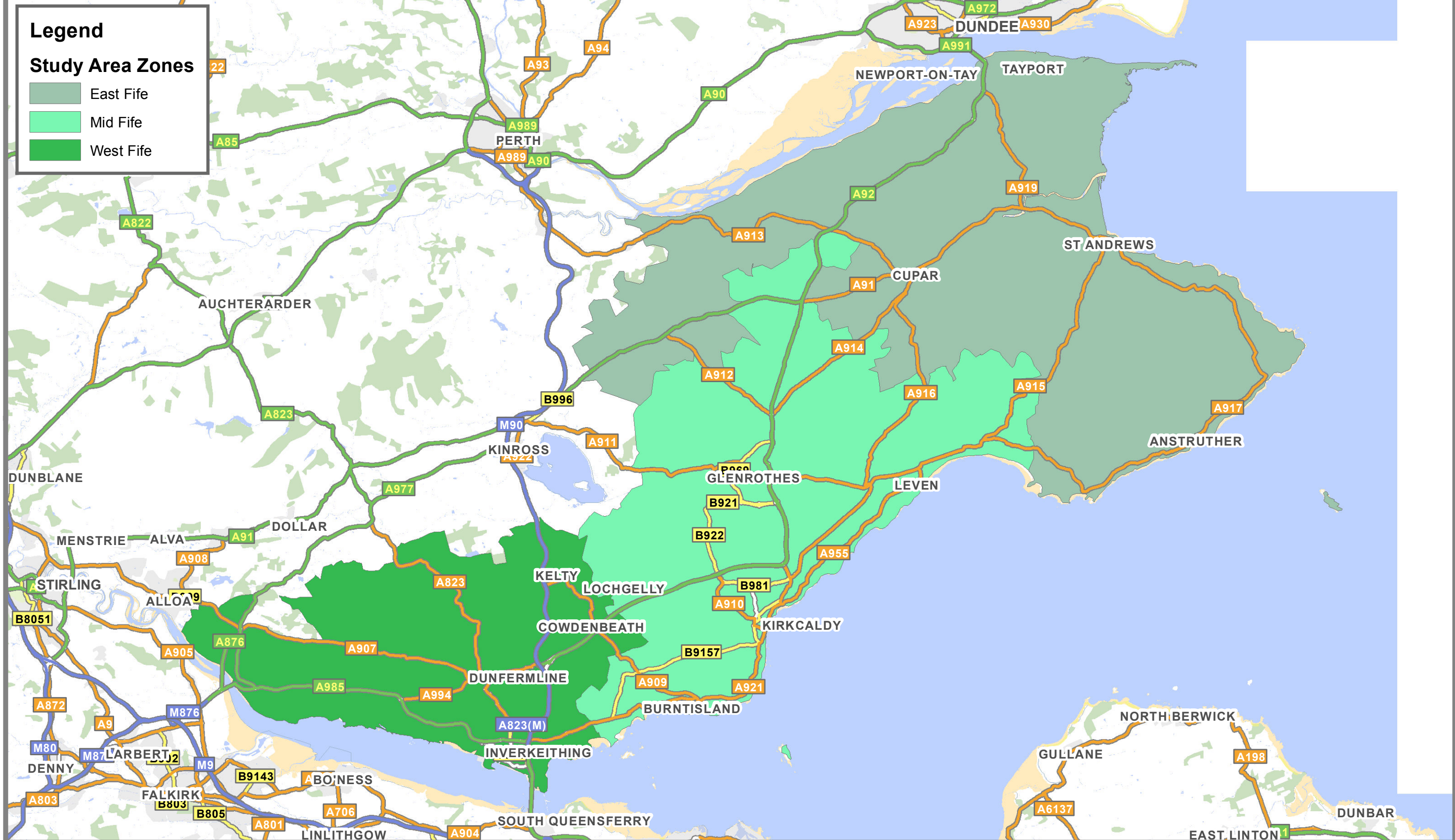
The study considers the quantitative need for additional retail floorspace, informed by the results of the 2009 NEMS household telephone survey and compares the results to previous findings in the 2013 Fife Retail Capacity Study.

As set out in the report, the retail capacity assessment assumes that the market share and role of Fife's three catchment areas and its main town centres will remain unchanged in the future. Whilst this study is a quantitative capacity report and does not address the vitality and viability of town centres, it will be important in considering proposals for new retail development to make reference to benefits derived from qualitative improvements in retail provision. If a proposal for retail development comes forward and that proposal exceeds the capacity projections set out in our tables in Appendix B and 3, this does not necessarily mean the proposal should be refused planning permission. Retail capacity is an important consideration in the context of retail trade diversion and retail impact, but it is also important to place this in context with whether a proposed development is consistent with the role, character and catchment area of the town or area it is intended to serve. It is important that such a qualitative consideration sits alongside a consideration of whether a proposal is justified in terms of SPP's sequential approach and recommended impact tests.

In terms of convenience expenditure capacity, our assessment demonstrates that there is no requirement for additional convenience goods floorspace across the study period in either West Fife or East Fife. The catchment areas are served by large foodstores as well as a range of smaller convenience facilities which provide for more localised top up provision. There are also a number of outstanding commitments for new convenience goods floorspace which have not yet been built out. Only in Mid Fife by 2024, is there a notional £6.09m to support additional convenience goods floorspace.

Notwithstanding the economic downturn, there is comparison goods expenditure capacity within West Fife to support the development of new retail floorspace. This capacity increases throughout the study period to 2024. This capacity would allow for the development of more modern retail units within the catchments main town centres, which would meet the requirements of retailers which would be expected to be present in towns of their size but which are not currently represented. In Mid Fife, there is no residual expenditure capacity to support additional comparison floorspace throughout the study period. In East Fife, there is residual expenditure surplus to support small new town centre floorspace. These notional levels of floorspace would allow for some small scale redevelopment and/or shop refurbishments in East Fife's main town centres.

Appendix A
Study Area Catchment Plan



Appendix B
Convenience Goods Capacity Assessment

Table 1: Catchment Area Population Projections

Catchment Area	2014	2019	2024	Growth 2014-24
West Fife	125,960	128,908	131,649	5,688
Mid Fife	177,437	181,449	185,072	7,635
East Fife	67,545	69,000	70,343	2,798
Total Fife	370,942	379,357	387,064	16,121

- Notes:**
1. Population data from 'Population and Expenditure Data Report from Experian Retail Planner' dated 28/05/14 for East Fife, Mid Fife and West Fife, based on post 2011 Census data
 2. The population of 'Clackmannan' from postcode sector FK10 4 has been excluded from West Fife

Table 2.1: Convenience Goods Expenditure Per Head (£) Including Non Store Retail Trade (NSRT)

Catchment Area	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
West Fife	2,165	2,152	2,146	2,148	2,165	2,182	2,200	2,217	2,235	2,253	2,271	2,289	2,307
Mid Fife	2,072	2,060	2,053	2,055	2,072	2,088	2,105	2,122	2,139	2,156	2,173	2,191	2,208
East Fife	2,168	2,155	2,149	2,151	2,168	2,185	2,203	2,220	2,238	2,256	2,274	2,292	2,311

- Notes:**
1. 2012 Prices
 2. Base expenditure Per Head figures for East Fife, Mid Fife and West Fife from Experian Retail Planner Report 28/05/2014
 3. Expenditure per head projected using Experian Forecast convenience goods expenditure per head growth rates from Experian Retail Planner Briefing Note 11 (October 2013) Figure 1a (2013: -0.6, 2014: -0.3, 2015: 0.1, 2016-29: 0.8 (annual average over 10 years 2021-30))

Table 2.2: Convenience Goods Expenditure Per Head (£) with NSRT Deduction

Catchment Area	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
West Fife	2,120	2,098	2,088	2,083	2,096	2,106	2,116	2,129	2,141	2,149	2,164	2,179	2,194
Mid Fife	2,028	2,008	1,998	1,994	2,006	2,015	2,025	2,037	2,049	2,057	2,071	2,086	2,100
East Fife	2,122	2,101	2,091	2,086	2,099	2,109	2,119	2,132	2,144	2,152	2,167	2,182	2,197
Proportion of Expenditure Accounted for by NSRT Means (%)	2.1	2.5	2.7	3	3.2	3.5	3.8	4	4.2	4.6	4.7	4.8	4.9

- Notes:**
1. 2012 prices
 2. Base convenience goods expenditure per head for 2014-2024 taken from Table 2.1
 3. NSRT = Non-store Retail Trade - the proportion of retail expenditure spent through means other than physical shops including the internet, mail order, markets, vending machines, television shopping, door to door sales, interactive television and vending machines
 4. NSRT deduction taken from Appendix 3 of Experian Retail Planner Briefing Note 11, October 2013
 5. NSRT deduction excludes the proportion of trade sourced from physical stores such as online delivery sourced directly from stores and 'click and collect' with 70% of sales excluded as per page 21 of Experian Retail Planner Briefing Note 11, October 2013

Convenience Goods Capacity Assessment – Appendix B

Table 3: Total Available Convenience Expenditure (£m)

Catchment Area	2014	2019	2024	Growth in Convenience Goods Expenditure 2014 - 2024
West Fife	262.96	274.39	288.88	25.92
Mid Fife	354.51	369.64	388.66	34.15
East Fife	141.20	147.07	154.57	13.36
Total Fife	758.67	791.10	832.11	73.44

Notes:

- 2012 prices
- Total available convenience goods expenditure for catchment areas calculated by multiplying Table 1 (Population) by Table 2.2 (Expenditure per head with NSRT deduction)

Table 4.1: West Fife Convenience Retail Floorspace and Turnover

	Floorspace sq. m		Benchmark turnover ratio £/sq. m	2014	2015	2016	2017	2018	2019	2024
	Gross	Net		Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m
Dunfermline Town Centre										
Marks & Spencer (ground floor 2,120 sqm gross and 30% gross conv)	636	413	10,522	4.35	4.32	4.32	4.32	4.32	4.32	4.34
Rest of Town Centre, including small Co-op	3,690	2,399	5,814	13.94	13.85	13.85	13.85	13.85	13.85	13.90
Sub Total	4,326	2,812		18.29	18.17	18.17	18.17	18.17	18.17	18.24
ASDA Halbeath (total 9,540 + 1,162 mez sq m gross, est 55% conv)	5,886	3,532	12,394	43.77	43.46	43.46	43.46	43.46	43.46	43.64
ASDA St Leonards (total 4,749 sq. m, 75% conv)	3,562	2,137	12,394	26.49	26.30	26.30	26.30	26.30	26.30	26.41
Tesco Duloch (total 6,147 sq m, 82% conv, + ext 2,747 at 22% conv)	5,645	3,387	10,496	35.55	35.30	35.30	35.30	35.30	35.30	35.44
Tesco Carnegie Drive (6,515sq.m gross, 70% conv)	4,561	3,192	10,496	33.51	33.27	33.27	33.27	33.27	33.27	33.41
Aldi Duloch (1,606 sqm gross, 80% conv)	1,285	899	6,771	6.09	6.05	6.05	6.05	6.05	6.05	6.07
Dobbies Garden Centre - Farm food hall (estimate 90% net)	350	315	8,000	2.52	2.50	2.50	2.50	2.50	2.50	2.51
Tesco Express, Aberdour Road	326	261	16,393	4.28	4.25	4.25	4.25	4.25	4.25	4.26
Aldi Halbeath Road (1,197 sq. m gross + 223 sq. m gross ext)	1,420	937	6,771	6.34	6.30	6.30	6.30	6.30	6.30	6.33
Iceland, Halbeath Road (est.80% conv)	641	513	7,304	3.75	3.72	3.72	3.72	3.72	3.72	3.73
Farmfoods, Carnegie Retail Park	750	525	6,200	3.26	3.23	3.23	3.23	3.23	3.23	3.25
Other Dunfermline shops	4,298	2,794	2,856	7.98	7.92	7.92	7.92	7.92	7.92	7.95
Co-op (former David Sands), Linburn Road, Dunfermline	319	191	6,600	1.26	1.25	1.25	1.25	1.25	1.25	1.26
Rosyth	1,888	1,227	2,907	3.57	3.54	3.54	3.54	3.54	3.54	3.56
Tesco, Rosyth	1,609	965	10,496	10.13	10.06	10.06	10.06	10.06	10.06	10.10
Sainsburys Local & Retail Units, Camdean, Rosyth	1,300	780	11,607	9.05	8.99	8.99	8.99	8.99	8.99	9.03
Inverkeithing	1,060	689	2,907	2.00	1.99	1.99	1.99	1.99	1.99	2.00
Crossgates	566	368	2,907	1.07	1.06	1.06	1.06	1.06	1.06	1.07
Kincardine	1,060	689	2,907	2.00	1.99	1.99	1.99	1.99	1.99	2.00
Tesco Metro, Dalgety Bay	1,840	1,288	10,496	13.52	13.42	13.42	13.42	13.42	13.42	13.48
Rest of Dalgety Bay	160	104	2,907	0.30	0.30	0.30	0.30	0.30	0.30	0.30
ASDA Dalgety Bay (3,437 sq. m gross 80% conv)	2,750	1,650	12,394	20.45	20.30	20.30	20.30	20.30	20.30	20.39
Oakley, Saline, Torryburn, H Valleyfield, Crossford,Comrie, Cairneyhill, Charleston plus few others	2,454	1,595	2,907	4.64	4.60	4.60	4.60	4.60	4.60	4.62
Sub Total	43,729	28,038		241.52	239.83	239.83	239.83	239.83	239.83	240.79
Cowdenbeath Town Centre										
Morrisons	2,110	1,055	12,635	13.3	13.21	13.21	13.21	13.21	13.21	13.26
Rest of Town Centre	2,350	1,528	3,488	5.1	5.06	5.06	5.06	5.06	5.06	5.08
Sub Total	4,460	2,583		18.4	18.3	18.3	18.3	18.3	18.3	18.3
Kelty	550	358	2,907	1.0	0.99	0.99	0.99	0.99	0.99	1.00
Total West Fife	53,065	33,790		279.21	277.26	277.26	277.26	277.26	277.26	278.37

Notes:

- 2012 prices
- Gross floorspace for town centre shops based on Goad 2014 data
- Dunfermline Town Centre floorspace based on gross: net ratio 35:65
- Other gross floorspace provided by Fife Council based on their 2007 floorspace survey or planning applications
- Aldi Halbeath Road floorspace data based on planning application
- Trading level for other shops in Dunfermline, Rosyth, Inverkeithing, Crossgates, Kincardine, Dalgety Bay and Kelty estimated to be at 50% of Dunfermline Town Centre turnover ratio
- Trading level for Cowdenbeath Town Centre estimated at 60% of Dunfermline Town Centre turnover ratio
- Iceland, Halbeath Road floorspace based on retail agents' data
- Supermarket benchmark turnover ratios based on Retail Rankings 2013, adjusted to remove non retail sales and add VAT
- Average turnover ratios for town centre convenience floorspace based on an estimated uplift of 2% from 2013 Fife Retail Study figures
- Turnovers projected utilising Experian forecast sales densities taken from Experian Retail Planner Briefing Note 11 (October 2013) Table 4a (2015, -0.7%; 2016-2020, 0%; 2021-2030, 0.1%)

Table 4.2: Mid Fife Convenience Retail Floorspace and Turnover

Mid Fife Catchment Area	Floorspace sq. m		Benchmark turnover ratio £/sq. m	2014	2015	2016	2017	2018	2019	2024
	Gross	Net		Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m
Kirkcaldy Town Centre										
Tesco, Postings (4,420 sq. m gross, 85% gross conv)	3,757	2,254	10,496	23.66	23.49	23.49	23.49	23.49	23.49	23.59
Lidl (1,380 gross, 85% gross conv)	1,173	880	4,159	3.66	3.63	3.63	3.63	3.63	3.63	3.65
Marks & Spencer (2,830 sq. m gross, 30% gross conv)	849	552	10,522	5.81	5.77	5.77	5.77	5.77	5.77	5.79
Rest of Town Centre	3,420	2,223	5,814	12.92	12.83	12.83	12.83	12.83	12.83	12.89
Sub Total	9,199	5,909		46.05	45.73	45.73	45.73	45.73	45.73	45.91
Morrisons, Inveriel	5,095	2,815	12,635	35.57	35.32	35.32	35.32	35.32	35.32	35.46
ASDA, Kirkcaldy	7,133	3,846	12,394	47.67	47.33	47.33	47.33	47.33	47.33	47.52
Sainsburys, Kirkcaldy (5,819 sq.m gross, 85% conv)	4,946	2,968	10,904	32.36	32.14	32.14	32.14	32.14	32.14	32.27
Aldi, McKenzie St, Kirkcaldy (1,493 sq m gross, 80% conv)	1,194	896	6,771	6.07	6.02	6.02	6.02	6.02	6.02	6.05
Aldi, Ferrard Road, Kirkcaldy (1,606 sq.m gross, est 80% conv)	1,285	899	6,771	6.09	6.05	6.05	6.05	6.05	6.05	6.07
Other Kirkcaldy shops	3,420	2,223	2,907	6.46	6.42	6.42	6.42	6.42	6.42	6.44
Dysart	309	201	2,907	0.58	0.58	0.58	0.58	0.58	0.58	0.58
Coaltown of Wemyss	37	24	2,907	0.07	0.07	0.07	0.07	0.07	0.07	0.07
Ballingry	1,054	685	2,907	1.99	1.98	1.98	1.98	1.98	1.98	1.99
Lochgelly	1,310	852	2,907	2.48	2.46	2.46	2.46	2.46	2.46	2.47
Lochore	667	434	2,907	1.26	1.25	1.25	1.25	1.25	1.25	1.26
Cardenden	2,531	1,645	2,907	4.78	4.75	4.75	4.75	4.75	4.75	4.77
Burntisland	1,610	1,047	2,907	3.04	3.02	3.02	3.02	3.02	3.02	3.03
Kinghorn & Aberdour	948	616	2,907	1.79	1.78	1.78	1.78	1.78	1.78	1.79
Sub Total	31,539	19,150		150.21	149.16	149.16	149.16	149.16	149.16	149.76
Glenrothes Town Centre										
Morrisons (6,968 sq. m gross, 62% gross conv)	4,320	2,160	12,635	27.29	27.10	27.10	27.10	27.10	27.10	27.21
Lidl (1,000 sm m gross, 90% gross conv)	900	675	4,159	2.81	2.79	2.79	2.79	2.79	2.79	2.80
Aldi (1,300 sq m gross, 85% gross conv)	1,105	829	6,771	5.61	5.57	5.57	5.57	5.57	5.57	5.59
Rest of Town Centre	2,980	1,937	5,814	11.26	11.18	11.18	11.18	11.18	11.18	11.23
Sub Total	9,305	5,601		46.97	46.64	46.64	46.64	46.64	46.64	46.83
ASDA, Glenrothes, (7,897 sq. m gross, 55% gross conv)	4,343	2,606	12,394	32.30	32.07	32.07	32.07	32.07	32.07	32.20
Iceland, Glenwood Centre, Glenrothes	717	624	7,304	4.56	4.52	4.52	4.52	4.52	4.52	4.54
Other Glenrothes shops	4,422	2,874	2,907	8.20	8.14	8.14	8.14	8.14	8.14	8.18
Leslie	835	543	2,907	1.58	1.57	1.57	1.57	1.57	1.57	1.57
Markinch	764	497	2,907	1.44	1.43	1.43	1.43	1.43	1.43	1.44
Kinglassie & Thornton	935	608	2,907	1.77	1.75	1.75	1.75	1.75	1.75	1.76
Falkland & Freuchie	410	267	2,907	0.77	0.77	0.77	0.77	0.77	0.77	0.77
Ladybank & Kettlebridge	355	231	2,907	0.67	0.67	0.67	0.67	0.67	0.67	0.67
Sub Total	12,781	8,248		51.29	50.93	50.93	50.93	50.93	50.93	51.13
Leven Town Centre										
Sainsburys (4,345 sq. m gross, 93% gross conv)	4,049	2,430	10,904	26.49	26.31	26.31	26.31	26.31	26.31	26.41
Lidl (1,060 sq m gross, 90% gross conv)	954	716	4,159	2.98	2.95	2.95	2.95	2.95	2.95	2.97
Rest of Town Centre	2,340	1,521	3,488	5.31	5.27	5.27	5.27	5.27	5.27	5.29
Sub Total	7,343	4,666		34.77	34.53	34.53	34.53	34.53	34.53	34.67
East Wemyss	395	257	2,907	0.75	0.74	0.74	0.74	0.74	0.74	0.74
Aldi, Turpie Road, Leven (1,480 sq. m gross, 80% gross conv)	1,184	792	6,771	5.36	5.33	5.33	5.33	5.33	5.33	5.35
Methil/ Methilhill	3,325	2,161	2,907	6.28	6.24	6.24	6.24	6.24	6.24	6.26
Buckhaven	1,736	1,128	2,907	3.28	3.26	3.26	3.26	3.26	3.26	3.27
Kennoway & Windygates & Upper Largo	1,108	720	2,907	2.09	2.08	2.08	2.08	2.08	2.08	2.09
Lundin Links & Lower Largo	329	214	2,907	0.62	0.62	0.62	0.62	0.62	0.62	0.62
Sub Total	8,077	5,272		18.39	18.26	18.26	18.26	18.26	18.26	18.33
Total Mid Fife	78,245	48,847		347.68	345.25	345.25	345.25	345.25	345.25	346.63

Notes:

- 2012 prices
- Gross floorspace for town centre shops based on Goad 2014 data
- Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey or planning applications
- Gross: net ratio of small towns' floorspace is 35:65
- Aldi, Turpie Road, Leven 1,480 sq.m gross, gross:net ratio 67:33 and 80:20 conv:comp
- Supermarket benchmark turnover ratios based on Retail Rankings 2013, adjusted to remove non retail sales and add VAT
- Average turnover ratios for town centre convenience floorspace based on an estimated uplift of 2% from 2013 Fife Retail Study figures
- Turnovers projected utilising Experian forecast sales densities taken from Experian Retail Planner Briefing Note 11 (October 2013) Table 4a (2015, -0.7%; 2016-2020, 0%; 2021-2030, 0.1%)

Table 4.3: East Fife Convenience Retail Floorspace and Turnover

East Fife Catchment Area	Floorspace sq. m		Benchmark turnover ratio £/sq. m	2014	2015	2016	2017	2018	2019	2024
	Gross	Net		Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m
St Andrews Town Centre										
Tesco Metro	1,560	1,092	10,496	11.46	11.38	11.38	11.38	11.38	11.38	11.43
Sainsbury's Local	580	464	15,941	7.40	7.34	7.34	7.34	7.34	7.34	7.37
Rest of Town Centre	3,590	2,334	4,998	11.66	11.58	11.58	11.58	11.58	11.58	11.63
Sub Total	5,730	3,890		30.52	30.31	30.31	30.31	30.31	30.31	30.43
Morrison's, St Andrews										
Morrison's, St Andrews	3,740	1,870	12,635	23.63	23.46	23.46	23.46	23.46	23.46	23.56
Aldi, St Andrews (1,331 sq. m gross, 80% gross conv)	1,065	799	6,771	5.41	5.37	5.37	5.37	5.37	5.37	5.39
Other St Andrews shops	606	394	2,907	1.15	1.14	1.14	1.14	1.14	1.14	1.14
Balmullo, Guardbridge, Kingsbarns, Leuchars, S'kinness	1,410	917	2,907	2.66	2.65	2.65	2.65	2.65	2.65	2.66
Sub Total	6,821	3,979		32.84	32.61	32.61	32.61	32.61	32.61	32.74
Cupar Town Centre										
Co-op	1,200	780	8,863	6.91	6.86	6.86	6.86	6.86	6.86	6.89
Lidl (2,000 sq. m gross, 80% gross conv)	1,600	1,200	4,159	4.99	4.96	4.96	4.96	4.96	4.96	4.98
Rest of Town Centre	2,160	1,404	3,998	5.61	5.57	5.57	5.57	5.57	5.57	5.60
Sub Total	4,960	3,384		17.52	17.40	17.40	17.40	17.40	17.40	17.46
Tesco, Cupar										
Tesco, Cupar	2,004	1,202	10,496	12.62	12.53	12.53	12.53	12.53	12.53	12.58
Ceres & Dairsie	566	368	2,907	1.07	1.06	1.06	1.06	1.06	1.06	1.07
Anstruther	620	403	2,907	1.17	1.16	1.16	1.16	1.16	1.16	1.17
Cellardyke & Crail & St Monans & Pittenweem	1,262	820	2,907	2.38	2.37	2.37	2.37	2.37	2.37	2.38
Elie & Colinsburgh	405	263	2,907	0.77	0.76	0.76	0.76	0.76	0.76	0.76
Tayport/Wormit & Newport	1,523	990	2,907	2.88	2.86	2.86	2.86	2.86	2.86	2.87
Newburgh & Strathmiglo & Auchtermuchty	946	615	2,907	1.79	1.78	1.78	1.78	1.78	1.78	1.78
Sub Total	7,326	4,662		22.68	22.52	22.52	22.52	22.52	22.52	22.61
Total East Fife	24,837	15,914		103.56	102.83	102.83	102.83	102.83	102.83	103.25

Notes:

1. 2012 prices
2. Gross floorspace for town centre shops based on Goad 2014 data
3. Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey or planning applications
4. Gross:net ratio of small towns floorspace is 35:65
5. Supermarket benchmark turnover ratios based on Retail Rankings 2013, adjusted to remove non retail sales and add VAT
6. Average turnover ratios for town centre convenience floorspace based on an estimated uplift of 2% from 2013 Fife Retail Study figures
7. Turnovers projected utilising Experian forecast sales densities taken from Experian Retail Planner Briefing Note 11 (October 2013) Table 4a (2015, -0.7%; 2016-2020, 0%; 2021-2030, 0.1%)

Table 5: Convenience Expenditure Estimated % Net Flows 2014 (Based on the NEMS 2009 Household Survey)

Convenience Goods Flow	Outflow	Inflow		Net Flow
Catchment Area	NEMS 2009	NEMS 2009	2014 Net Leakage Adjustment	
West Fife	6%	10%	1%	5%
Mid Fife	9%	6%	1%	-2%
East Fife	34%	5%	9%	-20%
Outflows from Fife as a whole	5%			

Notes:

1. West Fife 2014 adjustment of 1% to Net Leakage of 6%, due to construction of Tesco, Carnegie Drive, Dunfermline
2. Mid Fife 2014 adjustment of 1% to Net Leakage of 9% due to Morrisons store in Kirkcaldy
3. East Fife 2014 adjustment of 9% to Net Leakage of 34% due to development of Aldi, Lidl, Sainsburys Local

Convenience Goods Capacity Assessment – Appendix B

Table 6: Estimated Convenience Goods Turnover of Commitments within Catchment Area

	Floorspace sq m		Average turnover ratio £/sq m	2014 Turnover £m	2019 Turnover £m	2024 Turnover £m
	Gross	Net				
West Fife						
Supermarket, North End Park, Cowdenbeath - Vico Properties, total 4,300 sq m gross. Net 2,573 sq m. (conv 1,858 sq m comp 715 sq m) Consent Issued and S69 Signed (13/00190/FULL)	3,105	1,858	10,496	19.50	19.36	19.38
Aldi, Cowdenbeath, Stenhouse Street - Proposals for 1,587 sq m gross (around 75% conv) (14/00803/FULL)	1,190	844	4,763	4.02	3.99	4.00
South Fod Neighbourhood Centre - Total supermarket 2,323 sq m gross (11/06623/PPP) (Also see other consent on same site below)	2,323	1,394	11,607	16.20	16.09	16.10
Sub Total		4,096		39.72	39.44	39.48
Mid Fife						
Kingslaw Village and Burnside Neighbourhood, Kirkcaldy (2x neighbourhood centres with retail) - Phase 1, Kingslaw Village: neighbourhood centre (supermarket of 370 sq m gross). Phase 3, Burnside Neighbourhood. Retail including a supermarket of 1,500 sq m gross, Application Approved Subject to Legal Agreement (10/01774/EIA)	1,870	1,122	9,400	10.55	10.47	10.48
New Bridge Tavern, Glenwood Centre, Glenrothes - Permission Granted (13/03923/FULL)	379	246	2,850	0.70	0.70	0.70
Aldi Extension, Flemington Road, Glenrothes - Extension represents 206sq.m gross increase (est 85:15 conv/comp). Approved Feb 2014 (planning permission 13/03750/FULL)	175	170	4,763	0.81	0.80	0.80
Tesco, Land To South Of Pfaudler-Balfour Riverside, Leven - Total 3,372 sq m gross, 2,136 sq m net . 1, 551 sq m net cov & 585 sq m net comp. Permission Issued Jan 2014 (PP 11/02496/FULL)		1,551	10,496	16.28	16.17	16.18
Sub Total		3,089		28.34	28.14	28.17
East Fife						
Tesco Replacement, South Road, Cupar (Net increase of 730 sq m convenience) (08/01079/EFULL)		730	10,496	7.66	7.61	7.62
Aldi, South Road, Cupar. 1,587sq.m Gross (1,140 sq m net) (conv/comp 74:26). (13/03752/FULL)		844	4,763	4.02	3.99	4.00
M&S Simply Food, Largo Road, St Andrews. Recent consent (PP 13/02184/FULL)	1,395	907	10,522	9.54	9.48	9.49
Sub Total		2,481		21.23	21.08	21.10

Notes:

1. Planning consents and applications agreed with Fife Council, with average company turnover ratios applied (based on the Retail Rankings 2013) unless otherwise specified
2. Aldi, Cupar and Glenrothes extension, turnover based on more recent Aldi application at Cowdenbeath, but adjusted from 2011 to 2012 price base
3. Aldi, Cowdenbeath, applicant's turnover figure but adjusted from 2011 to 2012 price base
4. Kingslaw Village and Burnside Neighbourhood, Kirkcaldy - Turnover ratio is based on assumption that the larger store is a national food retailer
5. New Bridge Tavern, Glenwood Centre, Glenrothes - Consent includes two Class 1 units having a gross floor area of approximately 474 sq. m gross (379 sq.m and 95 sq.m respectively). We have assumed the 379 sq.m unit to be a convenience store
6. Tesco Replacement, South Road, Cupar - Based on new gross floorspace of 4,294 sq.m (of which 75% is convenience) less 2,004 sq.m existing store

Table 7: Other Retail Applications above 2,500 sq.m gross, not treated as Deductions from Capacity

	Floorspace sq m		Average turnover ratio £/sq m	2014 Turnover £m
	Gross	Net		
West Fife				
Shepherd Offshore, Supermarket, Dunfermline East - (Freescale site - 11/04948/PPP)	3,000	2,000	11,607	23.2
Pilmuir Works Redevelopment, Dunfermline - Total 5,496 sq m gross of which 1,220 sq m gross is intended for convenience retailing . Consent Issued (PP 11/01419/FULL)	1,220	915	3,500	3.2
South Fod Neighbourhood Centre (alternative) - Total 1,513 sq m gross Class 1. Estimate 30% conv, 30% comp and 40% services. (Same site as supermarket consent above) Could potentially progress if the supermarket is not developed.	454	272	2,850	0.8
Aldi inc Mixed Use Dev, Donnibristle Hillend Industrial Estate, Dalgety Bay - Proposed as 1,574sqm gross, 1,125sq.m net, (74% conv/26% comp split) Pending Consideration 13/02953/PPP		833	4,575	3.81
Mid Fife				
Supermarket, Fabteck Site, Lochgelly - 2,500 sq m gross. Application Approved	2,500			
Aldi Extension and New Retail Unit, Mckenzie Street, Kirkcaldy - Approved. (PP 08/02059/CFULL)	481	361	4,763	1.7

Notes:

1. Planning consents and applications agreed with Fife Council, with average company turnover ratios applied (based on the Retail Rankings 2013) unless otherwise specified

Convenience Goods Capacity Assessment – Appendix B

Table 8.1: Summary of Capacity for Convenience Goods Floorspace in West Fife

West Fife Catchment Area	2014	2019	2024
Total Available Convenience Goods Expenditure (£m)	262.96	274.39	288.88
Net Flow of Expenditure (%)	5%	5%	5%
Net Flow of Expenditure (£m)	13.15	13.72	14.44
Retained Expenditure (£m)	276.11	288.11	303.32
Benchmark Turnover of Existing Facilities (£m)	279.21	277.26	278.37
Turnover of Commitments (£m)	39.72	39.44	39.48
Residual Expenditure Capacity (£m)	-42.83	-28.59	-14.53

Notes:

1. Commitments as agreed with Fife Council (as per Table 6)

Table 8.2: Summary of Capacity for Convenience Goods Floorspace in Mid Fife

Mid Fife Catchment Area	2014	2019	2024
Total Available Convenience Goods Expenditure (£m)	354.51	369.64	388.66
Net Flow of Expenditure (%)	-2%	-2%	-2%
Net Flow of Expenditure (£m)	-7.09	-7.39	-7.77
Retained Expenditure (£m)	347.42	362.24	380.89
Benchmark Turnover of Existing Facilities (£m)	347.68	345.25	346.63
Turnover of Commitments (£m)	28.34	28.14	28.17
Residual Expenditure Capacity (£m)	-28.60	-11.15	6.09
Top Four' Foodstore Turnover per sq. m (£m)	11,607	11,526	11,572
Net Floorspace Equivalent 'Top Four' Foodstore (sq. m)			526
Discounter' Foodstore Turnover per sq. m (£m)	6,109	6,066	6,090
Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)			999
Gross Floorspace Equivalent 'Top Four' Foodstore (sq. m)			809
Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)			1,333

Notes:

1. Commitments as agreed with Fife Council (as per Table 6)
2. 'Top Four' foodstore turnover based on average turnover ratios of top 4 supermarkets (ASDA, Morrisons, Sainsburys and Tesco) of £11,607 per sq.m net in 2014
3. 'Discounter' foodstore turnover based on average turnover ratios of Aldi, Lidl, Farmfoods and Iceland of £6,109 per sq.m net
4. 'Top Four' and 'Discounter' Turnovers projected utilising Experian forecast sales densities taken from Experian Retail Planner Briefing Note 11 (October 2013) Table 4a (2015, -0.7%; 2016-2020, 0%; 2021-2030, 0.1%)
5. Gross floorspace equivalent for 'Top Four' foodstore retailers assumes a gross to net ratio of 65%
6. Gross floorspace equivalent for 'Discounter' foodstore retailers assumes a gross to net ratio of 75%
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq.m of any relevant convenience goods proposal

Table 8.3: Summary of Capacity for Convenience Goods Floorspace in East Fife

East Fife Catchment Area	2014	2019	2024
Total Available Convenience Goods Expenditure (£m)	141.20	147.07	154.57
Net Flow of Expenditure (%)	-20%	-20%	-20%
Net Flow of Expenditure (£m)	-28.24	-29.41	-30.91
Retained Expenditure (£m)	112.96	117.66	123.65
Benchmark Turnover of Existing Facilities (£m)	103.56	102.83	103.25
Turnover of Commitments (£m)	21.23	21.08	21.10
Residual Expenditure Capacity (£m)	-11.82	-6.25	-0.69

Notes:

1. Commitments as agreed with Fife Council (as per Table 6)

Convenience Goods Capacity Assessment – Appendix B

Table 9.1: Summary of Capacity for Convenience Goods Floorspace in West Fife - Increase in Clawback to 2024

West Fife Catchment Area	2014	2019	2024
Total Available Convenience Goods Expenditure (£m)	262.96	274.39	288.88
Net Flow of Expenditure (%)	5%	5%	5%
Net Flow of Expenditure (£m)	13.15	13.72	14.44
Retained Expenditure (£m)	276.11	288.11	303.32
Leakage 6% (from Table 5)	16.57	17.29	18.20
Clawback of 25% leakage (£m)	4.14	4.32	4.55
Clawback of 50% leakage (£m)	8.28	8.64	9.10
Benchmark Turnover of Existing Facilities (£m)	279.21	277.26	278.37
Turnover of Commitments (£m)	39.72	39.44	39.48
Residual Expenditure Capacity (£m)	-42.83	-28.59	-14.53
Residual Expenditure Capacity (£m) with 25% clawback	-38.69	-24.27	-9.98
Residual Expenditure Capacity (£m) with 50% clawback	-34.54	-19.95	-5.43

Notes:

1. Commitments as agreed with Fife Council (from Table 6)

Table 9.2: Summary of Capacity for Convenience Goods Floorspace in Mid Fife – Increase in Clawback to 2024

Mid Fife Catchment Area	2014	2019	2024
Total Available Convenience Goods Expenditure (£m)	354.51	369.64	388.66
Net Flow of Expenditure (%)	-2%	-2%	-2%
Net Flow of Expenditure (£m)	-7.09	-7.39	-7.77
Retained Expenditure (£m)	347.42	362.24	380.89
Leakage 9% (from Table 5)	31.27	32.60	34.28
Clawback of 25% leakage (£m)	7.82	8.15	8.57
Clawback of 50% leakage (£m)	15.63	16.30	17.14
Benchmark Turnover of Existing Facilities (£m)	347.68	345.25	346.63
Turnover of Commitments (£m)	28.34	28.14	28.17
Residual Expenditure Capacity (£m)	-28.60	-11.15	6.09
Residual Expenditure Capacity (£m) with 25% clawback	-20.79	-3.00	14.66
Top Four' Foodstore Turnover per sq. m (£m)			11,572
Net Floorspace Equivalent 'Top Four' Foodstore (sq. m)			1,267
Discounter' Foodstore Turnover per sq. m (£m)			6,090
Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)			2,407
Gross Floorspace Equivalent 'Top Four' Foodstore (sq. m)			1,949
Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)			3,209
Residual Expenditure Capacity (£m) with 50% clawback	-12.97	5.15	23.23
Top Four' Foodstore Turnover per sq. m (£m)		11,526	11,572
Net Floorspace Equivalent 'Top Four' Foodstore (sq. m)		447	2,007
Discounter' Foodstore Turnover per sq. m (£m)		6,066	6,090
Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)		850	3,814
Gross Floorspace Equivalent 'Top Four' Foodstore (sq. m)		688	3,088
Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)		1,133	5,085

Notes:

1. Commitments as agreed with Fife Council (from Table 6)
2. 'Top Four' foodstore turnover based on average turnover ratios of top 4 supermarkets (ASDA, Morrisons, Sainsburys and Tesco) of £11,607 per sq.m net in 2014
3. 'Discounter' foodstore turnover based on average turnover ratios of Aldi, Lidl, Farmfoods and Iceland of £6,108.50 per sq.m net in 2014
4. 'Top Four' and 'Discounter' Turnovers projected utilising Experian forecast sales densities taken from Experian Retail Planner Briefing Note 11 (October 2013) Table 4a (2015, -0.7%; 2016-2020, 0%; 2021-2030, 0.1%)
4. Gross floorspace equivalent for 'Top Four' foodstore retailers assumes a gross to net ratio of 65%
5. Gross floorspace equivalent for 'Discounter' foodstore retailers assumes a gross to net ratio of 75%
6. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq.m of any relevant convenience goods proposal

Table 9.3: Summary of Capacity for Convenience Goods Floorspace in East Fife – Increase in Clawback to 2024

East Fife Catchment Area	2014	2019	2024
Total Available Convenience Goods Expenditure (£m)	141.20	147.07	154.57
Net Flow of Expenditure (%)	-20%	-20%	-20%
Net Flow of Expenditure (£m)	-28.24	-29.41	-30.91
Retained Expenditure (£m)	112.96	117.66	123.65
Leakage 34% (from Table 5)	38.41	40.00	42.04
Clawback of 25% leakage (£m)	9.60	10.00	10.51
Clawback of 50% leakage (£m)	19.20	20.00	21.02
Benchmark Turnover of Existing Facilities (£m)	103.56	102.83	103.25
Turnover of Commitments (£m)	21.23	21.08	21.10
Residual Expenditure Capacity (£m)	-11.82	-6.25	-0.69
Residual Expenditure Capacity (£m) with 25% clawback	-2.22	3.75	9.82
Top Four' Foodstore Turnover per sq. m (£m)		11,526	11,572
Net Floorspace Equivalent 'Top Four' Foodstore (sq. m)		325	849
Discounter' Foodstore Turnover per sq. m (£m)		6,066	6,090
Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)		618	1,613
Gross Floorspace Equivalent 'Top Four' Foodstore (sq. m)		500	1,306
Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)		824	2,150
Residual Expenditure Capacity (£m) with 50% clawback	7.38	13.75	20.33
Top Four' Foodstore Turnover per sq. m (£m)	11,607	11,526	11,572
Net Floorspace Equivalent 'Top Four' Foodstore (sq. m)	636	1,193	1,757
Discounter' Foodstore Turnover per sq. m (£m)	6,109	6,066	6,090
Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)	1,209	2,267	3,339
Gross Floorspace Equivalent 'Top Four' Foodstore (sq. m)	978	1,835	2,703
Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)	1,611	3,023	4,451

Notes:

1. Commitments as agreed with Fife Council (from Table 6)
2. 'Top Four' foodstore turnover based on average turnover ratios of top 4 supermarkets (ASDA, Morrisons, Sainsburys and Tesco) of £11,607 per sq.m net in 2014
3. 'Discounter' foodstore turnover based on average turnover ratios of Aldi, Lidl, Farmfoods and Iceland of £6,109 per sq.m net in 2014
4. 'Top Four' and 'Discounter' Turnovers projected utilising Experian forecast sales densities taken from Experian Retail Planner Briefing Note 11 (October 2013) Table 4a (2015, -0.7%; 2016-2020, 0%; 2021-2030, 0.1%)
5. Gross floorspace equivalent for 'Top Four' foodstore retailers assumes a gross to net ratio of 65%
6. Gross floorspace equivalent for 'Discounter' foodstore retailers assumes a gross to net ratio of 75%
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq.m of any relevant convenience goods proposal

Appendix C
Comparison Goods Capacity Assessment

Table 1: Catchment Area Population Projections

Catchment Area	2014	2019	2024	Growth 2014-24
West Fife	125,960	128,908	131,649	5,688
Mid Fife	177,437	181,449	185,072	7,635
East Fife	67,545	69,000	70,343	2,798
Total Fife	370,942	379,357	387,064	16,121

Notes:

1. Population data from 'Population and Expenditure Data Report from Experian Retail Planner' dated 28/05/14 for East Fife, Mid Fife and West Fife, based on post 2011 Census data
2. The population of 'Clackmannan' from postcode sector FK10 4 has been excluded from West Fife

Table 2.1: Comparison Goods Expenditure per Head (£) Including Non Store Retail Trade (NSRT)

Catchment Area	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
West Fife	3,023	3,120	3,191	3,281	3,376	3,474	3,575	3,678	3,785	3,895	4,008	4,124	4,244
Mid Fife	2,701	2,787	2,852	2,931	3,016	3,104	3,194	3,287	3,382	3,480	3,581	3,685	3,792
East Fife	3,089	3,188	3,261	3,352	3,450	3,550	3,653	3,759	3,868	3,980	4,095	4,214	4,336

Notes:

1. 2012 Prices
2. Base expenditure Per Head figures for East Fife, Mid Fife and West Fife from Experian Retail Planner Report 28/05/2014
3. Expenditure per head projected using Experian Forecast comparison goods expenditure per head growth rates from Experian Retail Planner Briefing Note 11 (October 2013) Figure 1a (2013: 3.2, 2014: 2.3, 2015: 2.8, 2016-24: 2.9)

Table 2.2: Comparison Goods Expenditure per Head (£) with NSRT Deduction

Catchment Area	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
West Fife	2,706	2,783	2,821	2,877	2,937	2,995	3,056	3,123	3,198	3,283	3,370	3,468	3,569
Mid Fife	2,417	2,486	2,521	2,571	2,624	2,676	2,731	2,790	2,858	2,934	3,011	3,099	3,189
East Fife	2,765	2,844	2,883	2,940	3,001	3,060	3,123	3,191	3,268	3,355	3,444	3,544	3,647
Proportion of Expenditure Accounted for by NSRT Means (%)	10.5	10.8	11.6	12.3	13	13.8	14.5	15.1	15.5	15.7	15.9	15.9	15.9

Notes:

1. 2012 prices
2. Base comparison goods expenditure per head for 2014-2024 taken from Table 2.1
3. NSRT = Non-store Retail Trade - the proportion of retail expenditure spent through means other than physical shops including the internet, mail order, markets, vending machines, television shopping, door to door sales, interactive television and vending machines
4. NSRT deduction taken from Appendix 3 of Experian Retail Planner Briefing Note 11, October 2013
5. NSRT deduction excludes the proportion of trade sourced from physical stores such as online delivery sourced directly from stores and 'click and collect' with 25% of sales excluded as per page 21 of Experian Retail Planner Briefing Note 11, October 2013

Table 2.3: Bulky Goods Expenditure per Head (£) Including Non Store Retail Trade (NSRT)

Catchment Area	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
West Fife	705	730	743	764	788	812	838	864	890	918	946	976	1,006
Mid Fife	645	668	680	699	721	743	766	790	815	840	866	893	920
East Fife	723	748	762	784	808	833	859	886	913	941	971	1,001	1,032

Notes:

1. 2012 Prices
2. Base expenditure Per Head figures for East Fife, Mid Fife and West Fife from Experian Retail Planner Report 28/05/2014
3. Expenditure per head projected using Experian Forecast bulky goods expenditure per head growth rates from Experian Retail Planner Briefing Note 11 (October 2013) Figure 1a (2013: 3.5, 2014: 1.8, 2015: 2.9, 2016-24: 3.1)

Table 2.4: Bulky Goods Expenditure per Head (£) with NSRT Deduction

Catchment Area	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
West Fife	631	651	657	670	686	700	716	733	752	774	796	821	846
Mid Fife	577	595	601	613	627	641	655	671	688	708	728	751	774
East Fife	647	667	673	687	703	718	734	752	772	794	816	842	868
Proportion of Expenditure Accounted for by NSRT Means (%)	10.5	10.8	11.6	12.3	13	13.8	14.5	15.1	15.5	15.7	15.9	15.9	15.9

Notes:

1. 2012 prices
2. Base comparison goods expenditure per head for 2014-2024 taken from Table 2.1
3. NSRT = Non-store Retail Trade - the proportion of retail expenditure spent through means other than physical shops including the internet, mail order, markets, vending machines, television shopping, door to door sales, interactive television and vending machines
4. NSRT deduction taken from Appendix 3 of Experian Retail Planner Briefing Note 11, October 2013
5. NSRT deduction excludes the proportion of trade sourced from physical stores such as online delivery sourced directly from stores and 'click and collect' with 25% of sales excluded as per page 21 of Experian Retail Planner Briefing Note 11, October 2013

Table 3.1: Total Available Comparison Expenditure (£m)

Catchment Area	2014	2019	2024	Growth in Comparison Goods Expenditure 2014 - 2024
West Fife	355.37	402.57	469.83	114.46
Mid Fife	447.28	506.29	590.13	142.85
East Fife	194.72	220.18	256.52	61.80
Total Fife	997.37	1,129.04	1,316.48	319.11

Notes:

1. 2012 prices
2. Total available comparison goods expenditure for each catchment area obtained by multiplying Table 1 (Population) by Table 2.2 (Expenditure per head minus NSRT adjustment)

Table 3.2: Total Available Bulky Goods Expenditure (£m)

Catchment Area	2014	2019	2024	Growth in Bulky Goods Expenditure 2014 - 2024
West Fife	82.71	94.52	111.39	28.68
Mid Fife	106.60	121.72	143.26	36.66
East Fife	45.49	51.88	61.04	15.55
Total Fife	234.79	268.12	315.68	80.89

Notes:

1. 2012 prices
2. Total available bulky goods expenditure for each catchment area obtained by multiplying Table 1 (Population) by Table 2.4 (Expenditure per head minus NSRT adjustment)

Table 4.1: West Fife Comparison Retail Floorspace and Turnover

West Fife Catchment Area	Floorspace sm m		Turnover ratio £/sq m	2014	2015	2016	2017	2018	2019	2024
	Gross	Net		Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m
Town Centres										
Dunfermline	36,440	25,508	4,423	112.82	115.30	117.72	120.20	122.72	125.30	138.47
Rest of Dunfermline	3,966	2,578	2,211	5.70	5.83	5.95	6.07	6.20	6.33	7.00
Cowdenbeath	3,460	2,249	2,654	5.97	6.10	6.23	6.36	6.49	6.63	7.32
Kelty	630	410	2,211	0.91	0.93	0.94	0.96	0.99	1.01	1.11
Kinross	280	182	2,211	0.40	0.41	0.42	0.43	0.44	0.45	0.49
Inverkeithing	1,030	670	2,211	1.48	1.51	1.54	1.58	1.61	1.64	1.82
Dobbies	3,694	2,401	2,211	5.31	5.43	5.54	5.66	5.78	5.90	6.52
Rest of West Fife	1,870	1,216	2,211	2.69	2.75	2.80	2.86	2.92	2.99	3.30
Sub Total	51,370	35,213		135.28	138.25	141.16	144.12	147.15	150.24	166.04
Supermarkets non food										
ASDA Halbeath (10,702 sq m gross, 45% gross comp)	4,816	2,890	8,056	23.28	23.79	24.29	24.80	25.32	25.85	28.57
ASDA St Leonards (4,749 sq m gross, 25% gross comp)	1,187	712	8,056	5.74	5.86	5.99	6.11	6.24	6.37	7.04
Tesco Duloch	3,249	1,949	6,822	13.30	13.59	13.88	14.17	14.47	14.77	16.32
Tesco Carnegie Drive (6,515 sq. m gross, 30% gross comp)	6,515	1,368	6,822	9.33	9.54	9.74	9.94	10.15	10.37	11.46
ASDA Dalgety Bay (3,427 sq m gross, 20% gross comp)	685	411	8,056	3.31	3.39	3.46	3.53	3.60	3.68	4.07
Sub Total	16,453	7,331		54.96	56.17	57.35	58.56	59.79	61.04	67.46
Retail Warehouses										
Carnegie Retail Park										
B & Q	3,480	2,784	2,086	5.81	5.94	6.06	6.19	6.32	6.45	7.13
Ponden Superstore	390	312	2,300	0.72	0.73	0.75	0.76	0.78	0.80	0.88
Bensons	400	320	2,348	0.75	0.77	0.78	0.80	0.82	0.83	0.92
Dreams	1,030	824	1,200	0.99	1.01	1.03	1.05	1.08	1.10	1.21
Matalan	2,000	1,600	2,300	3.68	3.76	3.84	3.92	4.00	4.09	4.52
Allied Carpets (vacant unit)										
Comet (vacant unit)										
Halfords (non retail)										
Sub Total (excluding Halfords and vacant units)	7,300	5,840		11.95	12.21	12.46	12.73	12.99	13.27	14.66
Halbeath Retail Park										
Currys	1,170	936	6,239	5.84	5.97	6.09	6.22	6.35	6.49	7.17
Carpentryright	970	776	1,125	0.87	0.89	0.91	0.93	0.95	0.97	1.07
Harveys Furnishings	960	768	2,348	1.80	1.84	1.88	1.92	1.96	2.00	2.21
B&M	1,800	1,440	4,566	6.58	6.72	6.86	7.00	7.15	7.30	8.07
Homebase	1,720	1,376	1,275	1.75	1.79	1.83	1.87	1.91	1.95	2.15
Argos	1,730	433	18,756	8.11	8.29	8.46	8.64	8.82	9.01	9.96
Pets at Home	2,890	2,312	2,593	6.00	6.13	6.26	6.39	6.52	6.66	7.36
Vacant unit 7c										
Halfords (planned move into unit in summer 2014)										
Sub Total	11,240	8,041		30.95	31.63	32.30	32.98	33.67	34.38	37.99
Other Retail Warehouses										
Bed Shed, Baldringburn	1,110	888	1,300	1.15	1.18	1.20	1.23	1.26	1.28	1.42
Thomsons World of Furniture	2,500	2,000	900	1.80	1.84	1.88	1.92	1.96	2.00	2.21
Connections Furniture, Nethertown	450	360	900	0.32	0.33	0.34	0.35	0.35	0.36	0.40
Sub Total	4,060	3,248		3.28	3.35	3.42	3.49	3.57	3.64	4.02
Total West Fife	90,423	59,672		236.42	241.62	246.69	251.87	257.16	262.56	290.17

Notes:

- Gross floorspace for town centre shops based on Goad 2014 data
- 'Rest of Dunfermline' and 'Rest of West Fife' floorspace provided by Fife Council, based on their 2007 floorspace survey
- Supermarket and Retail Warehouse floorspace data based on information from Goad 2014 and Fife Council
- Vacant units identified, but no floorspace noted or turnover attributed
- Gross:net ratio of large towns floorspace is 30:70
- Gross:net ratio of small towns floorspace is 35:65
- Gross:net ratio of supermarket floorspace is 40:60
- Gross:net ratio of retail park/warehouse floorspace is 20:80
- Tesco Dulloch (6,147 sq. m gross, 18% gross comp + 2,747 sq. m gross extension, 78% comp)
- Gross floorspace figure for Dunfermline Town Centre based on Goad 2014 data and includes upper floors where applicable
- Average turnover ratios for town centre comparison floorspace based on an estimated uplift of 2.1% from 2013 Fife Retail Study
- Retail sales density growth rates using Experian Retail Planner Briefing Note 11 (October 2013) Table 4b (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)

Table 4.2: Mid Fife Comparison Retail Floorspace and Turnover

Mid Fife Catchment Area	Floorspace sm m		Turnover ratio £/sq m	2014	2015	2016	2017	2018	2019	2024
	Gross	Net		Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m
Town Centres										
Kirkcaldy	38,710	27,097	4,773	129.34	132.18	134.96	137.79	140.69	143.64	158.75
Rest of Kirkcaldy	9,913	6,443	2,386	15.37	15.71	16.04	16.38	16.72	17.07	18.87
Glenrothes	17,290	12,103	4,773	57.77	59.04	60.28	61.55	62.84	64.16	70.91
Rest of Glenrothes	1,794	1,166	2,386	2.78	2.84	2.90	2.96	3.03	3.09	3.42
Leven (excluding Riverside Retail Park)	6,880	4,472	2,864	12.81	13.09	13.36	13.64	13.93	14.22	15.72
Burntisland	720	468	2,386	1.12	1.14	1.17	1.19	1.21	1.24	1.37
Lochgelly	3,140	2,041	2,386	4.87	4.98	5.08	5.19	5.30	5.41	5.98
Falkland, Ladybank, Lundinlinks, Kingskettle, L Ward	1,722	1,119	2,386	2.67	2.73	2.79	2.85	2.91	2.97	3.28
Rest of Mid Fife	7,906	5,139	2,386	12.26	12.53	12.79	13.06	13.34	13.62	15.05
Sub Total	88,075	60,049		238.99	244.25	249.38	254.62	259.96	265.42	293.33
Supermarkets Non Food										
ASDA Kirkcaldy (11,889 sq m gross, 40% gross comp)	4,756	2,568	8,056	20.69	21.14	21.59	22.04	22.50	22.98	25.39
Sainsbury Kirkcaldy (5,819 sq m gross, 15% gross comp)	873	524	7,088	3.71	3.79	3.87	3.95	4.04	4.12	4.56
Tesco (Postings) Kirkcaldy (4,420 sq m gross, 15% gross comp)	663	398	6,822	2.71	2.77	2.83	2.89	2.95	3.01	3.33
ASDA Glenrothes (7,897 sq m gross, 45% gross comp)	3,554	2,132	8,056	17.18	17.55	17.92	18.30	18.68	19.08	21.08
Morrisons Glenrothes (6,968 sq m gross, 38% gross comp)	2,648	1,324	8,213	10.87	11.11	11.35	11.58	11.83	12.08	13.35
Morrisons Inveriel (6,395 sq m gross, 20% gross comp)	1,279	703	8,213	5.78	5.90	6.03	6.16	6.28	6.42	7.09
Sub Total	13,772	7,649		60.94	62.28	63.59	64.93	66.29	67.68	74.80
Retail Warehouses										
Saltire Retail Park, Glenrothes										
Bensons	900	720	2,348	1.69	1.73	1.76	1.80	1.84	1.88	2.07
Matalan	3,160	2,528	2,300	5.81	5.94	6.07	6.19	6.32	6.46	7.14
Brantano	1,020	816	993	0.81	0.83	0.85	0.86	0.88	0.90	0.99
Homebase	3,420	2,736	1,275	3.49	3.57	3.64	3.72	3.79	3.87	4.28
Carpetright	880	704	1,125	0.79	0.81	0.83	0.84	0.86	0.88	0.97
Poundstretcher	3,010	2,408	1,865	4.49	4.59	4.69	4.78	4.88	4.99	5.51
Vacant unit										
Sub Total	12,390	9,912		17.09	17.46	17.83	18.20	18.59	18.98	20.97
Fife Central Retail Park, Kirkcaldy										
Next	1,020	816	4,430	3.61	3.69	3.77	3.85	3.93	4.01	4.44
Boots	1,160	928	6,500	6.03	6.16	6.29	6.43	6.56	6.70	7.40
Pets at Home	940	752	2,593	1.95	1.99	2.03	2.08	2.12	2.17	2.39
Homebase	2,910	2,328	1,275	2.97	3.03	3.10	3.16	3.23	3.30	3.64
Harveys Furnishings	750	600	2,348	1.41	1.44	1.47	1.50	1.53	1.56	1.73
Bensons Beds	780	624	2,348	1.47	1.50	1.53	1.56	1.59	1.63	1.80
Poundworld	600	480	1,865	0.90	0.91	0.93	0.95	0.97	0.99	1.10
Currys	1,470	1,176	6,239	7.34	7.50	7.66	7.82	7.98	8.15	9.01
B&Q	4,930	3,944	2,086	8.23	8.41	8.58	8.77	8.95	9.14	10.10
PC World	1,300	1,040	6,239	6.49	6.63	6.77	6.91	7.06	7.21	7.96
Mothercare & Early Learning Centre (combined unit)	1,470	1,176	3,585	4.22	4.31	4.40	4.49	4.59	4.68	5.17
Argos	1,410	353	18,756	6.61	6.76	6.90	7.04	7.19	7.34	8.11
Toys R Us	950	760	2,082	1.58	1.62	1.65	1.69	1.72	1.76	1.94
Halfords (non retail)										
Sub Total	19,690	14,977		52.80	53.96	55.09	56.25	57.43	58.64	64.80
Riverside Retail Park Leven										
B&M Homestore	1,530	1,224	4,566	5.59	5.71	5.83	5.95	6.08	6.21	6.86
Argos	880	220	18,756	4.13	4.22	4.31	4.40	4.49	4.58	5.06
B&Q	2,650	2,120	2,086	4.42	4.52	4.61	4.71	4.81	4.91	5.43
Homebargains	2,060	1,648	4,566	7.52	7.69	7.85	8.02	8.19	8.36	9.24
Sub Total	7,120	5,212		21.66	22.14	22.60	23.08	23.56	24.06	26.59
Other Retail Warehouses										
Stocks Discount, Kirkcaldy (Carpets)	2,291	1,833	1,000	1.83	1.87	1.91	1.95	1.99	2.04	2.25
Riverside Home Furnishings, Methil	1,550	1,240	1,000	1.24	1.27	1.29	1.32	1.35	1.38	1.52
Sub Total	3,841	3,073		3.07	3.14	3.21	3.27	3.34	3.41	3.77
Total Mid Fife	144,888	100,871		394.55	403.23	411.70	420.35	429.17	438.19	484.27

Notes:

1. Gross floorspace for town centre shops based on Goad 2014 data
2. Gross comparison floorspace for Burntisland, Falkland, Ladybank, Lundinlinks, Kingskettle and L. Ward based on the Council's 2007 floorspace survey
3. Gross comparison floorspace for Rest of Kirkcaldy, Glenrothes and Rest of Mid Fife based on the Council's 2007 floorspace survey
4. Supermarket and Retail Warehouse floorspace data based on information from Goad 2014 and Fife Council
5. Boots average turnover adjusted from Retail Rankings 2013 figure of £10,764 per sq. m to £6,500 per sq. m to reflect locality
6. Vacant units identified, but no floorspace noted or turnover attributed
7. Gross:net ratio of large towns' floorspace is 30:70
8. Gross:net ratio of small towns' floorspace is 35:65
9. Gross:net ratio of retail park/warehouse floorspace is 20:80 (excluding Argos)
10. Average turnover ratios for town centre comparison floorspace based on an estimated uplift of 2.1% from 2013 Fife Retail Study figures
11. Retail sales density growth rates using Experian Retail Planner Briefing Note 11 (October 2013) Table 4b (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)

Table 4.3: East Fife Comparison Retail Floorspace and Turnover

East Fife Catchment Area	Floorspace sm m		Average turnover ratio £/sq m	2014	2015	2016	2017	2018	2019	2024
	Gross	Net		Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m	Turnover £m
Town Centres										
St Andrews	16,450	10,693	3,616	38.67	39.52	40.35	41.20	42.06	42.94	47.46
Cupar	8,610	5,597	2,894	16.19	16.55	16.90	17.25	17.61	17.98	19.88
Anstruther	2,220	1,443	2,170	3.13	3.20	3.27	3.34	3.41	3.48	3.84
Other Floorspace	6,724	4,371	2,170	9.48	9.69	9.89	10.10	10.31	10.53	11.64
Total East Fife	34,004	22,103		67.48	68.96	70.41	71.89	73.40	74.94	82.82

Notes:

1. Gross comparison floorspace for town centre shops based on Goad 2014 data
2. Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey or planning applications
3. Gross:net ratio of all towns floorspace is 35:65
4. Average turnover ratios for town centre comparison floorspace based on an estimated uplift of 2.1% from 2013 Fife Retail Study figures
5. Retail sales density growth rates using Experian Retail Planner Briefing Note 11 (October 2013) Table 4b (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)

Table 5.1: Comparison Expenditure Estimated % Net Flows 2014 (Based on the NEMS 2009 Household Survey)

All Comparison Goods Flow	Outflow	Inflow			Net Flow
Catchment Area	NEMS 2009	NEMs 2009	2014 Net Leakage Adjustment	2014 Net Inflow Adjustment	
West Fife	30%	8%	0%	0%	-22%
Mid Fife	23%	10%	0%	0%	-13%
East Fife	80%	2%	15%	5%	-58%
Outflows from Fife as a whole	25%				

Notes:

1. As per the 2013 Fife Retail Study we have adjusted the outflows and inflows for East Fife due to the nature of the comparison offer in St. Andrews and its draw as a tourist destination

Table 5.2: Bulky Goods Expenditure Estimated % Net Flows 2014 (Based on the NEMS 2009 Household Survey)

Bulky Goods Flow	Outflow	Inflow		Net Flow
Catchment Area	NEMs 2009	NEMs 2009	2014 Net Leakage Adjustment	
West Fife	21%	11%	0%	-10%
Mid Fife	19%	10%	0%	-9%
East Fife	85%	1%	0%	-84%
Outflows from Fife as a whole	22%			

Table 6.1: Estimated Comparison Goods Turnover of Commitments within Catchment Area

	Floorspace sq. m		Average turnover ratio £/sq. m	2014 Turnover £m	2019 Turnover £m	2024 Turnover £m
	Gross	Net				
West Fife						
Supermarket, North End Park, Cowdenbeath - Vico Properties, total 4,300 sq.. m gross. Net 2,573 sq. m. (conv 1,858 sq. m comp 715 sq. m). Consent Issued and S69 Signed (Application Ref: 13/00190/FULL)	1,191	715	6,822	4.88	5.42	5.99
Aldi, Stenhouse Street, Cowdenbeath - Proposals for 1,587 sq. m gross (1,140 sq. m net) (conv:comp 74:26) (14/00803/FULL)		296	4,580	1.36	1.51	1.66
South Fod Neighbourhood Centre - Total 1,513 sq m gross Class 1. Estimate 30% conv. 30% comp and 40% services	454	272	2,200	0.60	0.66	0.73
Sub Total	1,645	1,283		6.83	7.59	8.39
Mid Fife						
Saltire Retail Park extension (Class 1)	3,085	2,468	2,800	6.91	7.67	8.48
Glenrothes - Tullis Russell - Retail warehouses - Class 1	7,432	5,946	2,800	16.65	18.49	20.43
Aldi Extension, Flemington Road, Glenrothes - Extension represents 206 sq.m gross increase (Est 85:15 conv/comp). Approved Feb 2014 (Application Ref: 13/03750/FULL)	31	30	4,580	0.14	0.15	0.17
Tesco, Land To South Of Pfaudler-Balfour Riverside, Leven - Total 3,372 sq. m gross, 2,136 sq. m net. 1, 551 sq. m net conv & 585 sq. m net comp. Permission Issued Jan 2014 (Application Ref: PP 11/02496/FULL)		585	6,822	3.99	4.43	4.90
Sub Total	10,517	9,029		27.69	30.75	33.98
East Fife						
Tesco Replacement, South Road, Cupar - Gross 4,294 sq. m (25% comp) (Application Ref: 08/01079/FULL)	1,074	644	6,822	4.40	4.89	5.40
Aldi, South Road, Cupar. 1,587sq.m Gross (1,140 sq. m net) (conv/comp 74:26) (Application Ref: 13/03752/FULL)		296	4,585	1.40	1.55	1.72
Sub Total		940	11,407	5.80	6.44	7.12

- Notes:**
1. Planning consents and applications agreed with Fife Council, with average company turnover ratios applied (based on the Retail Rankings 2013) unless otherwise specified
 2. Aldi, Cowdenbeath, applicant's turnover figure but adjusted from 2011 to 2012 price base
 3. Aldi, Cupar and Glenrothes extension, turnover based on more recent Aldi application at Cowdenbeath, but adjusted from 2011 to 2012 price base
 4. Tesco Replacement, South Road, Cupar - Based on new gross floorspace of 4,294 sq. m (of which 75% is convenience) less 2,004 sq. m existing store

Table 6.2: Estimated % of Bulky Goods Floorspace in Comparison Commitments

	Floorspace sq m		Average turnover ratio £/sq m	2014 Turnover £m	Estimated % of Turnover from Bulky Goods	2014 Turnover £m	2019 Turnover £m	2024 Turnover £m
	Gross	Net						
West Fife								
Supermarket, North End Park, Cowdenbeath - Vico Properties, total 4,300 sq. m gross. Net 2,573 sq. m. (conv 1,858 sq m comp 715 sq m). Consent Issued and 569 Signed (Application Ref: 13/00190/FULL)	1,191	715	6,822	4.88	0	0.00	0.00	0.00
Aldi, Stenhouse Street, Cowdenbeath - Proposals for 1,587 sq m gross (1,140 sq m net) (conv:comp 74:26) (Application Ref: 14/00803/FULL)		296	4,580	1.36	0	0.00	0.00	0.00
South Fod Neighbourhood Centre - Total 1,513 sq m gross Class 1. Estimate 30% conv. 30% comp and 40% services	454	272	2,200	0.60	0	0.00	0.00	0.00
Sub Total	1,645	1,283		6.83		0.00	0.00	0.00
Mid Fife								
Saltire Retail Park extension (Class 1)	3,085	2,468	2,800	6.91	30	2.07	2.30	2.49
Glenrothes - Tullis Russell - Retail warehouses - Class 1	7,432	5,946	2,800	16.65	50	8.32	9.24	10.02
Aldi Extension, Flemington Road, Glenrothes - Extension represents 206q.m gross increase (est 85:15 conv/comp). Approved Feb 2014 (planning permission 13/03750/FULL)	31	30	4,580	0.14	0	0.00	0.00	0.00
Tesco, Land To South Of Pfaudler-Balfour Riverside, Leven - Total 3,372 sq. m gross, 2,136 sq. m net. 1,551 sq. m net conv & 585 sq. m net comp. Permission Issued Jan 2014 (Application Ref: PP 11/02496/FULL)		585	6,822	3.99	0	0.00	0.00	0.00
Sub Total	10,517	9,029		27.69		10.40	11.55	12.51
East Fife								
Tesco Replacement, South Road, Cupar - Gross 4,294 sq m (25% comp) (Application Ref: 08/01079/EFULL)	1,074	644	6,822	4.40	3	0.13	0.15	0.16
Aldi, South Road, Cupar. 1,587sq.m Gross (1,140 sq m net) (conv/comp 74:26). (13/03752/FULL)		296	4,585	1.40	0	0.00	0.00	0.00
Sub Total		940	11,407	5.80		0.13	0.15	0.16

Table 7: Other Comparison Retail Applications above 2,500 sq.m gross, not treated as Deductions from Capacity

	Floorspace sq. m		Average turnover ratio £/sq. m	2014 Turnover £m
	Gross	Net		
West Fife				
Pilmuir Works redevelopment, Dunfermline - Total 5,496 sq. m gross of which 4,276 sq. m gross is intended for comparison retailing. Consent Issued (Application Ref: PP 11/01419/FULL)	4,276	2,566	4,000	10.3
Aldi inc Mixed Use, Donnibristle Hillend Industrial Estate, Dalgety Bay - Proposed as 1,574sqm gross, 1,125sq.m net, (74% conv/26% comp split). Pending Consideration (Application Ref: 13/02953/PPP)		293	4,580	1.34
Mid Fife				
Kingslaw Village and Burnside Neighbourhood, Kirkcaldy (2x neighbourhood centres with retail) - Phase 1, Kingslaw Village: neighbourhood centre (14 retail units of 45 sq. m each (630 sq. m), 6 retail units of 128 sq. m each (768 sq. m). Phase 3, Burnside Neighbourhood. 3 comparison retail units of 560 sq. m, 580 sq. m & 720 sq. m gross. Application Approved Subject to Legal Agreement (Application Ref: 10/01774/EIA)	3,258	2,118	2,342	4.96

Table 8.1: Summary of Capacity for Comparison Goods Floorspace in West Fife

West Fife Catchment Area	2014	2019	2024
Total Available Comparison Goods Expenditure (£m)	355.37	402.57	469.83
Net Flow of Expenditure (%)	-22%	-22%	-22%
Net Flow of Expenditure (£m)	-78.18	-88.56	-103.36
Retained Expenditure (£m)	277.19	314.00	366.46
Turnover of Existing Facilities (£m)	227.08	252.19	278.72
Turnover of Commitments (£m)	16.17	17.95	19.84
Residual Expenditure Capacity (£m)	33.94	43.85	67.91
Comparison Goods Floorspace Turnover per sq. m (£)	4,700	5,220	5,769
Net Floorspace Equivalent (sq. m)	7,221	9,330	14,448
Gross Floorspace Equivalent (sq. m)	11,110	14,355	22,228

Notes:

1. 2012 prices
2. Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.1 and turnover of commitments from Table 6.1
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Comparison goods turnover based on a turnover ratio of £4,700 per sq. m net for West and Mid Fife in 2014
5. Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent assumes a gross to net ratio of 65%
7. Capacity for comparison goods floorspace includes bulky goods
8. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 8.2: Summary of Capacity for Comparison Goods Floorspace in Mid Fife

Mid Fife Catchment Area	2014	2019	2024
Total Available Comparison Goods Expenditure (£m)	447.28	506.29	590.13
Net Flow of Expenditure (%)	-13%	-13%	-13%
Net Flow of Expenditure (£m)	-58.15	-65.82	-76.72
Retained Expenditure (£m)	389.13	440.47	513.41
Turnover of Existing Facilities (£m)	394.55	438.19	484.27
Turnover of Commitments (£m)	27.69	30.75	33.98
Residual Expenditure Capacity (£m)	-33.11	-28.47	-4.84

Notes:

1. 2012 prices
2. Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.2 and turnover of commitments from Table 6.1
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Comparison goods turnover based on a turnover ratio of £4,700 per sq. m net for West and Mid Fife in 2014
5. Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent assumes a gross to net ratio of 65%
7. Capacity for comparison goods floorspace includes bulky goods
8. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 8.3: Summary of Capacity for Comparison Goods Floorspace in East Fife

East Fife Catchment Area	2014	2019	2024
Total Available Comparison Goods Expenditure (£m)	194.72	220.18	256.52
Net Flow of Expenditure (%)	-58%	-58%	-58%
Net Flow of Expenditure (£m)	-112.94	-127.71	-148.78
Retained Expenditure (£m)	81.78	92.48	107.74
Turnover of Existing Facilities (£m)	67.48	74.94	82.82
Turnover of Commitments (£m)	5.80	6.44	7.12
Residual Expenditure Capacity (£m)	8.51	11.10	17.80
Comparison Goods Floorspace Turnover per sq. m	3,500	3,887	4,296
Net Floorspace Equivalent (sq. m)	2,431	2,855	4,144
Gross Floorspace Equivalent (sq. m)	3,740	4,393	6,375

Notes:

1. 2012 prices
2. Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.3 and turnover of commitments from Table 6.1
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Comparison goods turnover based on a turnover ratio of £3,500 per sq. m net for East Fife in 2014
5. Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent assumes a gross to net ratio of 65%
7. Capacity for comparison goods floorspace includes bulky goods
8. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 8.4: Summary of Capacity for Bulky Goods Floorspace in West Fife

West Fife Catchment Area	2014	2019	2024
Total Available Bulky Goods Expenditure (£m)	82.71	94.52	111.39
Net Flow of Expenditure (%)	-10%	-10%	-10%
Net Flow of Expenditure (£m)	-8.27	-9.45	-11.14
Retained Expenditure (£m)	74.44	85.07	100.25
Turnover of Existing Facilities (£m)	24.25	26.93	29.76
Turnover of Commitments (£m)	0.00	0.00	0.00
Residual Expenditure Capacity (£m)	50.19	58.14	70.49
Bulky Goods Floorspace Turnover per sq. m (£)	2,000	2,221	2,455
Net Floorspace Equivalent (sq. m)	25,096	26,174	28,714
Gross Floorspace Equivalent (sq. m)	29,525	30,793	33,781

Notes:

1. 2012 prices
2. Total available bulky goods expenditure obtained from Table 3.2, net flow of expenditure obtained from Table 5.2, turnover of existing bulky goods floorspace extracted from Table 4.1 and turnover of commitments from Table 6.2
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Bulky goods turnover per sq. m based on a turnover ratio of £2,000 per sq. m net in 2014
5. Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent assumes a gross to net ratio of 85%
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

Table 8.5: Summary of Capacity for Bulky Goods Floorspace in Mid Fife

Mid Fife Catchment Area	2014	2019	2024
Total Available Bulky Goods Expenditure (£m)	106.60	121.72	143.26
Net Flow of Expenditure (%)	-9%	-9%	-9%
Net Flow of Expenditure (£m)	-9.59	-10.95	-12.89
Retained Expenditure (£m)	97.00	110.76	130.37
Turnover of Existing Facilities (£m)	44.58	49.51	54.72
Turnover of Commitments (£m)	10.40	11.55	12.51
Residual Expenditure Capacity (£m)	42.02	49.70	63.14
Bulky Goods Floorspace Turnover per sq.m (£)	2,000	2,221	2,455
Net Floorspace Equivalent (sq. m)	21,012	22,378	25,720
Gross Floorspace Equivalent (sq. m)	26,265	27,972	32,150

Notes:

1. 2012 prices
2. Total available bulky goods expenditure obtained from Table 3.2, net flow of expenditure obtained from Table 5.2, turnover of existing bulky goods floorspace extracted from Table 4.2 and turnover of commitments from Table 6.2
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Bulky goods turnover per sq. m based on a turnover ratio of £2,000 per sq. m net in 2014
5. Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent assumes a gross to net ratio of 85%
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

Table 8.6: Summary of Capacity for Bulky Goods Floorspace in East Fife

East Fife Catchment Area	2014	2019	2024
Total Available Bulky Goods Expenditure (£m)	45.49	51.88	61.04
Net Flow of Expenditure (%)	-84%	-84%	-84%
Net Flow of Expenditure (£m)	-38.21	-43.58	-51.27
Retained Expenditure (£m)	7.28	8.30	9.77
Turnover of Existing Facilities (£m)	0	0	0
Turnover of Commitments (£m)	0.13	0.15	0.16
Residual Expenditure Capacity (£m)	7.15	8.15	9.61
Bulky Goods Floorspace Turnover per sq m (£)	2,000	2,221	2,455
Net Floorspace Equivalent (sq m)	3,573	3,671	3,914
Gross Floorspace Equivalent (sq m)	4,203	4,319	4,604

Notes:

1. 2012 prices
2. Total available bulky goods expenditure obtained from Table 3.2, net flow of expenditure obtained from Table 5.2 and turnover of commitments from Table 6.2
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Bulky goods turnover per sq. m based on a turnover ratio of £2,000 per sq. m net in 2014
5. Turnovers of commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent assumes a gross to net ratio of 85%
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

Table 9.1: Sensitivity Testing: Summary of Capacity for Comparison Goods Floorspace in West Fife – Increase in Clawback to 2024

West Fife Catchment Area	2014	2019	2024
Total Available Comparison Goods Expenditure (£m)	355.37	402.57	469.83
Net Flow of Expenditure (%)	-22%	-22%	-22%
Net Flow of Expenditure (£m)	-78.18	-88.56	-103.36
Retained Expenditure (£m)	277.19	314.00	366.46
Leakage 30% (from Table 5.1)	83.16	94.20	109.94
Clawback of 10% leakage (£m)	8.32	9.42	10.99
Clawback of 20% leakage (£m)	16.63	18.84	21.99
Turnover of Existing Facilities (£m)	236.42	262.56	290.17
Turnover of Commitments (£m)	6.83	7.59	8.39
Residual Expenditure Capacity (£m)	33.94	43.85	67.91
Residual Expenditure Capacity (£m) with 10% clawback	42.26	53.27	78.90
Comparison Goods Floorspace Turnover per sq. m (£)	4,700	5,220	5,769
Net Floorspace Equivalent (sq. m)	8,991	10,206	13,677
Gross Floorspace Equivalent (sq. m)	13,832	15,702	21,042
Residual Expenditure Capacity (£m) with 20% clawback	50.57	62.69	89.89
Comparison Goods Floorspace Turnover per sq. m (£)	4,700	5,220	5,769
Net Floorspace Equivalent (sq. m)	10,760	12,011	15,583
Gross Floorspace Equivalent (sq. m)	16,554	18,478	23,974

Notes:

1. 2012 prices
2. Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.1 and turnover of commitments from Table 6.1
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Comparison goods turnover based on a turnover ratio of £4,700 per sq. m net for West and Mid Fife in 2014
5. Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent assumes a gross to net ratio of 65%
7. Capacity for comparison goods floorspace includes bulky goods
8. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 9.2: Sensitivity Testing: Summary of Capacity for Comparison Goods Floorspace in Mid Fife – Increase in Clawback to 2024

Mid Fife Catchment Area	2014	2019	2024
Total Available Comparison Goods Expenditure (£m)	447.28	506.29	590.13
Net Flow of Expenditure (%)	-13%	-13%	-13%
Net Flow of Expenditure (£m)	-58.15	-65.82	-76.72
Retained Expenditure (£m)	389.13	440.47	513.41
Leakage 23% (from Table 5.1)	89.50	101.31	118.09
Clawback of 10% leakage (£m)	8.95	10.13	11.81
Clawback of 20% leakage (£m)	17.90	20.26	23.62
Turnover of Existing Facilities (£m)	394.55	438.19	484.27
Turnover of Commitments (£m)	27.69	30.75	33.98
Residual Expenditure Capacity (£m)	-33.11	-28.47	-4.84
Residual Expenditure Capacity (£m) with 10% clawback	-24.16	-18.33	6.97
Comparison Goods Floorspace Turnover per sq. m (£)	4,700	5,220	5,769
Net Floorspace Equivalent (sq. m)			1,209
Gross Floorspace Equivalent (sq. m)			1,860
Residual Expenditure Capacity (£m) with 20% clawback	-15.21	-8.20	18.78
Comparison Goods Floorspace Turnover per sq. m (£)			5,769
Net Floorspace Equivalent (sq. m)			3,256
Gross Floorspace Equivalent (sq. m)			5,009

Notes:

1. 2012 prices
2. Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.2 and turnover of commitments from Table 6.1
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Comparison goods turnover based on a turnover ratio of £4,700 per sq. m net for West and Mid Fife in 2014
5. Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent assumes a gross to net ratio of 65%
7. Capacity for comparison goods floorspace includes bulky goods
8. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 9.3: Sensitivity Testing: Summary of Capacity for Comparison Goods Floorspace in East Fife – Increase in Clawback to 2024

East Fife Catchment Area	2014	2019	2024
Total Available Comparison Goods Expenditure (£m)	194.72	220.18	256.52
Net Flow of Expenditure (%)	-58%	-58%	-58%
Net Flow of Expenditure (£m)	-112.94	-127.71	-148.78
Retained Expenditure (£m)	81.78	92.48	107.74
Leakage 80% (from Table 5.1)	65.43	73.98	86.19
Clawback of 5% leakage (£m)	3.27	3.70	4.31
Clawback of 10% leakage (£m)	6.54	7.40	8.62
Turnover of Existing Facilities (£m)	67.48	74.94	82.82
Turnover of Commitments (£m)	5.80	6.44	7.12
Residual Expenditure Capacity (£m)	8.51	11.10	17.80
Residual Expenditure Capacity (£m) with 5% clawback	11.78	14.80	22.11
Comparison Goods Floorspace Turnover per sq. m (£)	3,500	3,887	4,296
Net Floorspace Equivalent (sq. m)	3,366	3,807	5,147
Gross Floorspace Equivalent (sq. m)	5,178	5,857	7,919
Residual Expenditure Capacity (£m) with 10% clawback	15.05	18.50	26.42
Comparison Goods Floorspace Turnover per sq. m (£)	3,500	3,887	4,296
Net Floorspace Equivalent (sq. m)	4,300	4,759	6,150
Gross Floorspace Equivalent (sq. m)	6,616	7,321	9,462

Notes:

1. 2012 prices
2. Total available comparison goods expenditure obtained from Table 3.1, net flow of expenditure obtained from Table 5.1, turnover of existing facilities from Table 4.3 and turnover of commitments from Table 6.1
3. Commitments as agreed with Fife Council (as per Table 6.1)
4. Comparison goods turnover based on a turnover ratio of £4,700 per sq. m net for West and Mid Fife in 2014
5. Turnovers of existing facilities and commitments projected utilising Experian Retail Planner Briefing Note 11 (October 2013) Table 4b forecast sales densities (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent assumes a gross to net ratio of 65%
7. Capacity for comparison goods floorspace includes bulky goods
8. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 9.4: Sensitivity Testing: Summary of Capacity for Bulky Goods Floorspace in West Fife – Increase in Clawback to 2024

West Fife Catchment Area	2014	2019	2024
Total Available Bulky Goods Expenditure (£m)	82.71	94.52	111.39
Net Flow of Expenditure (%)	-10%	-10%	-10%
Net Flow of Expenditure (£m)	-8.27	-9.45	-11.14
Retained Expenditure (£m)	74.44	85.07	100.25
Leakage 21% (from Table 5.2)	15.63	17.86	21.05
Clawback of 10% leakage (£m)	1.56	1.79	2.11
Clawback of 20% leakage (£m)	3.13	3.57	4.21
Turnover of Existing Facilities (£m)	24.25	26.93	29.76
Turnover of Commitments (£m)	0.00	0.00	0.00
Residual Expenditure Capacity (£m)	50.19	58.14	70.49
Residual Expenditure Capacity (£m) with 10% clawback	51.76	59.92	72.59
Bulky Goods Floorspace Turnover per sq. m (£)	2,000	2,221	2,455
Net Floorspace Equivalent (sq. m)	25,878	26,978	29,572
Gross Floorspace Equivalent (sq. m)	30,444	31,739	34,790
Residual Expenditure Capacity (£m) with 20% clawback	53.32	61.71	74.70
Bulky Goods Floorspace Turnover per sq. m (£)	2,000	2,221	2,455
Net Floorspace Equivalent (sq. m)	26,659	27,783	30,429
Gross Floorspace Equivalent (sq. m)	31,364	32,685	35,799

Notes:

1. The classification of what is defined as bulky goods is as defined in Experian Retail Planner Briefing Note 11 (Oct' 2013) Appendix 6
2. Only 'bulky goods' stores in the retail warehouse parks have been included in the calculation of turnover of existing facilities (from Table 4.1)
3. An estimated 30% of Argos' turnover has been included as bulky
4. Commitments as agreed with Fife Council (from Table 6.2)
5. Bulky goods turnover/ sq. m based on an average turnover ratio of £2,000 per sq. m net in 2014 and grown using Experian Retail Planner Briefing Note 11 (October 2013) Table 4b Sales density growth rates (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent for bulky goods floorspace assumes a gross to net ratio of 85%
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

Table 9.5: Sensitivity Testing: Summary of Capacity for Bulky Goods Floorspace in Mid Fife – Increase in Clawback to 2024

Mid Fife Catchment Area	2014	2019	2024
Total Available Bulky Goods Expenditure (£m)	106.60	121.72	143.26
Net Flow of Expenditure (%)	-22%	-22%	-22%
Net Flow of Expenditure (£m)	-23.45	-26.78	-31.52
Retained Expenditure (£m)	83.15	94.94	111.74
Leakage 19% (from Table 5.2)	15.80	18.04	21.23
Clawback of 10% leakage (£m)	1.58	1.80	2.12
Clawback of 20% leakage (£m)	3.16	3.61	4.25
Turnover of Existing Facilities (£m)	43.79	48.63	53.75
Turnover of Commitments (£m)	10.40	11.55	12.51
Residual Expenditure Capacity (£m)	28.96	34.76	45.48
Residual Expenditure Capacity (£m) with 10% clawback	30.54	36.56	47.61
Bulky Goods Floorspace Turnover per sq. m (£)	2,000	2,221	2,455
Net Floorspace Equivalent (sq. m)	15,269	16,462	19,394
Gross Floorspace Equivalent (sq. m)	17,963	19,367	22,816
Residual Expenditure Capacity (£m) with 20% clawback	32.12	38.37	49.73
Bulky Goods Floorspace Turnover per sq. m (£)	2,000	2,221	2,455
Net Floorspace Equivalent (sq. m)	16,059	17,274	20,259
Gross Floorspace Equivalent (sq. m)	18,892	20,322	23,834

Notes:

1. The classification of what is defined as bulky goods is as defined in Experian Retail Planner Briefing Note 11 (Oct' 2013) Appendix 6
2. Only 'bulky goods' stores in the retail warehouse parks have been included in the calculation of turnover of existing facilities (from Table 4.2)
3. An estimated 30% of Argos' turnover has been included as bulky
4. Commitments as agreed with Fife Council (from Table 6.2)
5. Bulky goods turnover/ sq. m based on an average turnover ratio of £2,000 per sq. m net in 2014 and grown using Experian Retail Planner Briefing Note 11 (October 2013) Table 4b Sales density growth rates (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
6. Gross floorspace equivalent for bulky goods floorspace assumes a gross to net ratio of 85%
7. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

Table 9.6: Sensitivity Testing: Summary of Capacity for Bulky Goods Floorspace in East Fife – Increase in Clawback to 2024

East Fife Catchment Area	2014	2019	2024
Total Available Bulky Goods Expenditure (£m)	45.49	51.88	61.04
Net Flow of Expenditure (%)	-84%	-84%	-84%
Net Flow of Expenditure (£m)	-38.21	-43.58	-51.27
Retained Expenditure (£m)	7.28	8.30	9.77
Leakage 85% (from Table 5.2)	6.19	7.06	8.30
Clawback of 5% leakage (£m)	0.31	0.35	0.42
Clawback of 10% leakage (£m)	0.62	0.71	0.83
Turnover of Existing Facilities (£m)	0	0	0
Turnover of Commitments (£m)	0.13	0.15	0.16
Residual Expenditure Capacity (£m)	7.15	8.15	9.61
Residual Expenditure Capacity (£m) with 5% clawback	7.45	8.51	10.02
Bulky Goods Floorspace Turnover per sq. m (£)	2,000	2,221	2,455
Net Floorspace Equivalent (sq. m)	3,727	3,830	4,083
Gross Floorspace Equivalent (sq. m)	4,385	4,506	4,803
Residual Expenditure Capacity (£m) with 10% clawback	7.76	8.86	10.44
Bulky Goods Floorspace Turnover per sq. m (£)	2,000	2,221	2,455
Net Floorspace Equivalent (sq. m)	3,882	3,989	4,252
Gross Floorspace Equivalent (sq. m)	4,567	4,693	5,002

Notes:

1. The classification of what is defined as bulky goods is as defined in Experian Retail Planner Briefing Note 11 (Oct' 2013) Appendix 6
2. Commitments as agreed with Fife Council (from Table 6.2)
3. Bulky goods turnover/ sq. m based on an average turnover ratio of £2,000 per sq. m net in 2014 and grown using Experian Retail Planner Briefing Note 11 (October 2013) Table 4b Sales density growth rates (2015, 2.2%; 2016-2020, 2.1%; 2021-2030, 2.0%)
4. Gross floorspace equivalent for bulky goods floorspace assumes a gross to net ratio of 85%
5. All floorspace figures are indicative only and the 'capacity' for a particular proposal will depend upon the trading characteristics of the proposal and specific net sales area and turnover per sq. m of any relevant bulky goods proposal

