

Fife Council



Fife Retail Capacity Study 2018

December 2018

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In association with Ryden

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Appendix 1 Fife retail catchment areas- postcode sector composition and survey zones

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1 Introduction

1.1 Purpose

1.1.1 The Fife Retail Capacity Study 2018 is the latest in the series of annual retail capacity studies produced by consultants for Fife Council. These follow a similar format, with updates to the retail capacity forecasts every year and updates on retail market conditions every second year. The 2018 Study includes a review of the retail market conditions by Ryden LLP in addition to the analysis of retail capacity.

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

1.2 List of updates

1.2.1 The Fife Retail Capacity Study 2018 contains the following updates:

- Retail capacity forecasts for 2018-23, 2023-28 and combined 2018-28 for convenience and comparison expenditure
- All values are expressed in constant 2017 prices (previously 2016 prices)
- Projected population for the updated periods, based on the 2016 based projections by National Records Scotland (NRS)
- The latest Experian retail expenditure estimates (2016 based) for the three retail catchment areas in Fife, updated to 2018.
- Experian expenditure forecasts to 2028 for convenience goods and Pitney Bowes based forecasts for comparison expenditure to 2028, which are closer to the household survey-based findings in Fife for comparison expenditure
- Updated research information (2017) on visitor spending in Fife
- Updated retail floorspace in Fife for 2018, provided by Experian Goad, plus information on major stores/ developments not covered by Experian
- Updated store average turnover/ floorspace data from the 2018 Retail Rankings in 2017 prices

- Updated list of major retail planning consents and commitments

1.2.2 It is not considered that there is any need to adjust the shopping patterns of Fife residents from the NEMS household interview surveys in 2016, but the updated information on visitor expenditure in Fife is incorporated for 2018.

1.2.3 In addition, the following updates to the 2016 Study are included:

- Summary of the planning policy framework on town centres and retailing covering Fife;
- Appraisal of retail trends and retail market demand in Fife;
- Broad overview of the general quality of the retail offer in the main towns;
- Interpretation of the overall findings

1.3 Fife household survey

1.3.1 In 2016, Fife Council commissioned NEMS Market Research to undertake a household telephone interview survey covering 1,800 households, with questions on shopping patterns and use and perceptions of the main town centres in Fife.

1.3.2 The interview survey was divided into quotas applied to ten zones, and at a higher level, the three retail catchment areas. For ease of reference, these areas are shown in Appendix 1 and the list of questions is provided in Appendix 2. The data output tables produced by NEMS Market Research, showing the questions and responses, are provided in separate documents held by Fife Council.

2 Retail catchment areas and population

2.1 Sub area retail catchments

2.1.1 As in previous annual Retail Capacity Studies in the series, Fife has been divided into three retail catchment areas which form the basis of the analysis. These are West Fife, Mid Fife and East Fife, as shown on Map 2.1.

2.1.2 Note that the three catchment areas are based on postcode sector geography, as shown in Appendix 1. The match of catchment boundaries with the Fife Council area is very close, but not exact, and there have been some recent changes to the postcode sectors, but these have not affected the overall catchment populations. Map 2.1 is the same as in the 2016 and 2017 Retail Capacity Studies for consistency.

2.2 Population projections

2.2.1 The sum of the three catchment area populations matches the total for the Fife Council area, as the minor boundary differences

relate to areas with no population. Population data for the catchment areas derives from the 2011 Census, projected forward. National Records Scotland (NRS) do not publish 'data zone'-based information for postcode sector geography, so 2011 is the only baseline.

2.2.2 The current and projected populations for Fife and the three retail catchment areas is shown in Table 2.1. The projections for Fife are the published 2016 based population projections by NRS. Experian provided their own population projections for each of the three retail catchment areas for this study, which have been controlled to the 2016 based projection totals for Fife in the report- see Appendix 3.

2.2.3 There is a projected increase in the Council area population of 3,778 from 2018-23 (+1%) and 2,593 from 2023-28 (+0.6%).

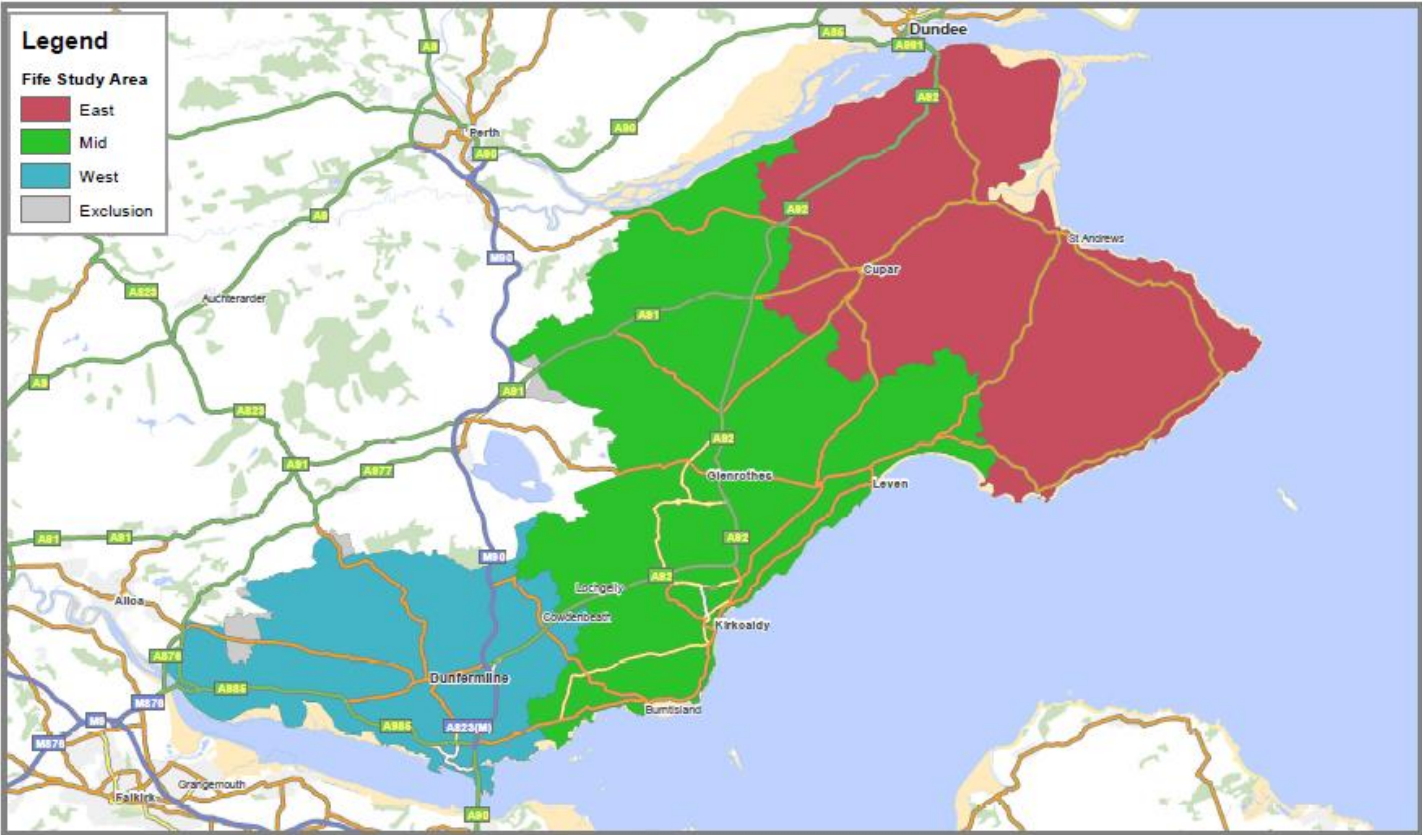
Table 1.1
Fife retail catchment area population projections

Retail catchment area	Census 2011	2018	2023	2028
West Fife	123,608	129,038	130,656	132,091
Mid Fife	181,860	180,818	182,340	182,995
East Fife	59,730	62,246	62,884	63,386
Total Fife	365,198	372,102	375,880	378,473

Note

The 2011 data is taken directly from the 2011 Census, Scotland, based on postcode sector population data for each catchment. The projected populations for 2018,2023 and 2028 derive from the Experian projections for each catchment area, re-apportioned to the NRS 2016 based population projections for Fife as a whole. See Appendix 1

Map 2.1 Fife Retail Catchment Areas



Source: Experian. Note- Exclusion refers to parts of postcode sectors where the population is so small that it is suppressed in official sources

3 Planning policy framework

3.1 Introduction

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

3.2 Scottish Planning Policy

3.2.1 The SPP was published in June 2014. It has a strong focus on encouraging the diversity of uses and vitality within town centres generally, alongside support for improvement to the quality of the centres as places to live and work.

3.2.2 Preparation of the 2014 SPP was undertaken in parallel with the External Advisory Group's Report to the Scottish Government entitled Community and Enterprise in Scotland's Town Centres, published in June 2013. This document sets out a 'town centres first' principle, where the health of town centres is given central focus. A list of health check indicators is contained in Appendix A of the 2014 SPP. Also, a detailed methodology on application of performance indicators is set out in the USP (Understanding Scottish Places) Town Audit 2015.

3.2.3 The 'town centres first' policy is promoted in the 2014 SPP, when planning for uses which attract significant numbers of people, including retail, commercial and leisure uses, offices, community and cultural facilities. Plans should identify a network of centres (city centres, town centres, local centres and commercial centres), explaining how they interrelate. For commercial centres, the function should be specified to protect town centres. Health checks of town centres should be undertaken regularly to assess their vitality and viability and strengths/ weaknesses. These checks should be used to develop town centre strategies.

3.2.4 Development plans should adopt the sequential approach to preferred locations for uses which generate significant footfall, including retailing and other uses, in the following order of preference:

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

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

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

3.3 Reforming the planning system

3.3.1 The Planning Scotland Bill was introduced to Parliament in December 2017. It includes measures intended to strengthen the planning system's contribution to inclusive growth and empowering communities. There is a proposal to combine the National Planning Framework (NPF) and the SPP 'to better reflect national and regional planning priorities and to make local development plans simpler'. This *includes abolition of strategic development plans, which include the SESplan and TAYplan, among others*. There are many other facets, and to date, over 300 amendments to the Bill have been made.

3.4 SESplan

3.4.1 The first (and current) SESplan was approved by the Scottish Ministers in 2013. The second (Proposed) SESplan was submitted to the Scottish Ministers in June 2017. The examination was completed in July 2018 and the report has been submitted to the Scottish Ministers for approval, in whole or part.

3.4.2 The area covers the West Fife retail catchment area and most of the Mid Fife catchment, excluding a small part to the north

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

3.5 TAYplan

3.5.1 The current and 2nd TAYplan was approved in October 2017. In Fife, the TAYplan covers the East Fife retail catchment area and a small part of the Mid Fife retail catchment area including Falkland and Newburgh.

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

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

3.6 FIFEplan

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

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

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

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

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

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

Town Centres

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

Commercial Centres

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

4 National trends in retailing

4.1 Introduction

4.1.1 This section describes the national trends in retailing which form the context for assessment of the retail market in Fife.

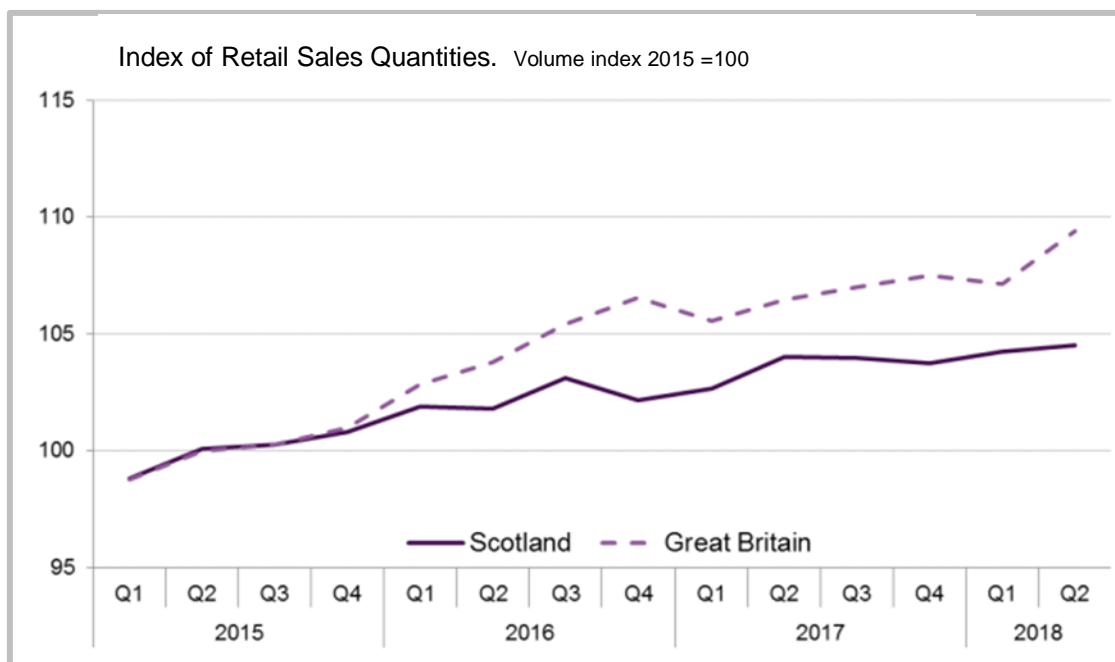
4.2 Economy and retail sales

4.2.1 The Scottish economy grew by 1.7% between 2017 (Q2) and 2018 (Q2), compared to 1.2% for the UK. Anxiety over the outcome of Brexit negotiations is affecting business confidence generally, including investment in retail and commercial property.

4.2.2 Consumer expenditure on retail goods in Scotland has grown very slowly indeed since 2015 - see Figure 4.1. This has added to retailer challenges as they face property, staff and supply chain cost pressures. Sales grew by 0.3% during the second quarter of 2018, and by 0.5% on an annual basis. This is lower than the recorded for Great Britain over the same 12-month period (2.8%).

Figure 4.1 Scottish economy: retail sales growth

Source- Scottish Government



4.3 National market overview

4.3.1 The retail property market is increasingly concentrating on large cities, destination shopping malls, and retail parks, with increasing online shopping having a marked influence. The current round of closures among multiple retailers is further focusing the market on these high-demand locations. The concentration of demand into fewer locations affects retail property rents, which are static in most locations. In turn, developers and

investors are targeting locations which can support national retailers, often in purpose-built premises, on long leases, with the prospect of rising rents.

4.3.2 Expansionary retailers in the current market phase are in the discount foodstore sector (Lidl and Aldi for example), budget mixed goods retailing (B&M and Home Bargains for example), pharmacies, fast food and coffee sectors. There is some resurgence in mid-market activity as consumer expenditure

on household goods increases, in sectors such as furniture, furnishings and kitchens. The pet sector is also buoyant. This is driving renewed retailer activity which is benefiting mainly modern, purpose-built retail locations.

4.3.3 On-line retailing continues to grow, and surveys indicate that the proportion of retail spending on comparison goods by internet is currently around 25% and more in different areas of the country. The process is hastening the end of many shops in the high streets. The rate of shop closures has been given increased coverage in the Press, combined with a widespread perception that there are now probably too many shops which are not of a quality or offer to maintain customer attraction, compared to the past.

4.3.4 The most notable store closure programmes are among banks, travel agents, variety stores, department stores and estate agents, where sales and services are migrating online and portfolios (and sometimes store buildings) may simply be too large for the emerging market.

4.3.5 Market interest in retail parks is mostly in the form of developers and operators seeking relaxation of restrictions on the ranges of goods that can be sold and reconfiguration of existing space to target more buoyant market sectors; not demand for additional retail parks.

4.3.6 In the grocery sector, market interest in developing large supermarkets has expired, with the current focus on discount foodstores and small convenience stores continuing.

4.3.7 The most active commercial sector has been leisure uses. Restaurants, bars, cafes, cinemas, and hotels are complementary to retailing. Among smaller towns, the main interest has been in restaurants and cafes, often replacing former retail occupiers. There is now some evidence of market saturation within the restaurant/ café/ take-away sector, with closures of mid-market chains and the short life-span of many individual restaurants. Changing life-styles include more people choosing to eat at home rather than going out, compared to the recent past. The number of traditional pubs has declined substantially in recent years.

4.3.8 Personal services including beauty and healthcare have proved enduring in town

centres in recent years. On the other hand, the closures of banks in the high streets has been extreme over the last two years, with little representation remaining, except in the larger town centres.

5 Fife retail market overview

5.1 Introduction

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

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

5.1.3 The convenience and comparison floorspace in the main towns is shown in the tables in sections 6 and 8. The retail park occupiers are listed in Appendix 6.

5.2 Fife overview

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

5.2.2 Fife's large town centres face a continuing competitive challenge to retain their retail and service mix and maintain their market positions. Retail vacancy rates in the town

centres are higher than the Scottish average, apart from St Andrews.

5.2.3 On convenience shopping, the market interest in Fife is mainly on the development of additional discount foodstores, as shown in the list of planning consents in Table 6.11. In line with national trends, there is no evidence of market interest in developing more traditional mid-size supermarkets and superstores.

5.2.4 On comparison retailing, there are differences in performance between the three retail catchment areas in Fife. In West Fife, the Kingsgate Centre in Dunfermline is performing strongly, based on evidence on retail rents and spending patterns (which determine the turnover/floorspace ratios). Halbeath Retail Park also appears to be trading well and has consent for further expansion.

5.2.5 In Mid Fife, Kirkcaldy and Glenrothes town centres are performing less strongly than Dunfermline and in East Fife, St Andrews performs very strongly for its size.

5.2.6 **Numbers of shops in the town centres-** Table 5.1 shows the number of convenience and comparison shops combined in each of the town centres and the trend since 2012, based on Goad surveys. There has been no overall change in numbers in Dunfermline but decline in all the other town centres from 2012-18. Limited proportional decline in Kirkcaldy and Glenrothes is evident, with the greatest declines in Cupar and Leven. The recorded figures for 2016 reveal some fluctuations, not just straight declines.

Table 5.1
Numbers of occupied convenience and comparison shops in the main town centres in Fife

Town Centre	2012	2016	2018	% change 2012-18
Dunfermline	142	149	142	0%
Cowdenbeath	52	46	47	-10%
Kirkcaldy	146	151	137	-6%
Glenrothes	82	81	78	-5%
Leven	63	56	56	-11%
Cupar	70	62	61	-13%
St Andrews	126	114	114	-10%

Note: source -Goad surveys 2012, 2016 and 2018

5.2.7 **In West Fife**, current zone A retail rents in *Dunfermline town centre* (Table 5.2) have not changed since 2016. They continue to independently corroborate evidence from the household survey and the associated retail expenditure analysis that the town centre is performing at a much higher level than others in Fife.

5.2.8 Most of this performance relates the Kingsgate Shopping Centre. Rental levels have been maintained for some time, unlike many of the other towns. The vacancy rate is higher than the national average, but this is probably because of weaker quarters within the town centre (Table 5.3). It has risen since 2016. Multiple retailer representation is good at nearly 50%, which has been maintained since 2016-see Table 5.4.

5.2.9 The adjacent *Carnegie Retail Park* contains a mix of DIY, furnishings, budget mixed goods retailing and budget clothing offer to complement the town centre. *Halbeath Retail Park* has a good range of retailers and is located close to the Leisure Park. It is likely to be trading well. Indeed, there is planning consent for a major extension- see Table 8.11. A list of retailers on these two retail parks is provided in Appendix 6.

5.2.10 The smaller centre of *Cowdenbeath* has a limited non-food retail offer and it is not performing very well, as indicated by the zone A rents in Table 5.2, and in Table 5.3 showing the highest high vacancy rate, and a decline in multiple representation since 2016 (Table 5.4). Development of the retail consents at North End Park will improve the position. Cowdenbeath is close to Dunfermline, and residents can readily visit these larger facilities.

5.2.11 **In Mid Fife**, comparison shopping in the town centres of *Kirkcaldy and Glenrothes* attract much lower zone A rents, which reflect weaknesses compared to Dunfermline town centre (Table 5.2), where the turnover/floorspace ratio is also much greater (Tables 8.8 and 8.9). The situation corresponds with the findings of the 2016 household survey. Retail rents in Kirkcaldy are similar to those in 2016. In Glenrothes, rents but have fallen to lower levels in 2018.

5.2.12 Vacancy rates are relatively high in Kirkcaldy and have increased slightly since

2016, as shown in Table 5.3. The proportion of multiple retailer representation in Kirkcaldy is only slightly lower than Dunfermline but has improved since 2016-see Table 5.4.

5.2.13 As recorded in 2016, Kirkcaldy town centre has detractions for shopping, notably its extended linear form, and the empty shell of the Postings Centre, without Tesco, among others. Essentially, there are probably too many shops without concentrated quality into fewer, high quality- retailers.

5.2.14 In Glenrothes town centre, the Kingdom Centre mall appears very well maintained and clean, but the property is rather from a past era. The closure of Dunnes has not assisted. It would greatly benefit from further investment, but the options are probably limited in the current, tough retail market. In Glenrothes, the vacancy rates are lower than Kirkcaldy, but have increased since 2016. Multiple retailer representation in Glenrothes is high, and it has decreased slightly since 2016. The vacancy rate is still well above the national average. Development of the retail consent on the CIWO site is progressing.

5.2.15 *Fife Central Retail Park* has performed strongly, as indicated by the wide range of offer and popularity from the household survey findings on main shopping destinations. (Figure 8.1). Recent investment by Hammerson has further strengthened the retail offer, as shown in Appendix 6, and this retail park is easily the largest in Fife. It is a competing attraction to Kirkcaldy and Glenrothes town centres.

5.2.16 *Saltire Retail Park* in Glenrothes has a range of mainly budget-orientated retailers. Elsewhere in Mid Fife, *Leven town centre* has a limited retail offer. A strong budget-orientated offer exists in the nearby Riverside Retail Park. In terms of servicing the local catchment population, the retail offer is fair in that context, as residents have ready accessibility to Kirkcaldy.

Table 5.2
Zone A retail rents in the main town centres in Fife

	2016 £ per sq ft	2018 £ per sq ft
Dunfermline	60	up to 60
Cowdenbeath	10	5-10
Kirkcaldy	up to 34	16 to 34
Glenrothes	35	10-22
Leven	20	7-24
Cupar	20-25	11-20
St Andrews	60	35 to 60

Source: Ryden

Mostly records of achieved rents and asking rents. There are ranges, and the highest figures are for the very best premises.

Table 5.3
Vacant units in the main town centres in Fife: 2016 and 2018

	2016			2018		
	Vacant units	Total units	Vacancy rate %	Vacant units	Total units	Vacancy rate %
Dunfermline	54	380	14.2%	60	377	15.9%
Cowdenbeath	28	144	19.4%	28	136	20.6%
Kirkcaldy	70	384	18.2%	73	375	19.5%
Glenrothes	30	195	15.4%	33	193	17.1%
Leven	21	166	12.7%	29	162	17.9%
Cupar	21	208	10.1%	28	199	14.1%
St Andrews	6	242	2.5%	7	236	3.0%

Scottish town centre average -2 sources

The Local Data Company, - Conference report Nov. 2017-overall retail vacancy rate

Scottish Retail Consortium, August 2018

Note: vacancy rate= vacant units/ (retail and non-retail service units & vacant units)

Sources: Goad 2018 surveys- (Goad definition of town centres)

Table 5.4
Multiple retailer representation in the main town centres in Fife - 2018

	*Multiple retailers	Convenience & comparison shops	% multiple retailers in 2018	% multiple retailers in 2016
Dunfermline	69	142	49%	48%
Cowdenbeath	14	47	30%	33%
Kirkcaldy	70	137	51%	46%
Glenrothes	48	78	62%	64%
Leven	23	56	41%	36%
Cupar	18	61	30%	27%
St Andrews	42	114	37%	33%
Other- City Centres				
Perth City Centre- <i>Retail Study 2016</i>	79	254	31%	
Dundee- <i>Dundee Retail Review 2015</i>	133	223	60%	
Stirling- <i>Goad 2015/Ryden</i>	105	200	53%	

Note: source -Goad surveys 2018

* refers to multiple retailers only, excluding multiple non-retail services. A multiple is defined as a retailer with 9 or more outlets (Experian).

There are a few local chains with less than 9 outlets, and these are excluded. Charity shops have not been classified as multiples here.

5.2.17 Retail rents in Leven have held up since 2016 (see Table 5.2). The vacancy rate has increased substantially, while at the same time, multiple representation has increased since 2016 (Tables 5.3 and 5.4). This evidence suggests more retailer focus on meeting local demand has occurred, with some retailers falling away.

5.2.18 **In East Fife**, a high proportion of non-food shopping is done in Dundee. The University town of St Andrews is the main shopping centre. It has a large number of shop units with quality multiple retailers in small units which is unusual, plus high-quality independent shops. As recorded in 2016, the retail offer is probably the consequence of being an affluent University town, together with being a destination for tourists and golfers. Recent research on visitor spending in St Andrews reveal much higher levels than previously estimated.

5.2.19 Zone A rents in St Andrews are high, with no material change since 2016- see Table 5.2. Vacancy rates remain minimal. The proportion of multiple retailers has improved since 2016. Although the proportion of multiples is not especially high, it is not a weakness, as the quality of the independent retailers is high and matches demand from affluent visitors and residents.

5.2.20 Cupar is a local service centre for shopping. Zone A rents are at a moderate level and are lower than recorded in 2016, based on transactions. Vacancy rates have increased since 2016 but are still lower than most other towns in Fife. Multiple retailer representation has improved. As the small town has a moderately affluent catchment, not close to any large centre, Cupar is probably more exposed than before to current trends in retailing, including internet spending and increased attraction of customers to larger centres.

5.3 West Fife- market activity and demand

5.3.1 **Dunfermline-** there has been some activity in the Kingsgate Shopping Centre. New shops have been opened by Bonmarche, VIP Electronic Cigarettes, Fone Care, Sahara ladies' fashion, Glamour Forever brow bar and salon. Both the Card Factory and clothing retailer Shmooz (in the former Flying Tiger unit)

relocated into larger units within the shopping centre.

5.3.2 On High Street, the Post Office relocated from Queen Anne Street into the former WH Smith store. Home Deals/Expressions opened at no. 63-71 (the former Boots property). The Sew Studio craft and sewing store opened in the former Robertson Outerwear store at no. 55 (a spin off store from Sew Yard Crafty), Glamcandy relocated its make-up school and shop from Bruce Street to no. 7, Vapourz opened in no. 76 and Bob & Berts' artisan café is to open in the former McDonalds restaurant unit.

5.3.3 Dunfermline town centre has a good range of independent outlets. Recent store openings include Flower Pixies and Black Star gifts on Bruce Street; on Chalmers Street Sonia Harris Interiors; the Secret Door antiques on Maygate; and on Bridge Street Lime Salon (hairdresser and beauty salon) in a former menswear store and Mr OHM in the former health food store.

5.3.4 The town centre also saw some closures. Poundworld has closed on the High Street. Pink String & Sealing Wax, Colin White Menswear and Premier Health Foods closed on Bridge Street. Stephens the Bakers closed its shop and café on Guildhall Street, and Bubbles Bathrooms on Chalmers Street. To date however Dunfermline appears to have escaped some of the higher profile retail closures.

5.3.5 The leisure sector has been active in the town centre. New restaurants and cafes include: Monterey Jack's on Canmore Street, Café Wynd on Cross Street, Dhoom (Indian street food and Cocktails on New Row (in the former Eastern Buffet Asian restaurant which closed here and at Fife Leisure Park) and Bob & Bert's as noted above. Work has started on the Kinema Restaurant, a global buffet diner in a former nightclub on Carnegie Drive.

5.3.6 Outwith the town centre, Papa John's pizza take-away opened in a new-build unit on Woodmill Road and Tim Hortons coffee shop opened on Hospital Hill, while Greggs closed its take-away there.

5.3.7 Prime Zone A retail rents for Dunfermline town centre remain at £60 per sq.ft., with prime retail property investment yields around 7%.

5.3.8 **Carnegie Retail Park** has recently attracted PureGym to the vacant unit formerly occupied by Halfords, who relocated to Halbeath Retail Park some years ago.

5.3.9 **Halbeath Retail Park** has consent for an extension, including provision for bulky goods and convenience retailing, including Lidl and possibly an M&S Simply Food store- see Table 8.11. The consent has not been developed and occupied to date.

5.3.10 **Fife Leisure Park-** Smash Burger has opened, McDonalds re-vamped its drive thru and restaurant, and Eastern Buffet Asian restaurant has closed.

5.3.11 During the period 2012-18, the number of multiple retailers seeking property in Dunfermline has fluctuated around typically 4 to 6. The 6 current requirements are shown in Table 5.5. Lidl and Snap Fitness are new since the previous retail update for Fife Council.

5.3.12 **Cowdenbeath-** on High Street, Domino's Pizza and Candee Man opened in 2017, Precious Events in 2018, and Moorelands Travel (part of Barrhead Travel) relocated in August 2018. Altered Image closed on Stenhouse Street in 2017.

5.3.13 Property developer London & Scottish Investments began work in October 2018 on an £8.5 million retail development at the former greyhound track, North End Park in Cowdenbeath. On completion a 1,794 sq.m. Lidl and an 1,858 sq.m. B & M will open.

5.3.14 Achieved rents on the High Street range between £5 and £10 per sq.ft. In 2018 there are 4 named retail requirements for Cowdenbeath (Table 5.5).

Table 5.5 West Fife retailer requirements, Winter 2018		
	Unit size requirements sq.m.	Location
Dunfermline Retail		
Lidl	1,300 – 2,460	prominent site in town, district, edge
Topps Tiles	279 – 743	Trade / retail park
Machine Mart	139 - 929	A1 Retail or Quasi-Retail, trade park
Sub total retail	1,718 - 4,132	
Non-retail		
Halfords Autocentre	325 - 557	Trade park
Snap Fitness	372 - 743	Franchise
McDonalds Drive Thru	Min 334	Stand-alone restaurants with Drive-thru lane, Retail & leisure parks, Main arterial routes.
Cowdenbeath Retail		
BrightHouse- retail	93 - 325	High Street or shopping centre
Savers Health and Beauty	186 – 279	High street and shopping centre
Sub total retail	279 - 604	
Non-retail		
Marstons Inns		Site of 0.2 ha to 0.6 ha for development
Vets 4 Pets	139 - 186	Standalone / roadside / retail park
Total West Fife retail requirements only	1,997 - 4,737	

Source: Ryden

5.4 Mid Fife- market activity and demand

5.4.1 **Kirkcaldy** town centre continues to suffer the effects of two large store closures. The Tesco supermarket which closed in the Postings Shopping Centre in 2015 and the BHS Store which closed on the High Street/Mercat Shopping Centre in 2016 both remain vacant. More recent closures and announcements include: on the High Street Next, Semi-Chem, Thorntons and Poundstretcher; in the Mercat Shopping Centre the Present Shop Extra and Subway; and Marks & Spencer on the High Street / Mercat Shopping Centre. Other notable retailers in the town have however survived their latest rounds of national store closures.

5.4.2 Market activity in the town centre has mainly come from independent and specialist retailers. Recent openings include on the High Street, Prestige hair salon, Vapourz (in the former Thorntons unit), Pandora, The Bakers Apprentice, Stuffy Bears, Zion Christian

Bookstore, Kingdom Kilts (relocating from no. 225 to no. 241), Deaf Action, Izzys Bargain Box, Kingdom Comics & Games and Apollo Blinds. Bodycare relocated from the High Street into the former Argos at the Mercat (with High Street frontage).

5.4.3 A Bob & Berts artisan coffee café is to open on the High Street in the former Next unit. The former BHS unit at 134 – 146 High Street was sold in early 2018, however to date no retailer has taken occupation. Only a handful of tenants remain in the Postings Shopping Centre since the closure of Tesco. Owners Columbia Threadneedle are currently understood to be developing plans for the centre.

5.4.4 Planning permission was granted to Lidl to relocate to the former Stagecoach depot site adjacent to Morrisons. Plans are understood to be on hold until 2019.

5.4.5 Recent transaction evidence indicates retail rents on prime pitches in Kirkcaldy as £16 to £34 per sq.ft. and retail yields are around 10%.

5.4.6 Retailer requirements for Kirkcaldy have tended to number around 4 or 5 in recent years. Currently there are 7 seeking representation (Table 5.6), although the mix has broadened to include hotel, leisure and automotive operators. National Tyres Autocare, Snap Gyms and The Works are new to the requirements listings in 2018. Requirements for Glenrothes, and Leven are also listed.

5.4.7 **Fife Central Retail Park** continues to attract investment. The vacant former Homebase unit was demolished and replaced by Wren Kitchens, DW Fitness First sports shop, Oak Furniture Land and Sofology plus Greggs and Costa Coffee all during 2017. In 2018 Tapi carpets opened in the former PC World unit.

5.4.8 Toys R Us closed early 2018 and B&M Bargains opened in its place in September 2018. Poundworld recently closed and is currently vacant. The Mothercare unit was on the list of store closures announced in May 2018 but has to date not closed. Marstons Inns opened a restaurant, Spiral Weave, in late 2017. Premier Inn received planning permission in 2016 for a 60-bedroom hotel with restaurant adjacent to the retail park at John Smith Business Park, however development has yet to commence.

5.4.9 **Glenrothes-** the Kingdom Shopping Centre is the town's principal retail location. One of the centre's anchor shops, Dunnes Stores, closed in early 2018. Poundworld also closed due to the retailer entering administration. The Albany Gate area (former Co-op department store) demolition will lead to shop closures and relocation. Two store openings on Unicorn way were in late 2016 (CEX) and 2017 (The Little Thistle gift shop).

5.4.10 Achieved rents in the Kingdom Centre range between £10 and £22 per sq.ft.

5.4.11 In April 2018 work began on Easy Living Developments £10 million development on the site of the CISWO club on North Street. The Henge will be anchored by Marks & Spencer Simply Food with units also let to KFC, Tony Macaroni restaurants and Food Warehouse (by Iceland); only one unit remains available.

5.4.12 **Saltire Park-** The Pet Hut, and American Golf both opened here during summer 2018.

5.4.13 Retailer requirements for Glenrothes have ranged between 3 and 7 since 2012; the 4 current requirements are listed in Table 5.6.

5.4.14 **Leven-** Store openings include Cup Cake Coffee Box on High Street and vape shops Cloud Vapours (Durie Street) and Vaporized (High Street). Closures include WH Smith.

5.4.15 Achieved rents in Leven range between £7 and £24 per sq.ft.

5.4.16 The former DM Homecare hardware store on Mitchell Street was redeveloped into two modern units. One has been let to Domino's Pizza (trading) and the other to Vets 4 Pets. Planning permission was granted in July 2018 for the conversion of 31/35 High Street (former Cummings menswear store) into a family fitness centre.

5.4.17 **Riverside Retail Park-** a McDonalds drive thru restaurant is being developed opposite Sainsbury's on Riverside Road. In 2018 there are 3 named retail requirements for Leven (Table 5.6), including a potential store relocation for Lidl.

Table 5.6 Mid Fife retailer requirements, Winter 2018		
	Unit size requirements sq.m.	Location
Kirkcaldy		
Retail		
The Works	93 - 232	Ground floor
Deichmann	372 – 557	Town centre
HSL (Chair specialists)	186 – 372	Standalone, trade counter
Sub total retail	651 - 1,161	
Non-retail		
National Tyres & Autocare	232 - 464	Roadside
Snap Gyms	372 - 743	Franchise
Travelodge	no data	not specified
McDonalds	Min 334	Stand-alone restaurants with Drive-thru lane, Retail & leisure parks, Main arterial routes
Glenrothes		
Retail		
Deichmann	372 – 557	Town centre
Pets at Home	372 – 1,393	Retail parks, standalone units
Sub total retail	744 - 1,950	
Non-retail		
National Tyres & Autocare	232 - 464	Roadside
McDonalds Drive Thru	Min 334	Stand alone restaurants with Drive-thru lane, Retail & leisure parks, Main arterial routes.
Leven		
Retail		
Brighthouse	93 - 325	High Street or shopping centre
Lidl	not specified	Store relocation
Sub total retail	93 - 325	
Non-retail		
Marstons Inns		Site of 0.2 ha to 0.6 ha for development
Total Mid Fife retail requirements only	1,488 - 3,436	

Source: Ryden

5.5 East Fife- market activity and demand

5.5.1 **St Andrews-** new stores were opened by Brora cashmere and Oliver Bonas on Bell Street; Kartel on Church Street; Oliver Bonas; and The Junor Gallery, Amor, Boutique No 1, Chinchinchee and Vaporized on South Street.

5.5.2 Store closures have quickly been replaced, including The Ladybirds florist (now Brora), Continental Pantry (now Kartel), Iain Burnett Chocolatier (now Amor) and Thistle Dae gift shop (now Boutique No 1).

5.5.3 Rents in the prime areas of St Andrews are between £35 and £60 per sq.ft. Zone A.

5.5.4 New restaurant openings in St Andrews include Rouge and CombiniCo on South Street and Tanon on Market Street. Innes & Gunn Beer Kitchen, Drouthy Neebors and Prezzo restaurant all closed. Robertson Property recently submitted plans for a 90-bedroom hotel and 100-bed student accommodation at Abbey Park, if the development goes ahead it is expected to be operational by 2020.

5.5.5 St Andrews has the highest number of retailer requirements among Fife's towns,

currently standing at 9. The Works and Lidl are recent additions. (Table 5.7).

5.5.6 **Cupar-** New stores on Bonnygate include The Wee Pin Cushion, Hidden Sins, and Knockers Jugs & Chests. Courtyard Books relocated from Bonnygate to Lady Wynd.

5.5.7 Closures in the town include Funky Rascal childrens clothes shop at 32 Crossgate and Wee Prezzies on Bonnygate. Additionally, the hardware business R Dott Thomson on Bonnygate has recently been put up for sale.

5.5.8 In Cupar, retail rents are around £11- £20 per sq.ft.

5.5.9 London & Scottish Investments purchased a vacant site on South Road from Tesco (adjacent to a Tesco Extra store) in Cupar and have consent for a retail park

comprising 4,320 sq m gross floorspace. To date, units have been pre-let to Home Bargains and Costa Coffee. There is a current application for an alternative scheme for this site, involving 7 units (total 3,670 sq m gross)- see Table 6.11

5.5.10 In 2018 there are 4 requirements for Cupar (Table 5.7).

5.5.11 The next sections contain the analysis of retail expenditure and turnover, leading to the forecasts of spare retail expenditure to 2023 and 2028. Commentary is included on how the spare capacity relates to retail market demand.

Table 5.7
East Fife retailer requirements, Winter 2018

	Unit size requirements sq.m.	Location
Cupar		
Retail		
Briighthouse	93 - 325	High Street or shopping centre
Farmfoods	557 - 743	Busy main roads
Savers Health and Beauty	186 – 279	High street and shopping centre
Sub total retail	836 - 1,347	
Vets 4 Pets- Non-retail	139 -186	Standalone / roadside / retail park
St Andrews		
Retail		
Farmfoods	557 - 743	Busy main roads
Topps Tiles	279 – 743	Trade / retail park
British Red Cross	74 - 186	Strong retail pitch
Pets at Home	372 – 1393	Retail parks, standalone units
The Works	93 - 232	Ground floor
Lidl	1300 – 2460	prominent site in town, district, edge
Sub total retail	2,675 - 5,757	
Non-retail		
Papa Johns Pizza	79 - 93	Franchise. Local high streets, retail parades, neighbourhood centres
Vets 4 Pets	111 - 186	Arterial road / suburban locations
McDonalds Drive Thru	Min 334	Stand-alone restaurants with Drive-thru lane, Retail & leisure parks, Main arterial routes
Travelodge	-	120 bedrooms
Marstons Inns		Site of 0.2 ha to 0.6 ha for development
Total East Fife retail requirements only	3,511 - 7,104	

Source: Ryden

6 Convenience expenditure and turnover

6.1 Introduction

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

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

6.2 Convenience goods-definition

6.2.1 Convenience goods include:

- *Food and non- alcoholic drinks*
- *Alcoholic drinks*
- *Tobacco*
- *Non-durable household goods (90%); and*
- *Newspapers and magazines.*

6.2.2 This definition is provided in the *Experian Retail Planner Briefing Note 15, dated December 2017*, based on Central Government survey classifications.

6.3 Convenience expenditure potential

6.3.1 Table 6.1 shows the forecast convenience expenditure per capita data for each of the three retail catchment areas in Fife, based on data commissioned from Experian for this study. The forecast growth rate from 2018-28 is only 0.7% per annum (before deduction of SFT).

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

expenditure relates to conventional store floorspace, as shown in Table 6.1.

6.3.3 The proportion of SFT, or non-store sales, is forecast to increase up to 2028. It should be noted that the proportions of SFT shown in this table are mostly non-store sales and the proportions are low. Not included are internet related SFT sales with home delivery or click and collect for example, because the goods mainly come off existing supermarket shelves and that proportion is much larger but excluded here. The national proportions are applied in Table 6.1, based on data from Experian.

6.3.4 Forecasts of the total convenience expenditure potential of the residents of each catchment area are shown in Table 6.2, excluding SFT.

6.4 Convenience shopping patterns-market shares

6.4.1 In the 2016 NEMS household shopping interview survey, the respondents were asked where *they last visited for their main food shopping (Q1)*, and *the time before that (Q2)*. They were also asked where *they last visited for their top-up shopping (Q3)*. The findings were weighted and combined to provide estimates of all convenience shopping patterns relating to each of the catchment areas, as shown in Table 6.3.

6.4.2 Market shares refer to the proportions of expenditure from residents of a defined area which are spent in that area and in other areas. Table 6.3 shows the convenience market shares for each catchment area, based on the shopping patterns identified from the household survey.

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

Table 6.1 Fife convenience expenditure per capita per annum (in 2017 prices)				
Catchment areas	2016 £	2018 £	2023 £	2028 £
West Fife	2,413	2,398	2,404	2,415
Mid Fife	2,367	2,352	2,358	2,368
East Fife	2,706	2,689	2,695	2,708
<i>*excluding special forms of trading</i>				
West Fife		2,317	2,303	2,299
Mid Fife		2,272	2,259	2,255
East Fife		2,598	2,582	2,578
Note				
Original Experian figures for 2016 are in 2016 prices. These have been adjusted to 2017 prices by a factor of				1.02439
from <i>Experian Retail Planner Briefing Note 15, Appendix 4b- dated December 2017</i>				
The growth rates derive from the above Experian document, Appendix 4a.				
Growth rates		2016-18 0.9936	2018-23 1.0023	2023-28 1.0046
*An allowance for special forms of trading (SFT) is deducted so that the expenditure per capita relates to sales from conventional retail floorspace. The % deductions derive from <i>Experian Retail Planner Briefing Note 15, Appendix 3, Figure 5 - December 2017</i>				
Deductions for SFT		-3.4%	-4.2%	-4.8%

Table 6.2 Fife residents' convenience expenditure potential (in 2017 prices)					
<i>Excluding SFT (special forms of trading)</i>					
Catchment areas	2018 £ million	<i>growth</i> 2018-23 £ million	2023 £ million	<i>growth</i> 2023-28 £ million	2028 £ million
West Fife	298.9	1.9	300.8	2.8	303.6
Mid Fife	410.9	1.0	411.8	0.8	412.6
East Fife	161.7	1	162.4	1.0	163.4
Total Fife	871.5	3.6	875.1	4.6	879.6
Note					
From Tables 1.1 and 6.1. Figures are rounded.					

Table 6.3 Fife Council area residents- all convenience shopping patterns (Q1-Q3 combined) 2016 survey				
Catchment areas	Origin			
	West Fife	Mid Fife	East Fife	Total Fife
Destination				
West Fife	92%	8%	0%	35%
Mid Fife	4%	87%	10%	46%
East Fife	0%	3%	73%	13%
Outside Fife	5%	2%	17%	6%
Total	100%	100%	100%	100%
Source: NEMS household shopping interview survey 2016 for Fife Council				
The above data relates to the weighted survey data and filtered to remove don't knows, varies, internet and mail order				
Main food shopping (Q1&Q2) and top-up shopping (Q3) is weighted 80%:20% for the combination				

6.4.4 For Fife, 94% of convenience expenditure is retained in the Council area, leaving only 6% leakage. Graphs showing the most visited stores for main food shopping by

respondents to the survey are shown in Figure 6.1, reproduced from the Fife Retail Capacity Study 2016 for ease of reference.

6.5 Convenience expenditure and turnover by catchment area

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

6.5.2 Appendix 4 shows the estimates of expenditure inflows to each catchment area in detail, based on the household survey in Table 6.3 and visitor spending.

6.5.3 **Visitor spending-** in 2017, the Council commissioned a study entitled *The Economic Impact of Tourism in Fife & Districts* by Destination Research Consultants. This recent research reveals that visitor spending on shopping in Fife is far higher than in previous estimates in the 2016 and 2017 Retail Capacity Studies, based on STEAM reports. These were founded on historic economic models. The estimates of convenience and comparison shopping expenditure by visitors to Fife in 2018 are based on the updated research, and the details for convenience expenditure are presented in Appendix 4.

6.5.4 **Expenditure and turnover forecasts** - Tables 6.4 to 6.7 show the survey-based convenience expenditure and turnover relationships for each catchment area and for Fife in 2018, 2023 and 2028.

6.6 Convenience floorspace and turnover 2018

6.6.1 The current distribution of convenience floorspace in the three retail catchment areas is shown in Tables 6.8 to 6.10, based on the latest data provided by Goad (2018) and other sources, including Council data for most of the out of centre main supermarkets.

6.6.2 Average company turnover/ floorspace ratios from the Retail Rankings 2018 are applied to the main supermarkets and discount foodstores, with adjustments to include VAT and remove petrol/ non-retail sales, expressed in 2017 prices. These ratios also embrace recent research published by Mintel on the split of convenience and comparison floorspace among the various operators and the associated division of turnover.

6.6.3 Estimated average ratios are applied to all other shops. Those in the smaller towns are apportionments from the turnover ratios in the largest town centres in each catchment area. Tables 6.8 to 6.10 show the total average turnover in each sub area at average levels, based on this method.

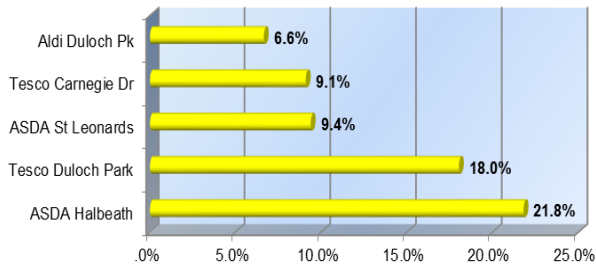
6.6.4 Comparison with the survey-based totals (actual turnover) is included for each area. This reveals slight over-trading in West Fife, moderate over-trading in Mid Fife and more significant trading at above average levels in East Fife.

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

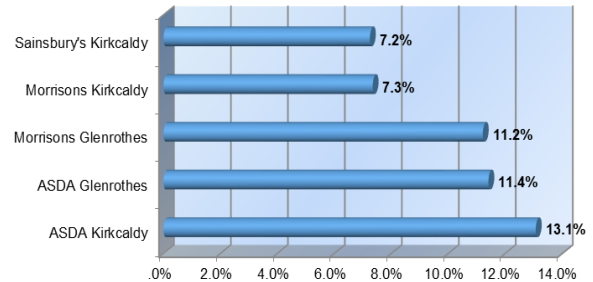
Figure 6.1 Main food shopping patterns- most frequently visited stores (household survey)

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

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



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



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

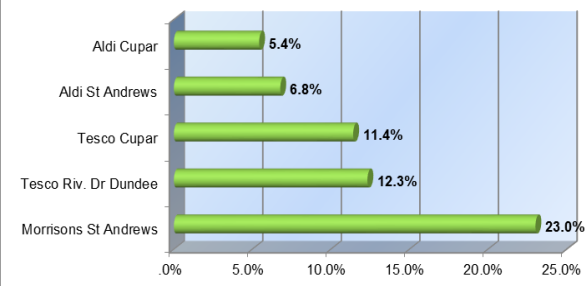


Table 6.4				
West Fife convenience expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		298.9	300.8	303.6
Add: inflows from rest of Fife	11%	32.6	32.8	33.1
inflows from outside Fife	4%	10.9	11.0	11.1
Less: outflows	-8%	-25.2	-25.4	-25.6
Retained expenditure (turnover)		317.3	319.3	322.3
Note				
Inflows and outflows from Appendix 4				

Table 6.5				
Mid Fife convenience expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		410.9	411.8	412.6
Add: inflows from rest of Fife	6%	26.7	26.7	26.8
inflows from outside Fife	3%	11.1	11.2	11.2
Less: outflows	-13%	-53.3	-53.4	-53.5
Retained expenditure (turnover)		395.4	396.4	397.1
Note				
Inflows and outflows from Appendix 4				

Table 6.6				
East Fife convenience expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		161.7	162.4	163.4
Add: inflows from rest of Fife	7%	11.3	11.4	11.4
inflows from outside Fife	16%	25.7	25.9	26.0
Less: outflows	-27%	-43.9	-44.0	-44.3
Retained expenditure (turnover)		154.9	155.5	156.5
Note				
Inflows and outflows from Appendix 4				

Table 6.7				
Fife convenience expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Council area residents' expenditure potential		871.5	875.1	879.6
Add:				
inflows from outside Fife	5%	47.8	48.0	48.2
Less: outflows	-6%	-48.3	-48.5	-48.7
Retained expenditure (turnover)		867.6	871.2	875.9
Note				
Inflows and outflows from Appendix 4				

Table 6.8				
West Fife: convenience floorspace and turnover, 2018 (in 2017 prices)				
	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
Dunfermline Town Centre				
*Marks & Spencer (2,120 sqm gross)-30% conv	636	413	10,145	4.2
*Rest of Town Centre	3,080	2,002	5,720	11.5
Sub total	3,716	2,415		15.6
*Tesco, Winterthur Lane (total 8,000 sq m gross-est 70% conv)	5,600	3,360	10,765	36.2
*ASDA Halbeath (total 9,540 goad + 1,162 mez) sq m gross- est 55% conv	5,886	3,532	13,710	48.4
ASDA St Leonards-total 4,749 sqm (75% conv)	3,562	2,137	13,710	29.3
Tesco Duloch-total 6,147 sq m (82% conv)+ ext 2,747 (22%conv)	5,645	3,387	10,765	36.5
Aldi Duloch (1606 sqm gross-est 80% conv)	1,285	964	11,934	11.5
Dobbies Garden Centre- Farm food hall (estimate)	400	360	8,030	2.9
Tesco Express, Aberdour Rd	326	245	16,132	3.9
Aldi Halbeath Rd (total 1,420 sq m gross- est 85% conv)	1,207	905	11,934	10.8
Iceland, Halbeath Rd	800	560	7,622	4.3
*Farmfoods, Carnegie Retail Park	750	525	6,248	3.3
*Home Bargains (1,010 sq gross- 25% conv)	253	202	8,488	1.7
Other Dunfermline shops	3,009	1,956	3,718	7.3
Co-op, Linburn Rd, Dunfermline	319	191	8,426	1.6
Rosyth	1,322	859	3,718	3.2
Tesco, Rosyth	1,609	965	10,765	10.4
Sainsbury's Local, Camdean, Rosyth	350	263	15,391	4.0
*Inverkeithing	1,170	761	3,718	2.8
Crossgates	566	368	3,718	1.4
*Kincardine	540	351	3,718	1.3
*Tesco Metro, Dalgety Bay	1,840	1,288	10,765	13.9
*Rest of Dalgety Bay	160	104	3,718	0.4
ASDA Dalgety Bay (3,437 sq m gross 80% conv)	2,750	1,650	13,710	22.6
Oakley, Saline, Torryburn, H Valleyfield, Crossford, Comrie, Cairneyhill, Charleston, Inverkeithing Mini Market 120sqm, plus few others	1,838	1,195	3,718	4.4
Sub total	41,185	26,126		262.1
Cowdenbeath Town Centre				
*Morrisons	2,110	1,055	11,042	11.6
*Rest of Town Centre	2,450	1,593	4,004	6.4
Sub total	4,560	2,648		18.0
Aldi, Stenhouse St, Cowdenbeath (1,587 gross-est 80% conv)	1,270	952	11,934	11.4
*Kelty	390	254	3,718	0.9
Total West Fife turnover at average levels				308.0
<i>Over- trading above average levels</i>	3%			9.2
Total West Fife	51,120	32,394		317.3
Note				
* Goad gross floorspace data 2018, provided by the Council				
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2017 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 30% for 2018, to allow for the general decline in shop numbers over the period. Average supermarket turnover ratios based on the Retail Ranking 2018 and other Mintel research on supermarket operator floorspace, adjusted to remove petrol sales, plus an allowance for VAT added- in 2017 prices.				
Cowdenbeath TC turnover/ floorspace ratio (excluding Morrisons) assumed at 70% of Dunfermline TC turnover ratio.				
Other small towns at 65% of Dunfermline TC turnover ratio				

Table 6.9 Mid Fife: convenience floorspace and turnover, 2018 (in 2017 prices)				
	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
Kirkcaldy Town Centre				
*Lidl (1,380 gross-85%conv)	1,173	880	9,419	8.3
*Marks & Spencer (total 2,830 sq m gross) 30% conv	849	552	10,145	5.6
*Rest of Town Centre	3,650	2,373	5,720	13.6
Sub total	5,672	3,804		27.5
Morrisons, Inveriel				
6,369 sq m gross, 3,519 sq m net-2,815 sq m conv (80%)	5,095	2,815	11,042	31.1
ASDA, Kirkcaldy	7,133	3,846	13,710	52.7
11,889 sq m gross (Council)- 6,410 sq m net at 60:40 conv/ comp sales				
*Sainsbury's, Fife Central Retail Park (5,610 sq m gross- 85% conv)	4,769	2,861	11,470	32.8
*M&S Simply Food, Fife Central RP	1,020	714	10,145	7.2
Greggs, Central Retail Park	200			
Aldi, McKenzie St, Kirkcaldy (1,493 sq m gross total)- 80% conv	1,194	896	11,934	10.7
Aldi, Ferrard Rd, Kirkcaldy				
(Total 1606 sq m gross/ 1,125 net- est 80% conv)	1,285	844	11,934	10.1
Other Kirkcaldy shops	4,319	2,807	3,718	10.4
Dysart	309	201	3,718	0.7
Coaltown of Wemyss	37	24	3,718	0.1
Ballingry	738	480	3,718	1.8
*Lochgelly	1,960	1,274	3,718	4.7
Lochore	467	303	3,718	1.1
Cardenden	1,772	1,152	3,718	4.3
*Burntisland	1,480	962	3,718	3.6
Kinghorn & Aberdour	664	431	3,718	1.6
Sub total	32,441	19,610		173.0
Glenrothes Town Centre				
*Sub total-Town Centre shops	3,130	2,035	5,720	11.6
*Morrisons, Flemington Rd, Glenrothes (4,850 sq m gross-80% conv)	3,880	1,940	11,042	21.4
Lidl, Leslie Rd, Glenrothes (1,000 sq m gross-90%conv)	900	675	9,419	6.4
*Aldi, Flemington Rd, Glenrothes (1,300 sq m gross- est 85% conv)	1,105	829	11,934	9.9
*B&M, Flemington Rd, Glenrothes (1,500 sq m gross- 25% conv)	375	300	3,977	1.2
ASDA, Fullerton Rd, Glenrothes				
(Total 7,897 sq m gross- 4,343 sq m gross conv)	4,343	2,606	13,710	35.7
*Cadham Centre, Glenrothes	790	514	3,718	1.9
Iceland, Glenwood, Glenrothes	717	502	7,622	3.8
*Other Glenwood shops, Glenrothes	750	488	3,718	1.8
Tesco Express, Sth Park Rd, Glenrothes	410	308	16,132	5.0
Other Glenrothes shops (notional estimate)	2,500	1,625	3,718	6.0
Leslie	585	380	3,718	1.4
Markinch	535	348	3,718	1.3
Kinglassie & Thornton	655	425	3,718	1.6
Falkland & Freuchie	410	267	3,718	1.0
Ladybank & Kettlebridge	355	231	3,718	0.9
Sub total	18,309	11,435		99.3
Leven Town Centre				
*Sub total-Town Centre shops (excluding Riverside Retail Park)	2,180	1,417	4,004	5.7
*Sainsbury's, Riverside RP	2,700	1,620	11,470	18.6
*B&M, Riverside RP (1,530 sq m gross- 25% conv)	383	306	3,977	1.2
*Home Bargains, Riverside Rd (2060 sq m gross- 25% conv)	515	412	8,488	3.5
*Lidl, Mitchell St, Leven (1,060 sq m gross-90% conv)	954	716	9,419	6.7
Aldi, Turpie Rd, Leven-1,480sqm gross, 990 sq m net- 80% conv	1,184	743	11,934	8.9
Sub total	5,736	3,796		38.9
East Wemyss	277	180	3,718	0.7
Methil/ Methilhill	2,328	1,513	3,718	5.6
Buckhaven	1,215	790	3,718	2.9
Kennoway & Windygates & Upper Largo	776	504	3,718	1.9
Lundin Links & Lower Largo	329	214	3,718	0.8
Newburgh & Strathmiglo & Auchtermuchty	662	430	3,718	1.6
Sub total	5,586	3,631		13.5
Total Mid Fife turnover at average levels				369.5
Over- trading above average levels	7%			26.0
Total Mid Fife	73,054	45,728		395.4
Note				
* Goad gross floorspace data 2018, provided by the Council				
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2017 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 30% for 2018, to allow for the general decline in shop numbers over the period. Average supermarket turnover ratios based on the Retail Ranking 2018 and other Mintel research on supermarket operator floorspace, adjusted to remove petrol sales, plus an allowance for VAT added- in 2017 prices.				
Glenrothes TC turnover/ floorspace ratio assumed same as Kirkcaldy TC turnover ratio. Leven TC turnover ratio assumed at 70% of Kirkcaldy TC turnover ratio.				
Other small towns at 65% of Kirkcaldy TC turnover ratio.				

Table 6.10 East Fife: convenience floorspace and turnover, 2018 (in 2017 prices)				
	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
St Andrews Town Centre				
*Tesco Metro	1,560	1,092	10,765	11.8
*Sainsbury's Local	580	435	15,391	6.7
*Rest of Town Centre	3,000	1,950	4,920	9.6
Sub total	5,140	3,477		28.0
Morrisons, St Andrews	3,740	1,870	11,042	20.6
Aldi, Tom Stewart Lane, St Andrews (1,331 sq m gross-80% conv)	1,065	799	11,934	9.5
M&S Simply Food, Largo Rd	1,395	977	10,145	9.9
Other St Andrews shops	424	276	3,936	1.1
Balmullo, Guardbridge, Kingsbarns, Leuchars, S'kinness	987	642	3,936	2.5
Sub total	7,611	4,563		43.7
Cupar Town Centre				
*Co-op	1,200	780	8,426	6.6
*Lidl (total 2,000 sq m gross) 80% conv	1,600	1,200	9,419	11.3
*Rest of Town Centre	2,270	1,476	4,428	6.5
Sub total	5,070	3,456		24.4
Tesco, Cupar (total 2,033 sq m gross/ 1,338 net-c70% conv- agent data)	1,423	937	10,765	10.1
Aldi, South Rd, Cupar (total 1,587 sq m gross- 80% conv)	1,270	952	11,934	11.4
Ceres & Dairsie	396	258	3,936	1.0
*Anstruther	510	332	3,936	1.3
Cellardyke & Crail & St Monans & Pittenweem	883	574	3,936	2.3
Elie & Colinsburgh	284	184	3,936	0.7
Tayport/Wormit & Newport	1,066	693	3,936	2.7
Sub total	5,832	3,929		29.5
Total East Fife turnover at average levels				125.6
Over-trading above average levels	23%			29.3
Total East Fife	23,653	15,424		154.9
Note				
* Goad gross floorspace data 2018, provided by the Council				
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2017 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 30% for 2018, to allow for the general decline in shop numbers over the period. Average supermarket turnover ratios based on the Retail Ranking 2018 and other Mintel research on supermarket operator floorspace, adjusted to remove petrol sales, plus an allowance for VAT added- in 2017 prices.				
Cupar TC turnover/ floorspace ratio assumed at 90% of St Andrews TC turnover ratio. Other small towns assumed at 80% of St Andrews TC turnover ratio.				

6.7 Online food shopping

6.7.1 Among those who bought their groceries on the internet in Fife, the household survey indicates that, for main food shopping (Q1&Q2), 40% used Tesco, 18% used ASDA, and 11% used Sainsbury's.

6.8 Convenience planning consents & opportunities

6.8.1 Table 6.11 shows the current convenience retail planning consents and opportunities in Fife, which include a number of proposed discount foodstores and two proposed M&S Simply Food stores plus neighbourhood stores and others. These commitments require to be deducted from forecasts of spare capacity.

6.8.2 Planning consent for a neighbourhood supermarket at South Fod in Dunfermline East is highly unlikely to proceed. Therefore, the site is not included in this Study. Nor has the consent for a new Tesco supermarket at South Road, Cupar, been included, because there is a more recent consent for an alternative retail development. Exclusion of the Tesco consent from this analysis does not affect the status of the consent, but recognises that it is highly unlikely to be implemented.

6.8.3 There is a planning consent which includes convenience floorspace at South Road, Cupar, together with an alternative scheme on the site which is an application under consideration- see Table 6.11. There is also an opportunity for additional convenience floorspace at St Andrews to serve future

Table 6.11 Proposed convenience floorspace in Fife: consents and applications 2018 (in 2017 prices)				
	Floorspace sq m		Turnover ratio £/sq m	Turnover £million
	gross	net		
Planning consents included in the capacity study				
Aldi, Donibristle, Dalgety Bay 15/03782PPP & 16/02676 & 16/02388 (1,650 sq m gross, 1,125 sq m net-est 80% conv)	1,320	900	11,934	10.7
Yard Public House site, Admiralty Rd, Rosyth 17/01554/FULL Proposed Lidl supermarket- (total 2,367sq m gross. Conv 2,012 sq m and 355 sq m comp.	2,012	1,220	9,419	11.5
North End Park, Cowdenbeath 15/04183/FULL & 15/04183/NM/2-Sept 2018 Unit 1 Discount foodstore (Lidl) 1,794 sq m gross, 1,066 sq m net- est 85% conv. Unit 2 budget mixed goods retailer (B&M) 1,858 sq gross,1,674 sq m net- 25% conv	1,525 465	906 419	9,419 3,977	8.5 1.7
Halbeath Retail Park- extension 16/01927/FULL- subject to S75 agreement Units 9 & 11- 4,532 sq m gross convenience floorspace - for: M&S Simply Food Lidl- (2,488 sqm gross total-80% conv) Other proposed units are for bulky goods (5,435 sq m gross)	2,044 1,990	1,431 1,294	10,145 9,419	14.5 12.2
Inglis St, Dunfermline 17/01812/FULL- demolition of tile warehouse and devt. of 3 retail units. Total 1,289 sq m gross. Assume 432 sq m for conv. Other 2 units for comparison (432 sq m and 425 sq m)	432	324	8,500	2.8
Freescale site (Shepherd Offshore), Dunfermline -16/03359/ARC Class 1 retail (supermarket) -2,500 sq m gross within masterplan for the site- latest version of previous proposals. Estimate 85% conv.	2,125	1,275	8,500	10.8
Former Stagecoach Depot, Kirkcaldy-16/02147/FULL & 16/02147/NM/1 Lidl relocation from Esplanade- 2,174 sq m gross, 1,327 sq m net Proposed convenience floorspace (85%): 1,848 sq m gross, 1,128 sq m net Existing store: 1,286 sq m gross, 996 sq m net Existing convenience floorspace: 1,093 sq m gross, 847sq m net Net difference	755	281	9,419	2.6
Kingslaw Village/ Burnside Neighbourhood Centres 10/01774/EIA Kirkcaldy-Two supermarkets- 1,500 sq m gross and 370 sq m gross	1,870	1,122	8,500	9.5
Queensgate, Glenrothes (Tullis Russell) 15/02702/PPP Retail warehousing with mezzanines. Floorspace- total 8,454 sq m gross, with consent for up to 1,300 sq m net convenience space within the total. Assume 80% net/ gross	1,625	1,300	8,500	11.1
CISWO site, North St, Glenrothes 15/03140/PPP & 16/02458/ARC 5 units:Class 1 retail and other commercial use options Unit 1 (probably for M&S Simply Food) Units 2&3- total 836 sq m & Unit 4 at 445 sq m- could be retail or other Use Classes	1,021	715	10,145	7.3
South Road, Cupar 15/04188/FULL Floorspace from PPC Supporting Statement Update March 2017- Table 1 Total 4,320 sq m gross, 3,387 sq m net (includes 125 sq m net non-retail) Net comp floorspace- 2,202 sq m (applicants' figure) Net conv floorspace- 1,059 sq m (applicants' figure)		1,059	8,500	9.0
Current applications: not included in the capacity study				
South Road, Cupar 18/00978/FULL (Alternative to current consent) Floorspace from PPC Supporting Statement Update July 2018- Table 1 A Total 7 units: 3,670 sq m gross, 3,353 sq m net Convenience (1,427 sq m net), comparison (1,655 sq m net), Class 3/ t'away (272 sq m net)				
Craigtoun- St Andrews West SDA Proposed expansion of St Andrews. It includes provision for 2,000 sq m gross of retailing. No type specified yet. Potential for a 1,200 sq m supermarket with possibly 800 sq m comparison floorspace				
Note Gross floorspace from the Council. Estimated turnover of the consents are based on company averages from the 2018 Retail Rankings, where the retailer is named. For other consents, a nominal turnover ratio has been applied. Very minor retail consents have not been included. Estimated turnover of the current applications is not shown here because the applications are yet to be determined, with the details agreed under individual assessments.				

expansion of the town. The current application in Cupar and the St Andrews opportunity have not been determined by the Council, so are not assumed as deductions from capacity.

7 Convenience expenditure capacity

7.1 Introduction

7.1.1 This section provides estimates of the spare convenience retail expenditure capacity that could service new retail floorspace in each of the three retail catchment areas. The forecasts of spare capacity are for the periods 2018-23, 2023-28 and for the total ten-year period 2018-28, after allowing for the existing planning commitments.

7.2 Definition

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

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

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

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

7.2.4 The forecasts of spare convenience expenditure capacity in this report

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

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

7.3 Spare convenience expenditure capacity

7.3.1 **Low estimates-** Tables 7.1 to 7.3 show the forecast spare convenience expenditure for each of the three retail catchment areas.

7.3.2 Assuming the current consents shown in Table 6.11 are developed, there is predicted substantial negative spare expenditure capacity in West Fife and slightly negative spare expenditure capacity in Mid Fife over the next ten years. There is a significant predicted level of surplus expenditure capacity in East Fife, which is partly associated with higher levels of visitor spending from recent research referred-to in the previous section.

7.3.3 **High estimates-** For estimates at the high end of the range to apply, there would have to be potential to accommodate a supermarket which would can reduce leakage and attract some new trade. In today's retail market, this is more likely to include a discount foodstore, sometimes in combination with another type of store, but there would probably be little attraction of new trade.

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

7.3.5 The resulting levels of recaptured leakage are either small (West and Mid Fife) or modest, as in East Fife. The choice of this approach avoids overlap where reduced

leakage in one catchment may mean increased trade loss in another. It is also consistent with the probability that the formats of the current retail consents would probably not capture significant levels of leakage from beyond the retail catchment area in Fife in which they are located.

7.3.6 Under the high estimates, there is still significant forecast negative spare capacity in West Fife and a small amount of surplus spare capacity in Mid Fife, but more surplus capacity in East Fife.

7.3.7 In terms of supporting the current convenience retailer requirements in Tables 5.5 to 5.7, the forecast spare capacity has mixed consequences. In West Fife, the negative capacity is high, but the consent at Halbeath allows for a Lidl store, so there is no new issue arising as a planning matter. In Mid Fife, the Lidl requirement in Leven is for a relocation, so the low level of forecast convenience capacity would not be a material issue. In East Fife, the retailer requirements (Lidl and Farmfoods) could be supported by the forecast spare capacity.

7.3.8 Finally, the assessment of future new retail development applications will be subject to the policy provisions of the sequential test and network of centres, where impacts of new developments must not threaten the vitality and viability of town centres and other centres in the network.

Table 7.1			
West Fife: forecast spare convenience expenditure capacity (in 2017 prices)			
	2018-23	2023-28	2018-28
	£million	£million	£million
(a) Current over-trading (Table 6.8)	9.2		9.2
(b) Growth in retained expenditure (turnover)- Table 6.4	2.0	3.0	5.0
(c) Less planning commitments: (selected consents- Table 6.11)	-72.7		-72.7
Low estimate (a+b-c)	-61.5	3.0	-58.5
(d) Add: potential to reduce outflow	2023	2028	
Outflow £million- Table 6.4	-25.4	-25.6	
Outflows to centres outside Fife-Tables 6.3 & 6.4	-13.8	-13.9	
Potential to clawback up to 50% of leakage to centres outside Fife	6.9	0.06	7.0
(e) Add: potential to increase inflow- Table 6.4			
Assume negligible			
High estimate (a+b-c+d+e)	-54.5	3.0	-51.5
Equivalent convenience floorspace	£ per sq m	£ per sq m	
* Turnover/ floorspace ratio	11,438	11,499	
	sq m net	sq m net	sq m net
Low	-5,400	300	-5,100
High	-4,800	300	-4,500
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
* The turnover ratio derives from the 2018 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons, ASDA, Aldi and Lidl, at £11,390 per sq m. The ratio is adjusted to relate to 2023 and 2028, based on % turnover growth in Fife -Table 6.7			

Table 7.2			
Mid Fife: forecast spare convenience expenditure capacity (in 2017 prices)			
	2018-23	2023-28	2018-28
	£million	£million	£million
(a) Current over-trading (Table 6.9)	26.0		26.0
(b) Growth in retained expenditure (turnover)- Table 6.5	0.9	0.7	1.7
(c) Less planning commitments: (selected consents- Table 6.11)	-30.5		-30.5
Low estimate (a+b-c)	-3.6	0.7	-2.8
(d) Add: potential to reduce outflow	2023	2028	
Outflow £million- Table 6.5	-53.4	-53.5	
Outflows to centres outside Fife-Tables 6.3 & 6.5	-10.2	-10.2	
Potential to clawback up to 50% of leakage to centres outside Fife	5.1	0.0	5.1
(e) Add: potential to increase inflow- Table 6.5			
Assume negligible			
High estimate (a+b-c+d+e)	1.5	0.8	2.3
Equivalent convenience floorspace	£ per sq m	£ per sq m	
* Turnover/ floorspace ratio	11,438	11,499	
	sq m net	sq m net	sq m net
Low	-300	100	-200
High	100	100	200
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
* The turnover ratio derives from the 2018 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons, ASDA, Aldi and Lidl, at £11,390 per sq m. The ratio is adjusted to relate to 2023 and 2028, based on % turnover growth in Fife -Table 6.7			

Table 7.3			
East Fife: forecast spare convenience expenditure capacity (in 2017 prices)			
	2018-23 £million	2023-28 £million	2018-28 £million
(a) Current over-trading (Table 6.10)	29.3		29.3
(b) Growth in retained expenditure (turnover)- Table 6.6	0.6	1.0	1.6
(c) Less planning commitments: Table 6.11	-9.0		-9.0
Low estimate (a+b-c)	20.9	1.0	21.9
(d) Add: potential to reduce outflow			
2023			
2028			
Outflow £million- Table 6.6	-44.0		-44.3
Outflows to centres outside Fife-Tables 6.3 & 6.6	-27.9		-28.1
Potential to clawback up to 50% of leakage to centres outside Fife	13.9	0.09	14.0
(e) Add: potential to increase inflow- Table 6.6			
Assume negligible			
High estimate (a+b-c+d+e)	34.9	1.1	35.9
Equivalent convenience floorspace	£ per sq m	£ per sq m	
* Turnover/ floorspace ratio	11,438	11,499	
	sq m net	sq m net	sq m net
Low	2,000	100	2,100
High	3,000	100	3,100
<p>Note</p> <p>Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i></p> <p>* The turnover ratio derives from the 2018 Retail Rankings for the average of Sainsbury's, Tesco, Morrisons, ASDA, Aldi and Lidl, at £11,390 per sq m. The ratio is adjusted to relate to 2023 and 2028, based on % turnover growth in Fife -Table 6.7</p>			

8 Comparison expenditure and turnover

8.1 Introduction

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

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

8.2 Comparison goods-definition

8.2.1 Comparison goods include:

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

8.2.2 This definition reflects that in the *Experian Retail Planner Briefing Note 15, dated December 2017*, based on Central Government survey classifications.

8.2.3 '*Bulky goods*' is a collective sub category of comparison goods. These include at least furniture/ floorcoverings and household textiles, large domestic appliances and DIY/hardware. Definitions by retail research agencies vary. There is no precise way of comprehensively identifying all bulky goods retail floorspace in any study area. While bulky goods are normally found in retail parks, they are also important to many town centres.

8.2.4 For these reasons, separate forecasts of capacity for bulky goods were

discontinued in the Fife Retail Capacity series. The main benefit of the category is to assist development management to identify restrictions on the range of goods to be sold on retail parks.

8.3 Comparison expenditure potential and the internet

8.3.1 Table 8.1 shows the forecast comparison expenditure per capita data for each of the three retail catchment areas in Fife, based on data commissioned from Experian for this study. The forecast growth rate from 2018-28 is 3.1% per annum (before deduction of SFT), which is substantially higher than the forecast growth rate for convenience expenditure.

8.3.2 As explained in section 6, special forms of trading (SFT), which is almost entirely internet shopping, but includes a very small proportion of mail order, are removed from the expenditure per capita data, so that it relates to conventional shop floorspace. The proportion of SFT, or mainly non-store sales, is forecast to increase up to 2028.

8.3.3 For comparison expenditure, it should be noted that the proportions of SFT based on the household survey findings on internet shopping by Fife residents (28.9%) are much higher than the national average (15.4% in 2018) estimated by Experian, as shown in Table 8.1. Similar differences emerge in recent household shopping surveys in other local authority areas. Explanation of how the survey findings on the proportions of SFT are compiled is provided in Appendix 6 of the Fife Retail Capacity Study 2016.

8.3.4 Pitney Bowes also provide estimates and forecasts of the proportions of the proportion of SFT, which appear much closer to the survey- based findings for Fife. In fact, a reduction to the survey proportion of 28.9% needs to be made to allow for the overlap between non-store-based sales and store related internet sales. Application of the Pitney Bowes estimates (24.8% in 2018) effectively addresses this issue.

Table 8.1				
Fife comparison expenditure per capita per annum (in 2017 prices)				
Catchment areas	2016 £	2018 £	2023 £	2028 £
West Fife	3,347	3,454	4,007	4,676
Mid Fife	2,965	3,060	3,549	4,142
East Fife	3,964	4,091	4,745	5,538
<i>*excluding special forms of trading</i>				
West Fife		2,597	2,805	3,133
Mid Fife		2,301	2,484	2,775
East Fife		3,076	3,322	3,710
Note				
Original Experian figures for 2016 are in 2016 prices. These have been adjusted to 2017 prices by a factor of 1.01220 from <i>Experian Retail Planner Briefing Note 15, Appendix 4b- dated December 2017</i>				
The growth rates derive from the above Experian document, Appendix 4a.				
		2016-18	2018-23	2023-28
Growth rates		1.0320	1.1599	1.1671
*An allowance for special forms of trading (SFT) is deducted so that the expenditure per capita relates to sales from conventional retail floorspace.				
Experian publish their own estimates of the % deduction for SFT for the UK in their <i>Retail Planner Briefing Note 15, Figure 5 - December 2017</i> .				
Experian deductions for SFT		-15.4%	-17.4%	-17.6%
The above estimated proportions are low compared to the Fife survey findings. For this study, the survey-based proportion was 28.9% in 2016.				
Pitney Bowes has also published estimates of the proportions of SFT in their Retail Expenditure Guide 2018/19 published September 2018:				
Pitney Bowes deductions for SFT- applied in this report:		-24.8%	-30.0%	-33.0%
Note that there is some overlap between non-store sales and store-related internet sales, so the proportions will be a bit lower than indicated from the household survey. In fact the proportion is unknown. Experian guess at a 25% reduction, whereas Pitney Bowes simply acknowledge the issue.				
For the purposes of this study, it is considered that the survey-based proportions of SFT provide a readier interpretation of the relationship of expenditure to future comparison retail floorspace requirements for planning purposes in Fife. Application of the Pitney Bowes forecasts provides a reduction from the survey proportion (28.9%) to allow for the overlap between non-store based sales and store-related internet sales.				

Table 8.2					
Fife residents' comparison expenditure potential (in 2017 prices)					
<i>Excluding SFT (special forms of trading)</i>					
Catchment areas	2018 £ million	<i>growth</i> 2018-23 £ million	2023 £ million	<i>growth</i> 2023-28 £ million	2028 £ million
West Fife	335.2	31.3	366.4	47.4	413.8
Mid Fife	416.1	37.0	453.0	54.8	507.9
East Fife	191.5	17.4	208.9	26.3	235.2
Total Fife	942.7	85.6	1,028.3	128.6	1,156.9
Note					
From Tables 1.1 and 8.1. Figures are rounded.					

8.3.5 Therefore, we have applied the Pitney Bowes' forecasts of the proportions of SFT in Table 8.1, as explained in the footnote to that table.

8.3.6 If the Experian estimates of SFT were applied, the resulting turnover levels in the catchment areas would be unrealistic, with very high turnover/floorspace ratios. Also there would be excessively high levels of spare comparison expenditure capacity in relation to retail development market conditions.

8.3.7 The survey-based proportions of SFT are not surprising, as internet retail spending is now very high compared to the past. When the respondents to the household survey were asked how often they used the internet for non-food shopping, 48% said 'very/ quite frequently' and a further 27% said 'occasionally'.

8.3.8 Forecasts of the total comparison expenditure potential of the residents of each retail catchment area are shown in Table 8.2.

The growth rate to 2028 is the result of combining projected population growth with the forecast growth in expenditure per capita.

8.4 Comparison shopping patterns- market shares

8.4.1 Information on comparison shopping patterns by residents of the three catchment areas was collected by the household survey. The method is the same as for convenience shopping.

8.4.2 The list of questions is provided in Appendix 2. For each of the five categories of comparison goods in the questionnaire, the respondents were asked to identify where *they visited most often* to buy these goods (Q7-Q11). Respondents could identify up to two destinations (or internet) for each category

8.4.3 The results were weighted and combined to reveal the shopping patterns for all comparison goods based on the household survey, as shown in Table 8.3, with the

supporting information in Appendix 7 of the Fife Retail Capacity Study 2016.

8.4.4 Note that the proportions in Table 8.3 exclude SFT (internet/ mail order), to show physical destinations only and to achieve compatibility with the expenditure per capita data, which excludes SFT. Thus, Table 8.3 highlights the shopping patterns between the three catchment areas and with centres outside Fife.

8.4.5 Table 8.3 indicates that the main destinations for comparison shopping in West and Mid Fife are the towns and retail parks within these catchment areas. In East Fife, most comparison shopping by residents is done outside Fife (mainly in Dundee) and also in Mid Fife.

8.4.6 More detail on the most frequently visited stores and centres is provided by the graphs in Figure 8.1, reproduced from the Fife Retail Capacity Study 2016, for ease of reference.

Table 8.3 Fife Council area residents- all comparison shopping patterns (Q7-Q11 combined) 2016 (from household survey alone)				
Catchment areas	Origin			
	West Fife	Mid Fife	East Fife	Fife Total
Destination				
West Fife	67%	10%	1%	28%
Mid Fife	7%	65%	10%	33%
East Fife	0%	1%	30%	7%
Outside study area	26%	24%	58%	32%
Total	100%	100%	100%	100%
Note The above data relates to the weighted survey data and filtered to remove don't know s, varies, internet and mail order				

8.5 Comparison expenditure and turnover by catchment area

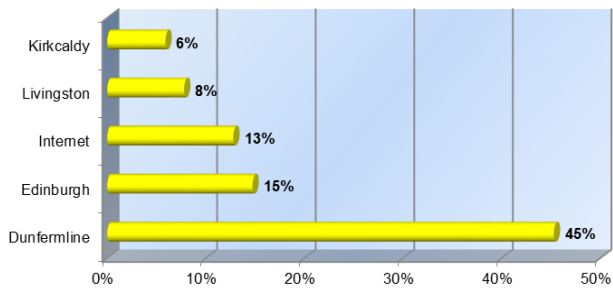
8.5.1 Like the analysis in section 6, the relationship between total expenditure and turnover in each catchment area is defined simply as: residents' expenditure potential plus inflows, less outflows equals total turnover.

8.5.2 Appendix 5 shows the estimates of expenditure inflows to each catchment area in detail, based on the household survey (Table 8.3) and visitor spending. The updated research on visitor spending in Fife is explained under sub section 6.5, i.e. it is far higher than in previous estimates.

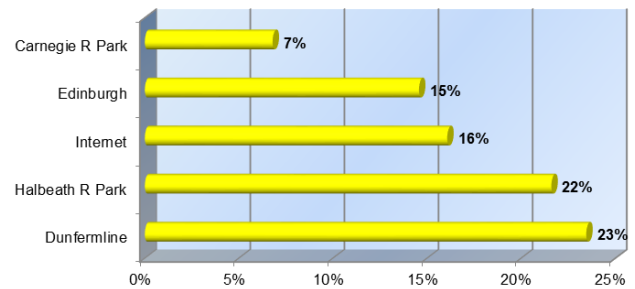
Figure 8.1 Comparison shopping- most frequently visited destinations (including internet): NEMS household survey 2016

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

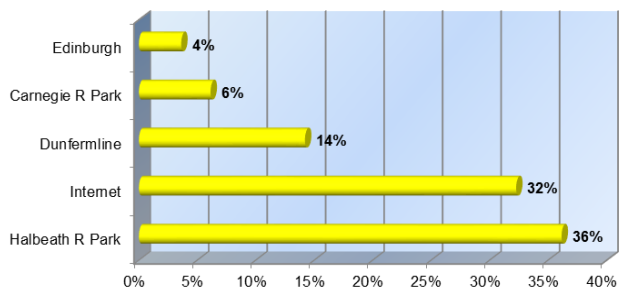
West Fife: most frequently visited stores/ centres for clothes, shoes and other fashion items by residents



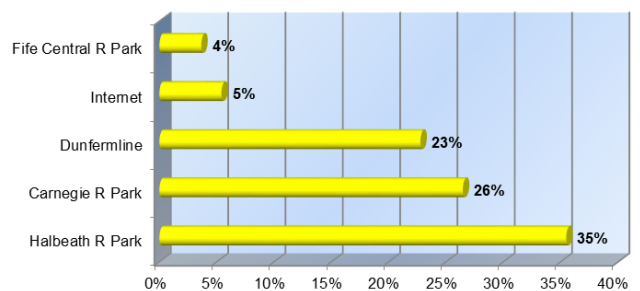
West Fife: most frequently visited stores/ centres for furniture, floorcoverings and soft furnishings by residents



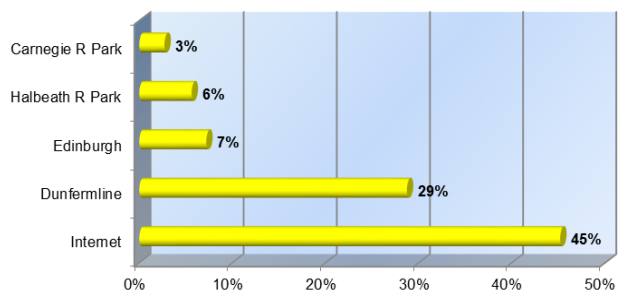
West Fife: most frequently visited stores/ centres for large domestic appliances by residents



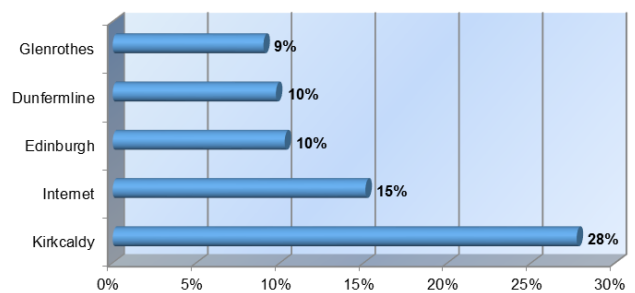
West Fife: most frequently visited stores/ centres for DIY and hardware by residents



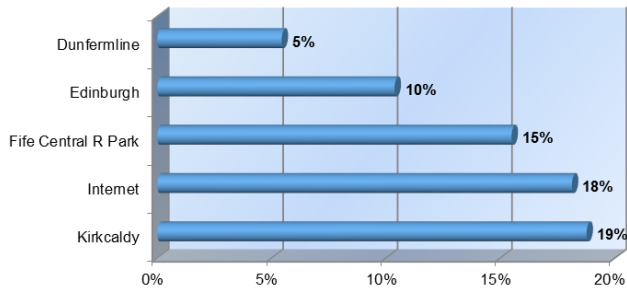
West Fife: most frequently visited stores/ centres for mainly personal goods by residents



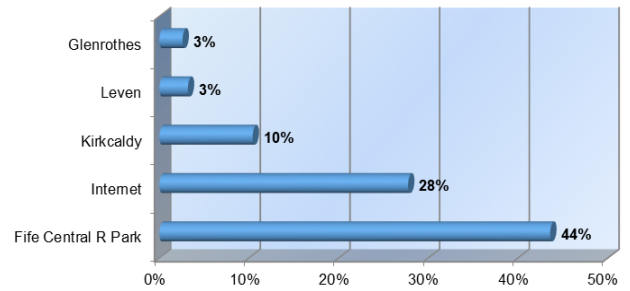
Mid Fife: most frequently visited stores/ centres for clothes, shoes and other fashion items by residents



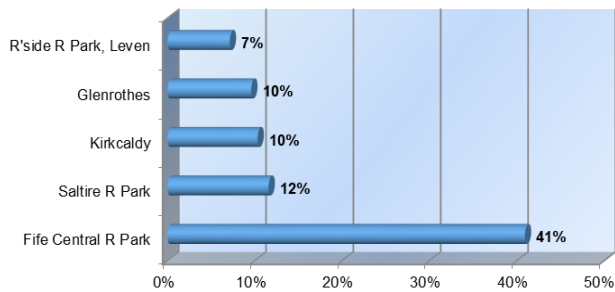
Mid Fife: most frequently visited stores/ centres for furniture, floorcoverings and soft furnishings by residents



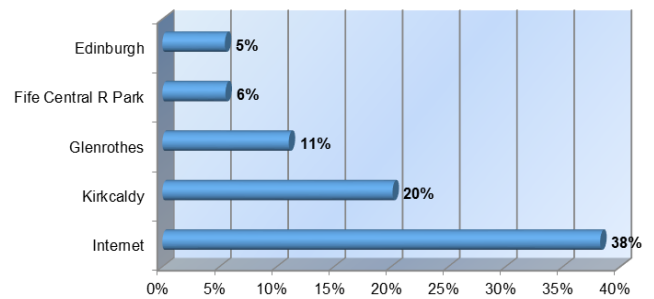
Mid Fife: most frequently visited stores/ centres for large domestic appliances by residents



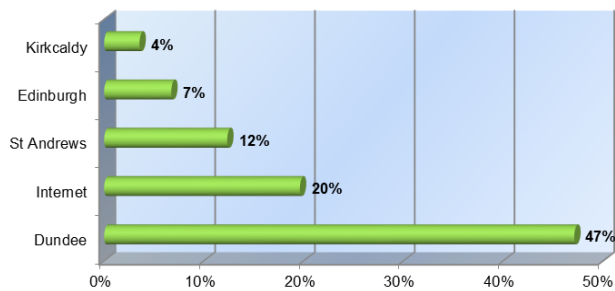
Mid Fife: most frequently visited stores/ centres for DIY and hardware by residents



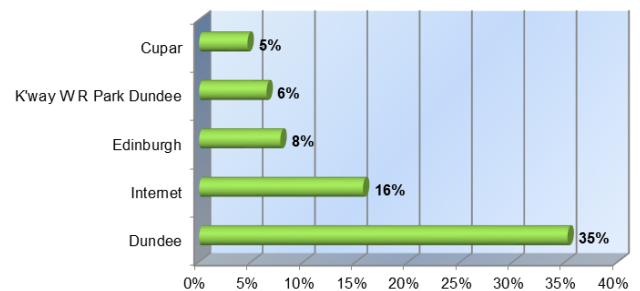
Mid Fife: most frequently visited stores/ centres for mainly personal goods by residents



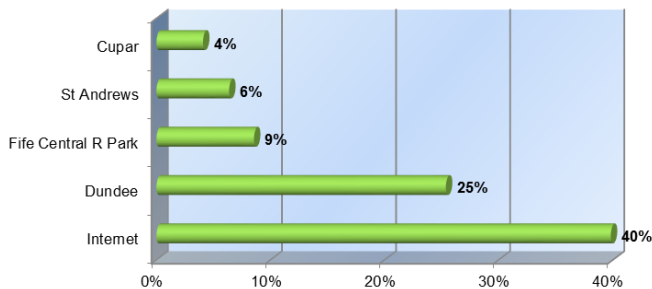
East Fife: most frequently visited stores/ centres for clothes, shoes and other fashion items by residents



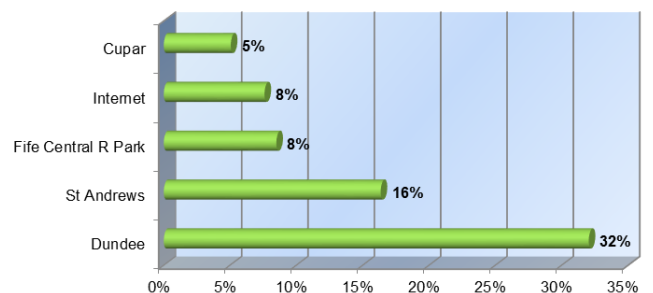
East Fife: most frequently visited stores/ centres for furniture, floorcoverings and soft furnishings by residents



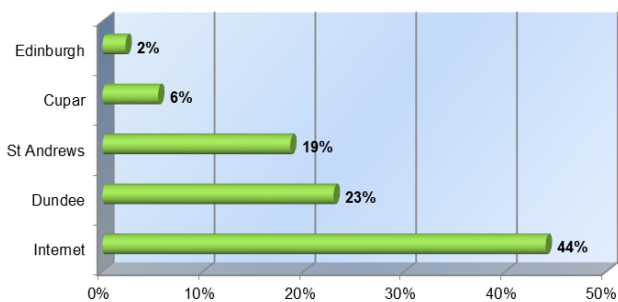
East Fife: most frequently visited stores/ centres for large domestic appliances by residents



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



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



8.5.3 Tables 8.4 to 8.7 show the survey-based comparison expenditure and turnover relationships for each catchment area and for Fife in 2018, 2023 and 2028. Expenditure outflows from East Fife (mostly to Dundee) are proportionally much higher than West and Mid Fife, because there are no major shopping centres in East Fife.

8.6 Comparison floorspace and turnover 2018

8.6.1 The current distribution of comparison floorspace in the three retail catchment areas is shown in Tables 8.8 to 8.10, based on the latest data provided by Goad (2018) and other sources, including data from the Council.

8.6.2 The total turnover in each catchment area is controlled to the survey-based totals shown earlier in this section. While the turnover of the retail warehouses and supermarkets are assumed at average company levels, the turnover relating to the

town centres and villages is collectively derived from the survey totals for each of the three catchments. As for convenience turnover, the turnover ratios for the smaller towns are based on apportionment from the turnover ratio of the largest town centres in each catchment. These are estimated 'actual' levels, not average or benchmark levels.

8.6.3 The tables reveal that Dunfermline is trading relatively strongly. Deduced turnover levels are lower in Mid Fife, which reflects the high level of retail floorspace there. The level of turnover is high in St Andrews, because of the significant attraction of visitor spending identified by recent research.

Table 8.4 West Fife comparison expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		335.2	366.4	413.8
Add: inflows from rest of Fife	13%	43.6	47.6	53.8
inflows from outside Fife	6%	20.3	22.2	25.0
Less: outflows	-33%	-111.9	-122.3	-138.2
Retained expenditure (turnover)		287.1	313.9	354.5
Note				
Inflows and outflows from Appendix 5				

Table 8.5 Mid Fife comparison expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		416.1	453.0	507.9
Add: inflows from rest of Fife	11%	44.9	48.9	54.8
inflows from outside Fife	5%	20.7	22.5	25.2
Less: outflows	-35%	-147.7	-160.8	-180.2
Retained expenditure (turnover)		334.0	363.7	407.7
Note				
Inflows and outflows from Appendix 5				

Table 8.6 East Fife comparison expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		191.5	208.9	235.2
Add: inflows from rest of Fife	3%	6.0	6.5	7.4
inflows from outside Fife	25%	47.8	52.2	58.7
Less: outflows	-70%	-133.2	-145.3	-163.6
Retained expenditure (turnover)		112.1	122.3	137.7
Note				
Inflows and outflows from Appendix 5				

Table 8.7 Fife comparison expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		942.7	1,028.3	1,156.9
Add:				
inflows from outside Fife	9%	88.8	96.8	108.9
Less: outflows	-32%	-298.2	-325.3	-366.0
Retained expenditure (turnover)		733.3	799.9	899.9
Note				
Inflows and outflows from Appendix 5				

Table 8.8				
West Fife: comparison floorspace and turnover, 2018 (in 2017 prices)				
	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
Dunfermline Town Centre				
*Town Centre shops (excl 30% of M&S-conv)	34,364	22,337	7,256	162.1
*Tesco, Winterthur Lane (total 8,000 sq m gross-est 30% comp)	2,400	1,440	6,290	9.1
*ASDA Halbeath (total 9,540 + 1,162 mez) sq m gross- est 45% comp	4,816	2,890	5,347	15.5
ASDA St Leonards-total 4,749 sqm (25% comp)	1,187	712	5,347	3.8
Tesco Duloch-total 6,147 sq m (18% comp)+ ext 2,747 (78% comp)	3,249	1,949	6,290	12.3
Aldi Duloch (1606 sqm gross-est 20% comp)	321	241	6,420	1.5
Dobbies Garden Centre (6,450 sm total- est 60% comp)	3,870	3,096	1,195	3.7
Other Leisure Park (Ed.Wollen Mill Maidenhead Aquatics)	940	752		
Aldi Halbeath Rd (total 1,420 sq m gross- est 15% comp)	213	160	6,420	1.0
Other Dunfermline shops	2,776	1,805	2,903	5.2
*Inverkeithing	1,330	865	2,903	2.5
*Kincardine	240	156	2,903	0.5
*Rest of Dalgety Bay	630	410	2,903	1.2
Aldi, Donibristle, Dalgety Bay (1,500 gross-est 20% comp)	300	225	6,420	1.4
ASDA Dalgety Bay (3,437 sq m gross 20% comp)	687	412	5,347	2.2
Culross/ Rosyth/Cairneyhill/Oakley/ Limekilns/Newmills	963	626	2,903	1.8
*Kelty	700	455	2,903	1.3
Sub total (excl Dunfermline TC)	24,623	16,193		63.0
Cowdenbeath Town Centre				
*Town Centre shops	3,630	2,360	3,265	7.7
Aldi, Stenhouse St, Cowdenbeath (1,587 gross-est 20% comp)	317	238	6,420	1.5
Retail Parks (see Appendix 6)				
Carnegie Retail Park, Dunfermline	7,998	6,398		16.6
Halbeath Retail Park, Dunfermline (excl ASDA)	11,700	9,102		31.4
Sub total	19,698	15,500		47.9
Other Retail Warehouses				
Bed Shed, Baldringburn, Dunfermline	1,110	888	2,300	2.0
Thomsons World of Furniture, Dunfermline	2,500	2,000	1,200	2.4
Connections Furniture, Netherton, Dunfermline	450	360	1,200	0.4
Sub total	4,060	3,248		4.9
Total West Fife	86,692	59,875		287.1
Note				
* Goad gross floorspace data 2018, provided by the Council				
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2017 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 30% for 2018, to allow for the general decline in shop numbers over the period.				
A list of the occupiers in the retail parks in Fife is provided in Appendix 6, including turnover.				
Turnover/floorspace ratio of Cowdenbeath TC assumed at 45% of Dunfermline TC turnover ratio, and small towns assumed at 40% of the Dunfermline TC ratio.				

Table 8.9				
Mid Fife: comparison floorspace and turnover, 2018 (in 2017 prices)				
	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
Kirkcaldy Town Centre				
*Lidl (1,380 gross-15% comp)	207	155	5,618	0.9
*Rest of Town Centre (excl 30% of M&S-conv)	33,221	21,594	4,403	95.1
Sub total	33,428	21,749		95.9
Morrisons, Inveriel				
6,369 sq m gross, 3,519 sq m net-704 sq m comp (20%)	1,274	704	3,626	2.6
ASDA, Kirkcaldy	4,756	2,564	5,347	13.7
11,889 sq m gross (Council)- 6,410 sq m net at 60:40 conv/ comp sales				
*Sainsbury's, Fife Central Retail Park (5,610 sq m gross- 15% comp)	842	505	2,585	1.3
Aldi, McKenzie St, Kirkcaldy (1,493 sq m gross total)- 20% comp	299	224	6,420	1.4
Aldi, Ferrard Rd, Kirkcaldy				
(Total 1606 sq m gross/ 1,125 net- est 20% comp)	321	225	6,420	1.4
Other Kirkcaldy shops (excl Fife Central RP)	5,517	3,586	2,201	7.9
*Lochgelly	2,840	1,846	2,201	4.1
*Burntisland	710	462	2,201	1.0
Sub total	16,557	10,115		33.4
Glenrothes Town Centre				
*Town Centre shops	16,480	10,712	4,403	47.2
*Morrisons, Flemington Rd, Glenrothes (4,850 sq m gross-20% comp)	970	485	3,626	1.8
Lidl, Leslie Rd, Glenrothes (1,000 sq m gross-10% comp)	100	75	5,618	0.4
*Aldi, Flemington Rd, Glenrothes (1,300 sq m gross- est 15% comp)	195	146	6,420	0.9
ASDA, Fullerton Rd, Glenrothes				
(Total 7,897 sq m gross- 3,554 sq m gross comp)	3,554	2,132	5,347	11.4
*Cadham Centre, Glenrothes	60	39	2,201	0.1
*Glenwood shops, Glenrothes	370	241	2,201	0.5
Other Glenrothes shops (notional estimate)	1,000	650	2,201	1.4
Falkland / Freuchie/ Ladybank/ Kingskettle/ L Links/Newburgh	1,643	1,068	2,201	2.4
Sub total	7,892	4,836		18.9
Leven Town Centre				
*Town Centre shops (excluding Riverside Retail Park)	6,280	4,082	3,082	12.6
*Lidl, Mitchell St, Leven (1,060 sq m gross-10% comp)	106	80	5,618	0.4
Aldi, Turpie Rd, Leven-1,480sqm gross, 990 sq m net- 20% comp	296	198	6,420	1.3
Methil (excl Riverside Furnishings)/Buckhaven	1,469	955	2,201	2.1
Leslie/ Markinch	2,412	1,568	2,201	3.5
Aberdour/Dysart/Cardenden/Kinghorn/Kinglassie/Thornton	1,931	1,255	2,201	2.8
Sub total	6,215	4,056		10.0
Retail Parks (see Appendix 6)				
Fife Central Retail Park, Kirkcaldy	21,150	16,222		72.3
Saltire Retail Park, Glenrothes	11,360	9,088		17.0
Riverside R P, Leven incl Home Bargains (less 25% of B&M and HB)	6,223	4,494		20.7
Sub total	38,733	29,804		110.1
Other Retail Warehouses				
*B&M, Flemington Rd, Glenrothes (1,500 sq m gross- 75% comp)	1,125	900	3,977	3.7
Stocks Discount Warehouse, Kirkcaldy (carpets)	2,291	1,833	1,200	2.2
Sub total	3,416	2,733		5.9
Total Mid Fife	129,000	88,086		334.0
Note				
* Goad gross floorspace data 2018, provided by the Council				
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2017 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 30% for 2018, to allow for the general decline in shop numbers over the period. A notional 50% reduction since 20017 is assumed for other Kirkcaldy shops, as in 2017 Retail Capacity Study				
A list of the occupiers in the retail parks in Fife is provided in Appendix 6, including turnover.				
Turnover/floorspace ratio of Glenrothes TC assumed as for Kirkcaldy TC, and Leven TC ratio assumed at 70% of this. Other towns at 50% of Kirkcaldy TC ratio.				

Table 8.10				
East Fife: comparison floorspace and turnover, 2018 (in 2017 prices)				
	Floorspace sq m		Av. turnover ratio £/sq m	Turnover £million
	gross	net		
St Andrews Town Centre				
*Town Centre shops	15,800	10,270	6,681	68.6
Aldi, Tom Stewart Lane, St Andrews (1,331 sq m gross-20% comp)	266	200	6,420	1.3
Other St Andrews shops	1,786	1,161	2,672	3.1
Sub total	2,052	1,360		4.4
Cupar Town Centre				
*Lidl (total 2,000 sq m gross) 20% comp	400	300	5,618	1.7
*Rest of Town Centre	8,890	5,779	4,009	23.2
Sub total	9,290	6,079		24.8
Tesco, Cupar (total 2,033 sq m gross/ 1,338 net-c30% comp- agent data)	610	401	6,290	2.5
Aldi, South Rd, Cupar (total 1,587 sq m gross- 20% comp)	317	238	6,420	1.5
*Anstruther	2,170	1,411	2,672	3.8
Crail / Pittenweem	1,573	1,022	2,672	2.7
Tayport/ Newport	721	469	2,672	1.3
Other East Fife	1,433	931	2,672	2.5
Sub total	6,824	4,472		14.3
Total East Fife	33,966	22,181		112.1
Note				
* Goad gross floorspace data 2018, provided by the Council				
Other gross floorspace provided by Fife Council, based on their 2007 floorspace survey (mainly small settlements), planning applications and the 2017 Retail Capacity Study. Note that the 2007 survey data has been reduced by a notional 30% for 2018, to allow for the general decline in shop numbers over the period.				

8.7 Comparison planning consents & opportunities

8.7.1 Table 8.11 shows the current comparison retail planning consents and current retail planning applications in Fife. These include significant retail consents in Glenrothes and at Halbeath Retail Park.

8.7.2 The table also includes a current, undetermined application for an alternative scheme at South Road, Cupar and additional retailing at Craigtoun, St Andrews (SDA) in the longer term. Neither of these proposals is included in the assessment of spare retail capacity.

8.8 St James Centre

8.8.1 In Edinburgh, work on the redevelopment of the St James Shopping Centre is progressing, with the demolition completed and first signs of new construction appearing on the cleared site. As mentioned in the 2017 Capacity Study, the project will create nearly 55,000 sq m of retail floorspace with an emphasis on fashion and lifestyle. It will also incorporate a multiscreen cinema, restaurants, a luxury hotel and residential uses. The

promoters anticipate that the development will increase the trade draw from Edinburgh's catchment by around 20%. The aim is raise Edinburgh's position in the UK retail rankings from 13th to 8th place.

8.8.2 Assuming the scheme is successful, it will almost certainly attract more trade from Fife after 2020, following its scheduled completion. At this stage, it is too early to predict a level of increased trade draw from Fife in our updated capacity forecasts. However, the prospects of increased comparison expenditure leakage from Fife in the future appear a strong possibility.

Table 8.11 Proposed comparison floorspace in Fife: consents and applications 2018 (in 2017 prices)				
	Floorspace sq m		Turnover ratio £/sq m	Turnover £million
	gross	net		
Planning consents included in the capacity study				
Aldi, Donibristle, Dalgety Bay 15/03782PPP &16/02676 &16/02388 (1,650 sq m gross, 1,125 sq m net-est 80% conv)	330	225	6,420	1.4
Yard Public House site, Admiralty Rd, Rosyth 17/01554/FULL Proposed Lidl supermarket- (total 2,367sq m gross. Conv 2,012 sq m and 355 sq m comp.	355	213	5,618	1.2
North End Park, Cowdenbeath 15/04183/FULL & 15/04183/NM/2-Sept 2018 Unit 1 Discount foodstore (Lidl) 1,794 sq m gross, 1,066 sq m net- est 85% conv. Unit 2 budget mixed goods retailer (B&M) 1,858 sq gross,1,674 sq m net- est 75% comp	269 1,394	160 1,256	5,618 3,977	0.9 5.0
Halbeath Retail Park- extension 16/01927/FULL- subject to S75 agreement Units 9 & 11- 4,532 sq m gross convenience floorspace - for: M&S Simply Food (2,044 sq m gross) Lidl- (2,488 sqm gross total-20% comp) Other proposed units are for bulky goods (5,435 sq m gross)	498 5,435	323 4,348	5,618 2,700	1.8 11.7
Inglis St, Dunfermline 17/01812/FULL- demolition of tile warehouse and devt. of 3 retail units. Total 1,289 sq m gross. Assume 432 sq m for conv. Other 2 units for comparison (432 sq m and 425 sq m)	857	643	3,100	2.0
Freescale site (Shepherd Offshore), Dunfermline -16/03359/ARC Class 1 retail (supermarket) -2,500 sq m gross within masterplan for the site- latest version of previous proposals. Estimate 15% comp.	375	225	4,000	0.9
Queensgate, Glenrothes (Tullis Russell) 15/02008/PPP Retail warehousing with mezzanines. Floorspace- total 8,454 sq m gross, with consent for up to 1,300 sq m net convenience space within the total. Assume 80% net/ gross - so gross comp is 6,829 sqm & net comp is 5,463 sq m	6,829	5,463	3,100	16.9
CISWO site, North St, Glenrothes 15/03140/PPP & 16/02458/ARC 5 units:Class 1 retail and other commercial use options Unit 1 (probably for M&S Simply Food)- 1,021 sq m gross Units 2&3- total 836 sq m & Unit 4 at 445 sq m- could be retail or other Use Classes. Estimate that notional 420 sq m might be comparison retail	420	336	3,100	1.0
South Road, Cupar 15/04188/FULL Floorspace from PPC Supporting Statement Update March 2017- Table 1 Total 4,320 sq m gross, 3,387 sq m net (includes 125 sq m net non-retail) Net comp floorspace- 2,202 sq m (applicants' figure) Net conv floorspace- 1,059 sq m (applicants' figure)		2,022	4,000	8.1
Current applications: not included in the capacity study				
South Road, Cupar 18/00978/FULL (Alternative to current consent) Floorspace from PPC Supporting Statement Update July 2018- Table 1 A Total 7 units: 3,670 sq m gross, 3,353 sq m net Convenience (1,427 sq m net), comparison (1,655 sq m net), Class 3/ t'away (272 sq m net)				
Craigtoun- St Andrews West SDA Proposed expansion of St Andrews. It includes provision for 2,000 sq m gross of retailing. No type specified yet. Potential for a 1,200 sq m supermarket with possibly 800 sq m comparison floorspace				
<p>Note</p> <p>Gross floorspace from the Council. Estimated turnover of the consents are based on company averages from the 2018 Retail Rankings, where the retailer is named. For other consents, a nominal turnover ratio has been applied. Very minor retail consents have not been included.</p> <p>Estimated turnover of the current applications is not shown here because the applications are yet to be determined, with the details agreed under individual assessments.</p>				

9 Comparison expenditure capacity

9.1 Introduction

9.1.1 As explained at the beginning of section 7, the planning context for defining spare capacity is the level of new retail development that can be accommodated without threatening the vitality and viability of established town centres. Spare retail capacity can exist in the following forms, as previously explained:

- Over-trading (not usually relevant for comparison retail capacity- see text below)
- Growth in retained expenditure (turnover)
- Potential to claw back expenditure leakage
- Potential to attract new trade into the area
- 'Acceptable' levels of impact- see section 7

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

9.2 Spare comparison expenditure capacity

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

9.2.2 Forecast growth in retained expenditure (turnover) in the retail catchment areas is substantial to 2028 (Tables 8.4-8.9), and it offers the principal source of spare capacity to support additional comparison retail floorspace. However, it is also probable that a significant amount of the forecast expenditure growth will materialise as internet-based retail spending.

9.2.3 With increased concentration of multiple retailer demand and investment in the largest cities and malls in Scotland, the prospects of clawing back significant comparison expenditure leakage from Fife appear rather limited.

9.2.4 So, the approach adopted to calculate spare convenience capacity in section 7 is better modified to bring the comparison expenditure capacity forecasts for Fife closer to the direction of the retail development market.

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

9.2.6 For the *low estimate*, a higher rate of growth in the proportion of SFT (mainly internet spending) has been assumed. There is great uncertainty over the future rate of growth in internet retail spending, so it is reasonable to include a variant in this key factor to provide a range of forecasts. All the evidence is that the proportion of internet retail spending increasing, and there is no reason to suppose why that direction will change over the next few years.

9.2.7 It should be noted that, simply having a low estimate, whether by increased internet spending or by increased expenditure leakage from Fife, is entirely appropriate, given our comments on redevelopment of the St James Centre in Edinburgh.

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

9.2.9 Forecasts beyond 2023 should be viewed with caution, because of the greater uncertainties.

9.3 Spare comparison expenditure capacity

9.3.1 **High estimates-** Tables 9.1 to 9.3 show the forecast spare comparison expenditure for each of the three retail catchment areas up to 2023 and 2028, after deducting turnover relating to existing planning consents. The broadly-estimated net floorspace equivalents relate to those in the main town centres in each retail catchment area.

9.3.2 In West Fife, the forecast spare capacity up to 2028 at the high end of the range is about £42 million, with equivalent retail

Table 9.1			
West Fife: forecast spare comparison expenditure capacity (in 2017 prices)			
	2018-23 £million	2023-28 £million	2018-28 £million
High estimate			
(a) Growth in retained expenditure (turnover)- Table 8.4	26.8	40.6	67.4
(b) Less planning consents: - Table 8.11	-25.0		-25.0
High estimate (a-b)	1.8	40.6	42.4
Low estimate			
(a) Growth in retained expenditure (turnover)- Appendix 7	17.8	33.7	51.5
(b) Less planning consents: - Table 8.11	-25.0		-25.0
Low estimate (a-b)	-7.2	33.7	26.5
Equivalent comparison floorspace	£ per sq m	£ per sq m	
Turnover/ floorspace ratio- high	7,775	8,747	
Turnover/ floorspace ratio- low	7,553	8,356	
	sq m net	sq m net	sq m net
High	200	4,600	4,800
Low	-900	4,000	3,100
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
* The turnover ratio derives from the current turnover ratio in Dunfermline TC £ 7,127			
The ratio is increased to relate to 2023 and 2028, based on % turnover growth in Fife -Table 8.7 (high) and Appendix 7 (low)			

Table 9.2			
Mid Fife: forecast spare comparison expenditure capacity (in 2017 prices)			
	2018-23 £million	2023-28 £million	2018-28 £million
High estimate			
(a) Growth in retained expenditure (turnover)- Table 8.5	29.7	44.0	73.7
(b) Less planning consents: - Table 8.11	-18.0		-18.0
High estimate (a-b)	11.7	44.0	55.7
Low estimate			
(a) Growth in retained expenditure (turnover)- Appendix 7	19.3	36.2	55.4
(b) Less planning consents: - Table 8.11	-18.0		-18.0
Low estimate (a-b)	1.3	36.2	37.5
Equivalent comparison floorspace	£ per sq m	£ per sq m	
Turnover/ floorspace ratio- high	4,803	5,403	
Turnover/ floorspace ratio- low	4,665	5,161	
	sq m net	sq m net	sq m net
High	2,400	8,100	10,500
Low	300	7,000	7,300
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
* The turnover ratio derives from the current turnover ratio in Kirkcaldy TC £ 4,403			
The ratio is increased to relate to 2023 and 2028, based on % turnover growth in Fife -Table 8.7 (high) and Appendix 7 (low)			

Table 9.3			
East Fife: forecast spare comparison expenditure capacity (in 2017 prices)			
	2018-23 £million	2023-28 £million	2018-28 £million
High estimate			
(a) Growth in retained expenditure (turnover)- Table 8.6	10.2	15.4	25.6
(b) Less planning consents: - Table 8.11	-8.1		-8.1
High estimate (a-b)	2.1	15.4	17.5
Low estimate			
(a) Growth in retained expenditure (turnover)- Appendix 7	6.7	12.7	19.4
(b) Less planning consents: - Table 8.11	-8		-8
Low estimate (a-b)	-1.4	12.7	11.3
Equivalent comparison floorspace	£ per sq m	£ per sq m	
Turnover/ floorspace ratio- high	7,288	8,199	
Turnover/ floorspace ratio- low	7,080	7,832	
	sq m net	sq m net	sq m net
High	300	1,900	2,200
Low	-200	1,600	1,400
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. <i>Figures are rounded.</i>			
* The turnover ratio derives from the current turnover ratio in St Andrews TC £ 6,681			
The ratio is increased to relate to 2023 and 2028, based on % turnover growth in Fife -Table 8.7 (high) and Appendix 7 (low)			

floorspace of 4,800 sq m net. However, there is little spare capacity up to 2023. In Mid Fife, the forecast spare capacity is up to £56 million by 2028, with an equivalent retail floorspace of 10,500 (the applied turnover/ floorspace ratio is lower than that for West Fife). In East Fife, the forecast spare capacity at the high end is up to nearly £18 million by 2028, with equivalent retail floorspace of 2,200 sq m net.

9.3.3 **Low estimates-** the forecast spare comparison capacity at the low end of the range is based on Tables A, B and C in Appendix 7.

9.3.4 In Table A, the higher level of SFT (mainly internet expenditure) has been raised to 32% in 2023, instead of 30% in the high estimate. By 2028, it is raised to 36%.

9.3.5 Under the low estimates, the forecast spare capacity in West Fife would be nearly £27 million by 2028. In Mid Fife, it would be nearly £38 million and in East Fife it would be £11 million by 2028.

9.4 Interpretation

9.4.1 As stated earlier in this report, forecast retail capacity is a broad-brush exercise. New retail developments will also be partly serviced by trade diversion from existing

stores and centres, which is a factor not included in retail capacity studies generally.

9.4.2 The current list of comparison retailer requirements in Tables 5.5 to 5.7 represent a 'snapshot' view. Some of the requirements may relate to existing premises as well as new build.

9.4.3 In West Fife, the forecast spare comparison expenditure is very limited up to 2023, but after that, would comfortably support significant new development. In our view, the limited current comparison retail requirements in Table 5.5 could also be supported before 2023, mainly by trade diversion from other retailers.

9.4.4 In Mid Fife, the forecast spare capacity could readily support the forecast comparison retailer requirements in Table 5.6 and more beyond 2023. In East Fife, the forecast spare comparison expenditure capacity is limited up to 2023 but would support additional floorspace up to 2028. Some of the comparison retailer requirements in Table 5.7 could be supported up to 2023 by trade diversion from other stores, and probably all the requirements could be supported by spare capacity beyond 2023.

10 Conclusions

10.1 Retail market trends

10.1.1 Consumer expenditure on retail goods in Scotland has grown very slowly since 2015. Anxiety over the outcome of Brexit negotiations is affecting business confidence generally, including investment in retail and commercial property.

10.1.2 The retail market continues to concentrate on large cities, destination shopping malls, and retail parks, with increasing online shopping having a marked influence on the high streets in terms of store closures. These factors add pressure on small and mid-sized town centres, such as those in Fife. Nevertheless, retailing remains a crucial economic component of town centre activities.

10.1.3 Budget retailers, including food discount stores and budget mixed goods operators are still increasing their representation, but mostly in purpose built units, mostly not in traditional town centres. In the grocery sector, there is no evidence of market interest in developing large supermarkets any more.

10.1.4 The leisure sector, including non-retail services such as restaurants/ cafes/ take-aways and health and beauty, has been more buoyant in support of the high streets. However, there is some evidence of saturation arising in some towns. In other non-retail sectors, the decline in bank branch representation has been dramatic in recent times.

10.2 Fife retail market

10.2.1 As in 2016, Dunfermline town centre is performing well, with good multiple representation, a relatively high average turnover/floorspace ratio and higher retail rents than other towns in Fife. The offer at the adjacent Carnegie Retail Park complements the town centre. Halbeath Retail Park also appears to be trading well. A vast Amazon depot is located by Halbeath.

10.2.2 The comparative performance in Kirkcaldy and Glenrothes town centres is less robust than Dunfermline, with lower rents and higher vacancy rates. However, multiple

representation in these towns is good, and there has only been a small decline in occupied shops since 2012. Both these town centres are in need of major investment to improve their attraction.

10.2.3 Fife Central Retail Park appears to be trading strongly and recent investment by the owners has increased its range of retailers. It is a competing attraction to Kirkcaldy and Glenrothes. Saltire Retail Park offers a limited range to mainly serve Glenrothes.

10.2.4 Cowdenbeath is not trading strongly, with low retail rents and a high vacancy rate. The retail offer will be improved by the development at North End Park. Leven is trading at a moderate level and retail rents have held up. The offer, combined with Riverside Retail Park, is budget-orientated.

10.2.5 St Andrews continues to trade strongly for its size, with a high-quality retail offer accommodated in mainly small units. The vacancy rate is very low. Its role as an affluent University town and popular visitor destination will be driving this situation. Recent research has revealed much higher visitor spending in the town, compared to previous estimates.

10.2.6 Cupar trades at a moderate level as a local service centre. It has lost the most shops in proportion to its size among the main Fife towns since 2012. Rents appear to have fallen since 2016, but the vacancy rate is lower than most other towns in Fife. Its planned expansion will bring opportunities for consideration of additional retailing in the future.

10.3 Forecast convenience retail capacity

10.3.1 Under the forecast range, there will be substantial negative spare convenience expenditure capacity in West Fife (-£52 to -£59 million) and a small amount of spare expenditure capacity in Mid Fife over the next ten years. There is more surplus expenditure capacity in East Fife.

10.4 Forecast comparison retail capacity

10.4.1 In West Fife, the forecast spare comparison expenditure is very limited up to 2023, but after that, would comfortably support

significant new development. Under the high estimate, the spare capacity is forecast at some £42 million.

10.4.2 In Mid Fife, the forecast spare capacity is up to £56 million under the high estimate by 2028, but most of this forecast capacity is after 2023, under both the high and low estimates.

10.4.3 In East Fife, the forecast spare comparison expenditure capacity is limited up to 2023 but would support additional floorspace up to 2028. Under the high forecast, the spare capacity would be nearly £18 million by 2028.

10.4.4 With the level of internet shopping still predicted to rise, together with the likely effects of trade draw to the St James Centre development after it opens in 2020, competition will intensify to retain comparison expenditure in Fife in the future.

Appendix 1

Fife retail catchment areas- postcode sector composition and survey zones

Fife Household Survey 2016- Three catchment areas and zones

Zone 2016	Name	Postcode Sectors 2011 Census	Population 2011 Census
1	West Fife Dunfermline	KY11-3, 11-4, 11-7, 11-8, 12-0, 12-7, 12-8 FK10-4 part in Fife, KY12-9 part in Fife Total	58,418 14,442 72,860
2	Dalgety Bay/ Rosyth	KY11-1, 11-2, 11-9 (incl. Inverkeithing)	29,872
3	Cowdenbeath/ Kelty	KY4-0 part in Fife, KY4-8, KY4-9 West Fife Total	20,876 123,608
4	Mid Fife Kirkcaldy	KY2-5, 2-6 KY1-1, 1-2, 1-3, 1-4 KY3-0, 3-9 (Aberdour/ Burntisland/ Kinghorn) KY5-0 part in Fife (Cardenden/ Kinglassie) KY5-8, 5-9 (Lochgelly/ Lochore/Ballingry) Total	30,661 25,235 11,022 7,528 12,639 87,085
5	Glenrothes	KY6-1, 6-2, 6-3, KY7-4, 7-5, 7-6 KY15-7 KY14-6 part in Fife, 14-7 part in Fife (incl Newburgh) Total	46,736 6,831 6,766 60,333
6	Leven/ Methil	KY8-1, 8-2, 8-3, 8-4	21,983
7	Kennoway	KY8-5, 8-6 Mid Fife Total	12,459 181,860
8	East Fife Cupar	KY15-4, 15-5	14,871
9	St Andrews	KY16-0, 16-8, 16-9 (incl Leuchars) DD6-8, 6-9 (incl Tayport) Total	24,843 9,334 34,177
10	East Neuk	KY9-1, 10-2, 10-3 East Fife Total	10,682 59,730
		Fife Total	365,198

Notes:

2011 Census population data and postcode sector definitions from National Records Scotland

Appendix 2

Fife household survey 2016 - list of questions

Identify person responsible for the majority of food shopping in household

Shopping questions

- Q01 Where did you last do your MAIN FOOD shopping for the household?
- Q01A Which internet retailer did you use on that trip?
Those who said Internet at Q01
- Q02 Where did you last go the time before that to do your MAIN FOOD shopping? Was it the same or different, please specify
- Q02A Which internet retailer did you use on that trip?
Those who said Internet at Q02
- Q03 Where did you last go to do small, day-to-day TOP-UP food shopping?
- Q03A Which internet retailer did you use on that trip?
Those who said Internet at Q03
- Q04 On average, how often do you do your MAIN food shopping?
- Q05 On average, how often do you do your TOP-UP food shopping?
- Q06 Could you tell me what other things you usually combine with doing your MAIN food shopping?
- Q07 Where do you visit most often to buy clothes, shoes and other fashion items?
Respondents invited to name more than one destination- Record up to two destinations . Same for Q8-Q11.
- Q08 Where do you visit most often to buy furniture, floor coverings and soft furnishings?
- Q09 Where do you visit most often to buy large domestic electrical appliances such as fridges, washing machines, vacuum cleaners etc?
- Q10 Where do you visit most often to buy DIY and hardware?
- Q11 Where do you visit most often to buy other items of a mainly personal nature, such as sports goods, jewellery, books, toys, CD's, computers, mobiles, cameras, electronic games etc?
- Q12 How often do you use the Internet for buying non-food goods such as personal items and household goods?
- Q13 What is the main reason why do you never do non-food shopping via the Internet?
- Q14 Thinking about Internet shopping for non-food items such as personal items and household goods, what do you like most about shopping on the Internet?
- Q15 Looking to the future, how frequently do you intend to use the Internet for non-food shopping?
- Town centre use and perception questions- only ask respondents from the associated catchment area**
- Q16 Thinking about ...Town Centre, how often do you visit it, on average?
- Q17 How do you normally travel to ...Town Centre?
- Q18 What typically, are your main reasons for visiting ...Town Centre (i.e. what range of things do you do when you get there)?
- Q19 On average, how long do you normally spend in ...Town Centre when you visit?
- Q20 What do you LIKE MOST about ...Town Centre for shopping and as a place to visit generally?
- Q21 What do you DISLIKE MOST aboutTown Centre for shopping and as a place to visit generally?
- Q22 Overall, how do you rate ...Town Centre on the following aspects as 'Good', 'Average' or 'Poor'?
- Q23 What improvements to ...Town Centre would make you visit there more often?
- Q24 On average, how often do you visit ...Town Centre in the evenings (i.e. after 6pm)?
- Q25 Why do you never visit ..Town Centre? *(for those who said never in Q16)*
- Q26 What would make you visit...Town Centre more often in the evenings?
- Q27 Do you undertake any of the following leisure related activities when you visit ...named Town ?
- Holiday questions- all respondents**
- Q28 How many short holiday breaks (up to about 4 days) do you take each year?
- Q29 Where are these usually taken ?
Read out list: Fife/ Scotland/ abroad etc- record for each heading
- Q30 How often do you visit the following attractions in Fife each year?
Read out list: Sports centres/ Museums etc- record for each heading
- GEN Gender of respondent.
- AGE Which of the following age ranges do you fall in to?
- OCC What is the occupation of the chief income earner in your household?
- PC Postcode of home address

Appendix 3

Fife retail catchment areas- population forecasts

Fife retail catchment area population projections-Projections by Experian for the 2018 Study <i>(Not applied directly in this Study)</i>				
Retail catchment area	Census 2011	2018	2023	2028
West Fife	123,608	133,967	136,115	138,438
Mid Fife	181,860	187,725	189,959	191,788
East Fife	59,730	64,624	65,512	66,432
Total Fife (Experian)	365,198	386,316	391,586	396,658
NRS 2016 based population projections for Fife		372,102	375,880	378,473
Note The 2011 data is directly from the 2011 Census, Scotland. The projected populations for 2018, 2023 and 2028 are Experian's own projections for the Retail Capacity Study				

Fife retail catchment area population projections- underpins Table 1.1				
Retail catchment area	Census 2011	2018	2023	2028
West Fife	123,608	129,038	130,656	132,091
Mid Fife	181,860	180,818	182,340	182,995
East Fife	59,730	62,246	62,884	63,386
Total Fife	365,198	372,102	375,880	378,473
Note The 2011 data is taken directly from the 2011 Census, Scotland, based on postcode sector population data for each catchment. The projected populations for 2018,2023 and 2028 derive from the Experian projections for each catchment area, re-apportioned to the NRS 2016 based population projections for Fife as a whole. See Appendix 1				

Appendix 4

Convenience expenditure inflows and outflows, including visitor spending

Convenience expenditure inflows 2018					
	West Fife	Mid Fife	East Fife		
Residents' expenditure potential by catchment area 2018	£ million 298.9	£ million 410.9	£ million 161.7		
	Origin- inflows from:			Total inflow	
Destination	West Fife	Mid Fife	East Fife	From rest of Fife £ million	Visitor spend £ million
West Fife		8%	0%	32.6	10.9
Mid Fife	4%		10%	26.7	11.1
East Fife	0%	3%		11.3	25.7
Total				70.61	47.8

Convenience expenditure outflows 2018				
	Origin			
	West Fife	Mid Fife	East Fife	Total Fife
Retained expenditure by catchment	92%	87%	73%	94%
Total outflows	8%	13%	27%	6%
Outflows to centres outside Fife	5%	2%	17%	

Visitor spending on shopping- Economic Impact of Tourism, Fife & Districts 2017- assumed for 2018 (by Destination Research Consultants- report held by Fife Council)					
	£million	%			
*Total direct visitor spending in Fife	415.2			page 9	
Total visitor spend on shopping in Fife	138.1	33%		page 9	
Study area 'Districts' in the above report					
	Dunfermline District £million	Kirkcaldy District £million	St Andrews District £million	NE Fife District £million	*Fife Total £million
Total direct visitor spending *pages 16-19	94.5	96.4	137.3	85.6	413.8
Deduced spending on shopping (33%)	31.2	31.8	45.3	28.2	136.6
<i>*Fife totals do not match precisely in the report. NE Fife includes Cupar and the rest of East Fife, excluding St Andrews</i>					
Assume for the 3 Catchment Areas in the Fife Retail Capacity Study in 2018 (based on 2017 data)					
	West Fife £million	Mid Fife £million	East Fife £million		
All shopping spend	31.2	31.8	73.6		
Convenience 35%- estimate	10.9	11.1	25.7		
Comparison 65%- estimate	20.3	20.7	47.8		
<i>Estimates by R MacLean based on other research</i>					

Appendix 5

Comparison expenditure inflows and outflows, including visitor spending

Comparison expenditure flows					
	West Fife	Mid Fife	East Fife		
Residents' expenditure potential by catchment area 2018	£ million 335.2	£ million 416.1	£ million 191.5		
Destination	Origin- inflows from:			Total inflow	
	West Fife	Mid Fife	East Fife	From rest of Fife £ million	Visitor spend £ million
West Fife		10%	1%	43.6	20.3
Mid Fife	7%		10%	44.9	20.7
East Fife	0%	1%		6.0	47.8
Total				94.51	88.8

Comparison expenditure outflows				
	Origin			
	West Fife	Mid Fife	East Fife	Total Fife
Retained expenditure by catchment	67%	65%	30%	58%
Total outflows	33%	35%	70%	42%
Outflows to centres outside Fife	26%	24%	58%	32%

Visitor spending on shopping- Economic Impact of Tourism, Fife & Districts 2017 (by Destination Research Consultants- report held by Fife Council)					
		£million	%		
*Total direct visitor spending in Fife		415.2		page 9	
Total visitor spend on shopping in Fife		138.1	33%	page 9	
Study area 'Districts' in the above report					
	Dunfermline District	Kirkcaldy District	St Andrews District	NE Fife District	*Fife Total
	£million	£million	£million	£million	£million
Total direct visitor spending	94.5	96.4	137.3	85.6	413.8
*pages 16-19					
Deduced spending on shopping (33%)	31.2	31.8	45.3	28.2	136.6
<i>*Fife totals do not match precisely in the report. NE Fife includes Cupar and the rest of East Fife, excluding St Andrews</i>					
Assume for the 3 Catchment Areas in the Fife Retail Capacity Study in 2018 (based on 2017 data)					
	West Fife	Mid Fife	East Fife		
	£million	£million	£million		
All shopping spend	31.2	31.8	73.6		
Convenience 35%- estimate	10.9	11.1	25.7		
Comparison 65%- estimate	20.3	20.7	47.8		
<i>Estimates by R MacLean based on other research</i>					

Appendix 6

Retail Parks in Fife- list of retailers

West Fife- Retail Parks: floorspace and turnover, 2018 (in 2017 prices)				
	Floorspace sq m		Turnover ratio £/sq m	Turnover £million
	gross	net		
*Carnegie Retail Park				
B & Q	3,480	2,784	2,576	7.2
Home Bargains (1,010 sq gross- 75% comp)	758	606	8,488	5.1
Pagazzi Lighting	730	584	2,100	1.2
Farmfoods (convenience)				
Dreams	1,030	824	2,354	1.9
Matalan	2,000	1,600	2,069	3.3
Vacant unit (780 sq m gross)-now PureGym				
Vacant unit (1,520 sq m gross)				
Total	7,998	6,398		18.8
*Halbeath Retail Park				
Argos	470	118	20,433	2.4
Bensons for Beds	480	384	2,263	0.9
Carphone Warehouse	580	464	11,991	5.6
Pets at Home	2,890	2,312	2,791	6.5
Currys & PC World	580	464	11,991	5.6
Carpetright	970	776	1,336	1.0
Harveys Furnishings	480	384	2,263	0.9
B&M	1,800	1,440	3,977	5.7
Homebase	3,450	2,760	1,415	3.9
Halfords (non-retail)- 460sq m gross				
Total	11,700	9,102		32.4
Other retail warehouses				
Bed Shed, Baldrigeburn	1,110	888	2,263	2.0
Thomsons World of Furniture	2,500	2,000	1,200	2.4
Connections- furniture, Nethertown	450	360	1,200	0.4
Total	4,060	3,248		4.8
Total West Fife	23,758	18,748		56.0
Sources:				
* Goad, where indicated. Otherwise, Council data				
Company average turnover ratios applied, based on Retail Rankings 2018, adjusted to include VAT				

Mid Fife- Retail Parks: floorspace and turnover, 2018 (in 2017 prices)				
	Floorspace sq m		Turnover ratio £/sq m	Turnover £million
	gross	net		
*Saltire Retail Park, Glenrothes				
Bensons	900	720	2,263	1.6
Matalan	3,160	2,528	2,069	5.2
Poundstretcher	2,420	1,936	2,087	4.0
Homebase	3,420	2,736	1,415	3.9
Carpetright	880	704	1,336	0.9
The Pet Hut	580	464	2,791	1.3
Vacant unit (1,020 sq m gross)				
Total	11,360	9,088		17.0
*Fife Central Retail Park, Kirkcaldy				
Carphone Warehouse	430	344	11,991	4.1
Currys & PC World	1,040	832	11,991	10.0
Bensons	780	624	2,263	1.4
Next	1,570	1,256	4,176	5.2
Next Home	360	288	4,176	1.2
Boots	1,160	928	3,233	3.0
Pets at Home	940	752	2,791	2.1
Harveys & Reid	750	600	2,263	1.4
Poundworld	660	528	2,087	1.1
B&Q	4,930	3,944	2,576	10.2
Early Learning Centre	60	48	4,505	0.2
EE	150	120		
Mothercare	1,410	1,128	4,505	5.1
Argos	1,270	318	20,433	6.5
Tapi Carpets & Floors	1,300	1,040	753	0.8
Oak Furniture Land	770	616	7,555	4.7
Sofology	1,160	928	6,897	6.4
Sofastore	220	176	2,716	0.5
Wren Kitchens	1,360	1,088	7,121	6.1
DW Sports	830	664	3,780	2.5
Vacant unit (950 sq m gross)				
Halfords (non-retail)- 1,030 sq m gross				
Total	21,150	16,222		72.3
*Riverside Retail Park, Leven				
B&M, Riverside RP (1,530 sq m gross- 75% comp)	1,148	918	3,977	3.7
Argos	880	220	20,433	4.5
Home Bargains, Riv. Rd (2060 sq m gross- 75% comp)	1,545	1,236	8,488	10.5
B&Q	2,650	2,120	2,576	5.5
Total	6,223	4,494		24.1
Other retail warehouses				
*B&M, Flemington Rd, Glenrothes (1,500 sq m gross- 75% comp)	1,125	900	3,977	3.6
Stocks Discount, Kirkcaldy- carpets	2,291	1,833	1,200	2.2
Riverside Home Furnishings, Methil (closed?)				
Total	3,416	2,733		5.8
Total in Kirkcaldy Catchment	42,149	32,536		119.2
Sources:				
* Goad, where indicated. Otherwise, Council data				
Company average turnover ratios applied, based on Retail Rankings 2018, adjusted to include VAT				

Appendix 7

Low comparison expenditure forecast

Table A				
Fife comparison expenditure per capita per annum (in 2017 prices)				
<i>(with higher forecast increases in the proportion of SFT)</i>				
Catchment areas	2016	2018	2023	2028
	£	£	£	£
West Fife	3,347	3,454	4,007	4,676
Mid Fife	2,965	3,060	3,549	4,142
East Fife	3,964	4,091	4,745	5,538
<i>*excluding special forms of trading</i>				
West Fife		2,597	2,724	2,993
Mid Fife		2,301	2,413	2,651
East Fife		3,076	3,227	3,544
Note				
Original Experian figures for 2016 are in 2016 prices. These have been adjusted to 2017 prices by a factor of				1.01220
from <i>Experian Retail Planner Briefing Note 15, Appendix 4b- dated December 2017</i>				
The growth rates derive from the above Experian document, Appendix 4a.				
		2016-18	2018-23	2023-28
Growth rates		1.0320	1.1599	1.1671
*An allowance for special forms of trading (SFT) is deducted so that the expenditure per capita relates to sales from conventional retail floorspace.				
Rest- as in Table 8.1, except for assuming higher forecast proportions of SFT (R MacLean)- see below				
		-24.8%	-32.0%	-36.0%

Table B					
Fife residents' comparison expenditure potential (in 2017 prices)					
<i>Excluding SFT (special forms of trading)</i>					
Catchment areas	2018	<i>growth</i>	2023	<i>growth</i>	2028
	£ million	<i>2018-23</i>	£ million	<i>2023-28</i>	£ million
		<i>£ million</i>		<i>£ million</i>	
West Fife	335.2	20.8	356.0	39.3	395.3
Mid Fife	416.1	24.0	440.1	45.1	485.1
East Fife	191.5	11.4	202.9	21.8	224.7
Total Fife	942.7	56.2	998.9	106.1	1,105.1
Note					
From Tables 1.1 and Table A. Figures are rounded.					

Table C1				
West Fife comparison expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		335.2	356.0	395.3
Add: inflows from rest of Fife	13%	43.6	46.3	51.4
inflows from outside Fife	6%	20.3	21.5	23.9
Less: outflows	-33%	-111.9	-118.8	-132.0
Retained expenditure (turnover)		287.1	304.9	338.6
Note				
Inflows and outflows from Appendix 5				

Table C2				
Mid Fife comparison expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		416.1	440.1	485.1
Add: inflows from rest of Fife	11%	44.9	47.5	52.4
inflows from outside Fife	5%	20.7	21.9	24.1
Less: outflows	-35%	-147.7	-156.2	-172.2
Retained expenditure (turnover)		334.0	353.3	389.4
Note				
Inflows and outflows from Appendix 5				

Table C3				
East Fife comparison expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		191.5	202.9	224.7
Add: inflows from rest of Fife	3%	6.0	6.4	7.0
inflows from outside Fife	25%	47.8	50.7	56.1
Less: outflows	-70%	-133.2	-141.1	-156.2
Retained expenditure (turnover)		112.1	118.8	131.6
Note				
Inflows and outflows from Appendix 5				

Table C4				
Fife comparison expenditure and turnover (in 2017 prices)				
	%	2018 £million	2023 £million	2028 £million
Main catchment residents' expenditure potential		942.7	998.9	1,105.1
Add:				
inflows from outside Fife	9%	88.8	94.1	104.0
Less: outflows	-32%	-298.2	-316.0	-349.6
Retained expenditure (turnover)		733.3	777.0	859.6
Note				
Inflows and outflows from Appendix 5				