DUMFRIES AND GALLOWAY COUNCIL

Local Development Plan

Technical Paper

Retail Capacity Study

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Dumfries & Galloway

Dumfries & Galloway Council

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Planning & Development Consultancy
in association with Ryden

Dumfries & Galloway Retail Capacity Study

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1 Introduction and catchment area population projections

1.1 Introduction

1.1.1 **Roderick MacLean Associates Ltd** was commissioned by Dumfries & Galloway Council to prepare this report. It replaces the Council's previous Retail Capacity Study, dated 2006. **Ryden** provide much of the retail market appraisal.

1.1.2 A number of research objectives were set out in the brief:

- To provide updated retail information for the Local Development Plan, for the period 2012-22;
- Quantify the expenditure leakage from Dumfries & Galloway and also from the two defined catchment areas (i.e. those relating to Dumfries and Stranraer), by three categories of goods (convenience, bulky comparison goods and other comparison goods);
- Quantify the scope for additional retail floorspace by category for the Council area, and for the two catchment areas, for 2012-17 and for 2017-22;
- Provide a range of retail capacity scenarios under varying population forecasts;
- Take account of major retail proposals and commitments in Dumfries & Galloway which could influence shopping patterns;
- Include qualitative information and expert opinion to underpin the quantitative research; and
- Provide advice on a strategy to reduce retail expenditure leakage from Dumfries & Galloway.

1.1.3 As part of addressing the above objectives, the study brief also contained a number of required outputs in addition to the quantitative capacity assessment. These include:

- An assessment of potential retailer demand to locate in Dumfries & Galloway, set out in a similar fashion to the 2006 Study, showing retailer interests listed in tables for the two catchment areas. Comparison should be made with the demand in 2006;
- The above will include retailer requirements for: Dumfries and Stranraer town centres, Dumfries Retail Park, Peel Centre, Cuckoo Bridge and the Gretna Outlet Centre;
- Commentary on general retailer demand in Dumfries & Galloway, general retail trends and advice on the latest retailer formats;
- Identification of retail sectors that are expanding and their market/ location requirements;
- An overview of the main town centres and the ideal locational distribution of retail floorspace. This will also include a review of the potential for the six small towns named in paragraph 3.12 of the brief;
- Illustration of alternative capacity forecasts under different growth projections, expressed as equivalent retail floorspace;
- Advice on developing retail policy. This should demonstrate the understanding between qualitative issues and the quantitative analysis, to identify where future spare capacity should be directed. It will include advice on retailing and town centre regeneration; and
- Addressing specific issues which include: applying limitations on comparison floorspace in supermarkets; future supermarket provision where population is decreasing and optimum formats for new neighbourhood centres.

1.2 Retail catchment areas

1.2.1 As in the Retail Capacity Study 2006, the current update provides forecasts of retail expenditure capacity for two sub areas: (1) the Dumfries main catchment area, and (2) the Stranraer main catchment area. These areas are illustrated in Map 1.1, which comprise groups of postcode sectors, as set out in Appendix 1.

1.3 Capacity forecasts and price base

1.3.1 The forecasts of spare retail expenditure capacity are for 2012-17 and for 2012-22. It is clearer to show the forecasts over the five and ten year periods, compared to consecutive five year periods, because some parts of the forecast spare capacity could relate to either five year period.

1.3.2 All values are expressed in constant 2010 prices. Definition of *convenience goods, bulky goods* and *other comparison goods* are provided in sections 5 and 7 of this study.

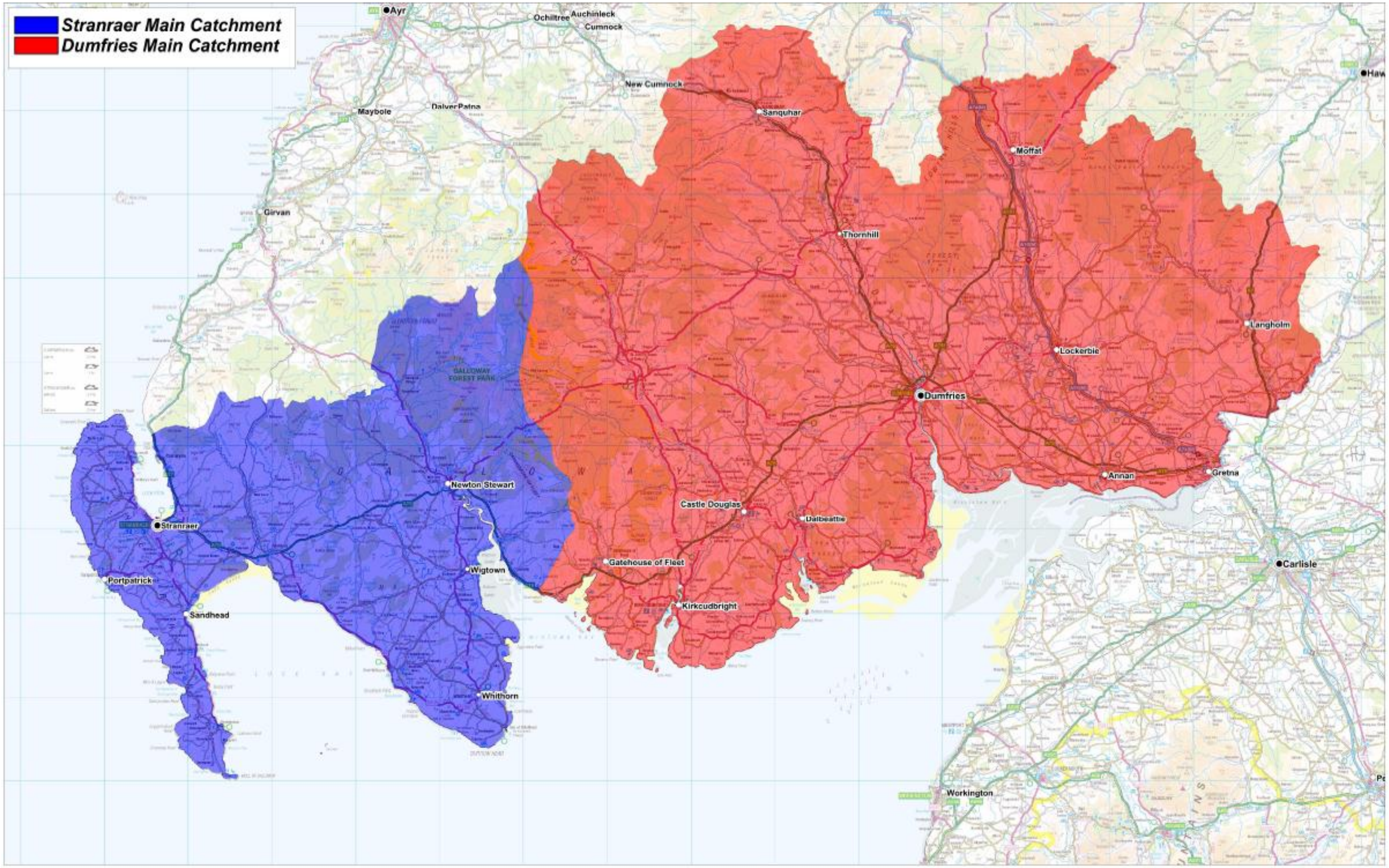
1.4 Population projections

1.4.1 The current and projected populations of Dumfries & Galloway are shown in Table 1.1, based on the Registrar General's 2010 based population projections. The table also shows the populations of the two main retail catchment areas. There is a slight projected decline in population over the next ten years.

Table 1.1
Dumfries & Galloway and the main retail catchment areas: population projections

	2010	2012	2017	2022
Dumfries main catchment	118,584	118,668	118,298	117,588
Stranraer main catchment	29,606	29,627	29,535	29,357
Dumfries & Galloway	**148,190**	**148,295**	**147,833**	**146,945**

Source: 2001 Census population by postcode sectors and Registrar General's 2010 based population projections - see Appendix 1



Dumfries & Stranraer Main Retail Catchment Areas

Map 1.1

Pitney Bowes Software

2 Policy framework

2.1 Introduction

2.1.1 This section contains a summary of the planning policy framework on retailing for Dumfries & Galloway. It includes reference to the main retail-related issues in the emerging Local Development Plan and how the updated capacity study will contribute to addressing the retail issues.

2.2 SPP

2.2.1 Since the 2006 Capacity Study, the Scottish Government has combined planning policy guidance into one document- *Scottish Planning Policy- 2010*. The SPP is brief on retail planning issues, with the main emphasis on improving town centres, the sequential test and provision of a network of centres. The requirement to protect the vitality and viability of town centres remains central to government policy.

2.2.2 From the Council perspective, the requirements of the SPP support existing policies protecting established centres, but introduce a greater emphasis on defining the relationships between centres and their role and status. The 2012 Capacity Study assists by providing an updated assessment of the retail expenditure and turnover relationships within the Council area, together with the forecast capacity opportunities.

2.3 Dumfries & Galloway Structure Plan

2.3.1 The Structure Plan was adopted in 1999. It remains in force until it is replaced by the forthcoming new Local Development Plan.

2.3.2 In Table D5, the hierarchy of shopping centres is set out. Dumfries is the only regional centre. Stranraer, Castle Douglas, Newton Stewart and Annan are classified as district centres. The other small towns are defined as local centres.

2.3.3 Policy D14 directs new retail development to the town centres to support and enhance their role. Policy D15 seeks to protect the prime retail areas in Dumfries and Stranraer. Policy D16 promotes Dumfries as the focus for major new retail development proposals in the Council area.

2.3.4 Stranraer is much larger than the other district centres and Policy D17 designates it as the main centre serving the western part of the Council area. Policy D18 supports appropriate new retail proposals in the other district centres, where there is consistency with serving a district function. In a similar way, Policy D19 supports the local centres in their role. Policy D20 supports small shops in villages and neighbourhoods, subject to traffic and amenity considerations.

2.3.5 Policy D21 prescribes the sequential test for assessing new out of centre retail development proposals, together with a set of criteria than requires to be met. Policy D22 provides criteria for assessing new factory outlets tied to existing factory businesses and new factory outlet centres, which must demonstrate that they will not adversely affect comparison shopping in the town centres or tourist centres.

2.3.6 The 2012 Capacity Study provides an updated summary of the distribution of retail floorspace and forecasts of future potential capacity which will guide interpretation of the aging Structure Plan for development control purposes in its final period before replacement, along with the adopted Local Plans.

2.4 Local Plans

2.4.1 There are four Local Plans covering the Council area which were adopted in 2006. These include: Annandale & Eskdale LP; Nithsdale LP; Stewarty LP and Wigtown LP. Together with the Structure Plan, they will be replaced by the forthcoming Local Development Plan for the Council area.

2.4.2 Each of the Local Plans contains a set of common policies on retailing under General Policies 26-32.

2.4.3 General Policy 26 reflects the Structure Plan policies to protect the vitality and viability of the prime retail areas in Dumfries and Stranraer. General Policy 27 presumes against non- retail development in the prime frontages unless there is justification. General Policy 28 presumes in favour of retail development in the secondary retail areas of Dumfries and Stranraer, subject to meeting various criteria.

2.4.4 In the district and local centres, General Policy 29 presumes in favour of new retail development in the defined town centres, subject to meeting certain criteria. Edge of centre/ out of centre proposals will be subject to Structure Plan Policy D21 (sequential test). Under General Policy 30, non-retail development proposals in the defined town centres would be permitted, so long as the vitality and viability of the centres would not be threatened, together with meeting other criteria.

2.4.5 General Policy 31 supports new small supermarket proposals within, or adjacent to, the district and local town centres, including neighbourhood centres in Dumfries and Stranraer, provided the scale is appropriate to the role of the settlement or centre.

2.4.6 Support for additional small scale retailing in villages where there is no defined centre is given by General Policy 32, subject to scale and relevance to serving the local community.

2.5 Local development plan

2.5.1 The Main Issues Report (MIR) was published in March 2011. Following the representations received and the public consultations on site opportunities and proposed policies, the Proposed Local Development Plan is scheduled to emerge in November 2012.

2.5.2 In the MIR, there is a statement confirming the importance of town centres to the local economy and that changes in retailing, including out of centre developments and internet shopping, will influence the future of the established centres. It is proposed to review the existing town centre boundaries and review the current planning policies and opportunities. The MIR invited consideration of whether the list of towns with defined centres should be increased.

2.5.3 **Dumfries** is reconfirmed as the regional shopping centre in the MIR and its potential as the key to reducing comparison shopping expenditure leakage to competing centres outside Dumfries & Galloway. The MIR identifies the retail parks and other shopping centres in Dumfries itself, as part of the network of centres, with the town centre as the preferred location for new retail development. Within Dumfries, the network of centres in the MIR (pages 55/56) includes the town centre; Cuckoo Bridge and Dumfries Retail Parks as commercial centres for bulky goods sales; the Peel Centre as a local centre for the sale of convenience and comparison goods; and six identified neighbourhood centres in the town.

2.5.4 The MIR identifies the following main retail issues and opportunities facing Dumfries town centre:

- Lack of sites for large retailers;
- The opportunity for a major comparison retail development previously identified (13,700 sq m) is unlikely to be realised because of the economic climate;
- Need for public realm work to make the town centre more attractive;
- The extent to which out of centre retailing, such as at the Peel Centre, has affected trade in the town centre; and
- Need for the town centre to compete as a shopping destination.

2.5.5 In the MIR, the preferred approach is to continue to identify the town centre as the priority location for retail development. It also invites consideration whether non-bulky retailing should be promoted in out of centre commercial locations, including possible extension of the Peel Centre (with a view to strengthening Dumfries as a shopping destination).

2.5.6 **Stranraer** has been the subject of a Masterplan, following relocation of the Stena Line ferry to Cairnryan. This has created a waterfront development opportunity which the Masterplan seeks to link to the town centre. The retail element includes an opportunity for a supermarket and some additional comparison retail floorspace. Development of the waterfront is identified as a key regeneration project for the town (MIR main issue 7).

2.5.7 **Gretna/ Lockerbie/ Annan Corridor Regeneration Strategy** (MIR main issue 8) promotes a series of regeneration projects in this strategic area by the M74, including promotion of Gretna as a border gateway for business and tourism. In Annan, the potential to extend the defined town centre of Annan eastwards is an issue identified in the town Masterplan. In Lockerbie, there are opportunities to expand the housing land because of its accessibility by road and rail.

2.6 Focus of the Capacity Study 2012

2.6.1 The Retail Capacity Study provides information on the forecast retail capacity and retail market information to inform the emerging Local Development Plan, including reference to the issues raised in the MIR. Advice on the future distribution of capacity also recognises the hierarchy of centres in the existing development plan.

3 Town centres, supermarkets and retail parks

3.1 Introduction

3.1.1 This section provides a summary description of the main town centres and retail parks in Dumfries & Galloway, including commentary on the range and quality of retail offer.

3.2 Retail floorspace in the main towns

3.2.1 Table 3.1 shows the convenience and all comparison floorspace in each of the main towns. It reveals the dominance of Dumfries as the regional shopping centre for Dumfries & Galloway, with nearly 42,300 sq m gross of retail floorspace in the town centre and a total of just over 86,200 sq m gross in the town itself.

3.3 Dumfries

3.3.1 Dumfries benefits from an attractive environment and diversity of retail brands represented in the town centre. These include market staples such as Boots, Tesco, Clarks, Marks & Spencer, and Debenhams, as well as a wide range of independent retailers (including Barbours department store with concessions such as Joules and Hobbs); plus non-retail services including restaurants, cafes and financial and professional services.

3.3.2 The most recent Experian data (February 2011) reports a retail vacancy rate of 14% in the town centre. It has risen from 10% in 2005 and 13% in 2002, but lower than the 18% recorded in 1998.

3.3.3 The prime retail pitch in Dumfries town centre is the *High Street* and *Loreburn Shopping Centre*. Running off the High Street are Bank Street, English Street, Friars Vennel, St Andrew Street and Queensberry Street, which have traditionally been more service oriented, offering a mix of financial services, restaurants and cafes as well as independent shops.

3.3.4 There are some areas of tiredness and poor quality in the town centre which would benefit from investment. The Whitesands area offers potential for a major improvement to the edge of town, especially for visitors and the expenditure they bring.

3.3.5 **Retail parks**: details of the operators and unit sizes on the three retail parks in Dumfries are provided in Appendix 5, which include:

- **Cuckoo Bridge Retail Park-** located by the Glasgow Road roundabout on the A75. It is owned by British Land Shops and comprises 8 units totalling about 12,000 sq. m gross, of which three are vacant. Some vacancies have persisted. The Retail Park is restricted to bulky goods only, but there are no restrictions on developing mezzanine floors. Details of the restrictions at Cuckoo Bridge are also provided in Appendix 5.
- **Dumfries Retail Park-** comprises some 8,000 sq. m. of restricted Open Class 1 retail warehousing (bulky goods) in an L-shaped terrace of 5 units along with two stand-alone units. Two units are vacant. The retail park is located on College Mains Road about half a mile north-west of the town centre at the Kilmarnock roundabout. It should be noted that there is a Certificate of Lawful Use (dated March 2012) which allows the units to be used as a food supermarket.
- **The Peel Centre** is located on Lockerbie Road, in a fringe location on the A709 at the eastern boundary of the town. It comprises five operational units totalling 6,681 sq. m, following the recent closure of JJB Sports (929 sq m). There is also consent for a small, stand-alone unit of 288 sq m which has not been developed. (see Appendix 5). The tenants are Class 1 non-food retailers and there are no bulky goods retailers. An application to extend the Peel Centre has been withdrawn.

3.3.6 Dumfries is also the main convenience shopping centre in the Council area, with two Tesco superstores and a Morrisons supermarket, plus Lidl and Aldi. Therefore the choice of main supermarket operators in Dumfries is limited for a town of this size.

3.4 Stranraer

3.4.1 Stranraer is a market town with the majority of shops located on Charlotte Street, George Street, Castle Street and Bridge Street. The town has some major multiples – New Look, Tesco Metro, Morrisons, Boots, Farmfoods, Semi-Chem and M & Co, but it is predominantly served by independent retailers.

3.4.2 There is a small retail park of three units totalling 1,325 sq. m. located on Bellevilla Road. Occupiers are Argos, New Look and 02.

3.4.3 The most recent Experian data (April 2011) reports a low retail vacancy rate of 8% in Stranraer town centre.

3.4.4 Convenience retailing in Stranraer is mainly provided by a Morrisons supermarket, Tesco Metro and Lidl.

3.5 Other small towns

3.5.1 Among the towns in Table 3.1, the district centres of Annan, Castle Douglas and Newton Stewart are each served by a mainstream supermarket operator, although the Sainsbury's in Newton Stewart is very small. The relatively new Tesco in Annan will have reduced the expenditure leakage to Carlisle.

3.5.2 In Annan, the retail offer is mainly small independent operators and there is potential to attract more visitor expenditure to its historic centre and cafes. Castle Douglas has a good range and quality of shops. The town is a popular destination for locals and visitors. In Newton Stewart, the retail offer is rather limited, although it has a Sainsbury's.

Table 3.1
Dumfries & Galloway *main towns- retail floorspace summary 2012

	floorspace sq m gross	
Dumfries main catchment area	convenience	**all comparison
Dumfries-total	21,752	64,455
Retail parks		21,642
Town centre	4,576	37,714
Lockerbie-total	3,944	2,324
Town centre	489	1,460
Moffat-total	2,023	1,914
Town centre	823	1,914
Annan-total	5,993	4,912
Town centre	2,309	4,066
Castle Douglas-total	6,731	8,720
Town centre	1,811	8,440
Kirkcubright-total	2,048	2,197
Town centre	998	2,197
Stranraer main catchment area		
Stranraer-total	10,101	12,804
Town centre	7,267	12,210
Newton Stewart-total	3,902	2,648
Town centre	1,427	2,648

Note: * Main tow ns as defined in the study brief
** refers to all comparison goods, including bulky goods in this table- for simplicity. See sections 5 and 7 for split
The figures in this table incorporate the split of convenience and comparison floorspace in supermarkets
Sources: as for Tables 5.4 & 5.5 & 7.6 & 7.7

3.5.3 The local centre of Lockerbie has a Tesco supermarket and a limited amount of comparison retailing serving the local residents. Moffat is a small town which attracts significant numbers of visitors because of its location. As a consequence, there is a fair level of comparison shops. The convenience offer is limited, but it has a Co-op. Kirkcubright is an attractive harbour town with an affluent population and good quality retailing for its size. It is an attractive place for visitors. The main food store is a Tesco Metro.

3.5.4 Taking an overview of the small towns in Table 3.1, the main issue is probably the need to maintain and improve the quality of retail offer- both for locals and visitors. This could involve, for example, more themed attractions, specialist produce etc, combined with good cafes and restaurants in attractive streetscapes.

3.6 Gretna Gateway Outlet Centre

3.6.1 At the eastern edge of the Dumfries catchment area is the Gretna Gateway Outlet Centre. It is located just off the A74 on the outskirts of Gretna. It has 50 outlet stores including Clarks, Gap, Marks & Spencer, Nike, Antler, Berghaus and Sports Direct, with a new Puma store due to open in September 2012. The most recent Experian data (March 2011) reports a vacancy rate of only 7%. Planning consent for a supermarket at Gretna has recently been renewed- see section 5.7.

3.6.2 This development is an important herald to visitors from England and it has remained reasonably successful in the current economic climate, judging by the low vacancy rate and continuing tenant demand.

3.7 Distribution of retail floorspace in Dumfries & Galloway

3.7.1 The current distribution of retail floorspace is indicated in Table 3.1 and in more detail in Tables 5.4 and 5.5 for convenience floorspace and in Tables 7.6 and 7.7 for bulk goods and other comparison floorspace.

3.7.2 For convenience retailing, the distribution appears good in terms of serving the towns. Almost all have a mainstream supermarket representation. In Dumfries, the limited choice of main operators suggests that it should be the location for any further significant supermarket development opportunity that can be supported by expenditure capacity and planning policies.

3.7.3 Development of supermarkets in Dumfries & Galloway in recent years, together with the recent consent in Gretna, suggest that there is little scope for reducing the existing, low level of convenience expenditure leakage from the Council area.

3.7.4 For bulky goods and other comparison retailing, Dumfries also represents the main opportunity for additional provision. Improvements to the existing range, quality and choice will be important to sustain Dumfries' role as the regional centre. There is unlikely to be much requirement for significant additional comparison floorspace in the other towns.

4 Retail trends and market demand in Dumfries & Galloway

4.1 Introduction

4.1.1 This section contains a review of retail market trends and an appraisal of the current retail property market in Dumfries & Galloway.

4.2 Per capita retail spend

4.2.1 The latest UK forecasts of retail expenditure per capita by Oxford Economics (for Pitney Bowes) show convenience expenditure growth of only 0.3% per annum over the next ten years. For comparison expenditure, the forecast growth rate is 4.2% per annum over the same period. These are lower than previous forecasts.

4.2.2 On a year to year basis, convenience expenditure per capita has actually declined since 2008. Comparison expenditure per capita has varied between minus 2.5% to plus 2.6% i.e. much lower than Oxford Economics' ten year forecast. A view is taken on these forecasts in the relevant sections later in this report. For comparison expenditure, the main issue is whether the current period of austerity will continue for years, or will the growth rate revert back to longer term past trends.

4.3 Internet retail expenditure

4.3.1 Internet spending is a fast growing element of retail expenditure. It reduces the expenditure available to service conventional shop floorspace. This is much less relevant to convenience spending than for comparison spending, because the items are largely picked off the supermarket shelves. For comparison retailing, Oxford Economics forecast that the proportion of online sales could rise from about 13% currently, to nearly 15% by 2021, under their central case estimate, or by around 18% under their high forecast. Either way, there will be a tapering-off of growth as the level of computer access matures.

4.4 General retail market trends

4.4.1 Currently, consumer expenditure is faltering as high price inflation and low wage growth are compounded by weak employment growth and an overhang of personal debt. The prospect of unemployment reducing in 2012/13 and inflation easing may make households slightly better-off, but retail expenditure is likely to still remain subdued.

4.4.2 In response to this position and shopping destinations favouring larger destinations, the retail market is polarising between prime locations and weaker locations. It is also polarising between staple goods (food and groceries) and discretionary goods and services (comparison and leisure).

4.5 Comparison retailing

4.5.1 Retailer demand for new shop units has fallen dramatically since the boom years of the early 2000s. Aside from selected city blocks and shopping centres in Glasgow and Edinburgh, and supermarkets, new development has stopped. Development challenges caused by weak retailer demand are exacerbated by the bank funding crisis and risk aversion in relation to the property market.

4.5.2 Many high profile retailers have closed (Woolworths, Ethel Austin, Adams) or are consolidating (Arcadia brands, Thorntons, Mothercare). Leisure outlets such as cafes, restaurants, bars and hotels remain active, but service outlets such as banks and travel agents are expected to be lost as their customers migrate online.

4.5.3 In locations where service outlets are being lost and major retailers are contracting, vacancies have arisen. However, major shopping destinations are trading well, as retailers concentrate on operating larger outlets in these destination centres, rather than sustaining large branch networks.

4.5.4 Many retailers took units in shopping centres and retail parks built during the late 1990s and early 2000s, such as Buchanan Galleries and Silverburn in Glasgow, Ocean Terminal in Edinburgh and the Overgate Centre in Dundee, which are now among their premier sites in Scotland.

4.5.5 In the comparison retail sector, companies such as H&M (clothing) have continued to invest in stores and budget operators, such as Primark, have performed well. Fairly recent arrivals in Scotland include B&M (budget mixed goods stores). Many other companies have faced considerable difficulties in the market, such as the slide of JJB Sports for example.

4.6 Bulky goods retailing

4.6.1 The bulky goods sector has been severely affected by the economic climate, including reduced disposable household incomes and the difficult housing market.

4.6.2 In the electrical/computing sector, Dixons remains the market leader, but there has been extensive shake-up among other operators, such as the demise of Comet. There is too much floorspace relative to spending and online sales are adding to the problem. The carpets and furniture sector is under pressure with store closures by United Carpets. The DIY sector remains weak, but not gardening.

4.7 Convenience retailing

4.7.1 Continuing demand for groceries has encouraged the mainstream supermarket operators to continue with their expansion plans and also capture an increasing share of comparison shopping. Food sales from the supermarket operators have also benefited at the expense of restaurants, with more people dining at home.

4.7.2 While the major chains remain active in seeking new sites, there is a shift away from major new hypermarket-style formats, such as Tesco Extra and Asda Walmart, towards smaller convenience stores, such as Tesco Metro and Sainsbury's Local. There is a general interest in developing small supermarket units to serve local/ neighbourhood areas- and also small towns. For example Tesco has a current application to develop a supermarket of just over 1,300 sq m in Maybole, South Ayrshire.

4.7.3 Grocery shopping customers do not now want an overwhelmingly large unit selling everything, with online shopping often proving more attractive for comparison goods.

4.7.4 This has implications for urban expansion and regeneration projects, as superstores often bring an early and high value land use to help fund infrastructure and less viable land uses. Some market interest in developing mid-size supermarkets in the range 3,000-5,000 sq m gross remains. Typically, it would occur where an operator wants representation in competition with established rivals, or where there is no/ inadequate supermarket provision.

4.7.5 Development progress has slowed considerably though, compared to the past. There is also continuing market interest by brand operators, such as M&S Simply Food, and the upmarket supermarket operator, Waitrose, in selected locations.

4.7.6 On supermarket formats, the proportions of convenience/ comparison floorspace tend to be related to scale of the unit, with proportionally more comparison floorspace in larger units. For major superstores of, say, 7,500 sq m gross upwards, the proportion of comparison floorspace can be around 40% or more for the very largest stores.

4.7.7 For mid-size supermarkets (3,000-5,000 sq m), the operators may seek 25% or even 30% of the floorspace for non-food sales. Operator formats can vary widely and in practice, the operators can be flexible regarding the split of floorspace, depending on the local circumstances. For small supermarkets, the proportion of comparison floorspace is often much lower.

4.7.8 In general, the higher the proportion of non-food sales floorspace in supermarkets, the greater the risk of higher trade diversion from town centres, depending on the local circumstances.

4.8 Neighbourhood centres

4.8.1 There is evidence of continuing market interest in creating new neighbourhood centres in other local authority areas, particularly where there is planned housing expansion. Proposals are commonly developer-led and speculative, sometimes in association with opportunities identified in local plans.

4.8.2 Neighbourhood centres typically comprise a group of shops anchored by a small supermarket, which serve an immediate residential area. The main catchment may be the population within about five minutes' walking time.

4.8.3 It could for example, comprise a development of a supermarket of around 300-500 sq m gross, plus perhaps, three small shop units of 40-100 sq m gross each, which are likely to be mainly occupied by non- retail services. Location on a main through road will be an important consideration for prospective operators of the supermarket. Proposed schemes vary in size.

4.8.4 In practice, proposals can appear which contain supermarkets that are much larger than indicated here. In these cases, local authorities have to take a view on what they consider to be a neighbourhood within the hierarchy of centres. Authorities also need to take a view on whether a proposed new neighbourhood centre is appropriate. Some schemes simply 'pop up'.

4.9 Implications of the general trends

4.9.1 The implications of these national trends for the supply of new retail floorspace over the next few years are:

- Continuing development of supermarkets, but mainly smaller units and slow rates of post consent development. This indicates less scope for supermarket development as a generator of funding for wider development/ regeneration, compared to the past;
- Extremely limited development interest in new shopping centres/ town centre schemes;
- Muted demand for modern units on an individual basis because of the economic climate- pre-lets, not speculative;
- Little market interest in the development of new retail parks, with most interest in rationalising existing units (mezzanines/ reconfigurations etc, together with some retail park extensions;
- Some interest by non-bulky goods retailers in retail parks, especially where large space is not available in the town centres, and
- Some potential for increased small unit, niche, visitor orientated retailing in the towns, but not further 'House of Bruar' style of out of centre schemes.

4.10 Dumfries retail market

4.10.1 Dumfries performs reasonably well as a retail location. The picture is not however one of unchallenged growth and significant re-pricing of retail property has been required and vacancies have increased.

4.10.2 Extensive out of town retail development around Dumfries over the past 10-15 years does not appear to have undermined the town centre. Instead, it has allowed the town to serve a captive regional catchment and defend against the attractions of Carlisle, Glasgow and Edinburgh.

4.10.3 Looking to the future though, the balance of out of centre/ town centre comparison retailing is a matter of degree in terms of complementing, or competing with, the town centre.

4.10.4 If too much out of centre space is made available for comparison retailing, there is a risk that some retailers would relocate from the town centre, rather than just attract new retailers to Dumfries. Given that the need to accommodate larger space users in Dumfries has been identified by the Council, some further out of centre provision appears reasonable, subject to qualification. The issue is addressed in the recommendations at the end of the study.

4.10.5 For bulky goods, Dumfries & Galloway has rather limited floorspace compared to some Council areas elsewhere, with broadly similar populations. Examples include Stirling and the Dunfermline catchment in Fife. Even so, there is interest by the owners of the retail parks in Dumfries to convert vacant bulky goods units to general Class 1Use to secure tenants.

4.10.6 On convenience retailing, there is a current PAN to develop a supermarket of some 3,700 sq m at Brasswell Park, with ASDA reported as the proposed operator. This appears as a rival site to the current application at Craigsview Caravan Park for a 4,924 sq m supermarket, which is under appeal following refusal by the Council in February.

4.11 Retail properties on the market

4.11.1 There are currently 39 retail properties on the market in Dumfries, totalling 13,075 sq. m, both in the town centre and outside. These are retail properties which are being actively marketed, excluding other vacancies and non-retail vacancies. The marketed retail properties have increased from 14 units in 2005.

4.12 Stranraer market

4.12.1 Stranraer has five retail units totalling 889 sq. m. on the market. Among the smaller towns, 30 retail units are being marketed.

4.12.2 The Council report potential market interest among the main operators for the supermarket opportunity identified in the Masterplan for the Stranraer waterfront. However, nothing is confirmed. The scale needs to be large enough to compete with the existing supermarkets and claw back leakage, while not threatening the town centre. Also, there may be opportunities for visitor related retailing associated with the proposed redevelopment.

4.13 Retailer openings and closures

4.13.1 Table 4.1 identifies notable recent openings and closures of retail outlets in Dumfries and Galloway. In common with other towns, Dumfries town centre may be losing some multiple retailers, but it is also having notable success in replacing these; chiefly Debenhams. Closures such as Clinton Cards, Game, Peacocks, JJB Sports and Woolworths are not specific to Dumfries & Galloway but are national retailer failures affecting many locations.

4.13.2 The most active markets since 2010 have been Dumfries and Stranraer. Recent new tenancies in the Gretna Outlet Centre indicate its success.

Table 4.1
Retailer market activity in Dumfries & Galloway- openings and closures

Town	Location	Retailer	Date
Openings			
Dumfries	High Street	Debenhams	May-12
		Iceland Foods	Nov-10
		HSBC	Jul-12
Dumfries	Loreburn Centre	Sports Direct	Spring 2012
		Card Factory (expansion)	Spring 2012
Gretna	Gretna Gateway Outlet Village	Clarks	Jul-12
		Berghaus	Jul-12
		Body Shop	Spring 2012
		Pagazzi	Spring 2012
		Nike	2010
		Gap	2009
		Puma	Due to open late 2012
Annan	Scott's Street	Tesco	Dec-09
Closures			
Dumfries	High Street	TJ Hughes (now Debenhams)	Aug-11
		Woolworths (now Iceland Foods)	Jan-09
Dumfries	Loreburn Centre	Peacocks (now Sports Direct)	Jan-12
		Clinton Cards	Jul-12
Dumfries	Peel Centre	JJB Sports	2012
Gretna	Gretna Gateway Outlet Village	Game	Apr-12
Stranraer	George Street	Clinton Cards	Jul-12

Source:
Research by Ryden

4.14 Investment transactions

4.14.1 Investment transactions provide an indicator of property market interest and confidence. Following the property market crash, only three investment transactions have been recorded in the region since 2010. These are shown in Table 4.2. In addition the Southergate Centre on Dumfries High Street, (12 prime retail units and nightclub totalling 7,335 sq. m. and 185 space multi-storey car park) is for sale at offers in region of £10,150,000 reflecting a net initial yield of 7.5%. It is currently under offer.

Table 4.2
Dumfries & Galloway investment transactions

Address	Details
78-80 Glasgow Road Dumfries	Retail unit totalling 770 sq.m. sold as part of a portfolio
184-186 King Street, Castle Douglas	Café, sold at auction
High Street, Langholm	Retail unit totalling 107 sq.m. sold for £90,000 (net initial yield of 9.7%) Let to Edinburgh Woollen Mill Ltd, expiring 8 December 2015. Currenly passing £9,000 pa

Source:
Research by Ryden

4.15 Retailer requirements-trends in market demand

4.15.1 Retailer requirements to locate in towns and commercial centres provide an important indicator of market demand. Since the market downturn in 2008 however, many retailers are no longer actively seeking new premises, or are being extremely selective. The retailer requirements to locate in Dumfries & Galloway area indicated in Table 4.3, by type.

4.15.2 Where retailers are looking for premises, many simply have blanket requirements covering whole regions rather than specific requirements for named centres. So the figures in Table 4.3 should be treated with caution.

4.15.3 According to one data source which tracks requirements over time (Costar), retail requirements for Dumfries have fallen over the past decade, as they have for many locations. Figure 4.1 depicts requirements falling from twenty-four in 2002 to only six in 2012.

4.15.4 Reviewing the current requirements compared to the situation in 2006: East now has a concession within the Barbour department store; Gamestation was acquired by Game which has a store at 175 High Street but is now in administration; while Card Warehouse, Heron Frozen Foods, GNC Health Shops, Burger King and Pizza Hut were all active in 2006 but are now absent from the requirements list.

4.15.5 A panel of data [1]sources used for this study records a total of 10 different retail requirements throughout Dumfries & Galloway totalling between some 3,100 – 5,100 sq. m. Table 4.3 shows these requirements, plus some service requirements. It does not include the ASDA interest.

4.15.6 Nine of the retailers specifically state Dumfries as the requirement. One states Stranraer, and one states Annan, while four have a region-wide [2]requirement.

4.15.7 Contact was made with some of the retailers, which indicated a mix of strong and weak requirements in relation to Dumfries & Galloway, which is normal for this type of list.

[1] Costar, SPN, RGi, Ryden

[2] Some retailers have more than one requirement

Figure 4.1 Retailer requirements in Dumfries & Galloway

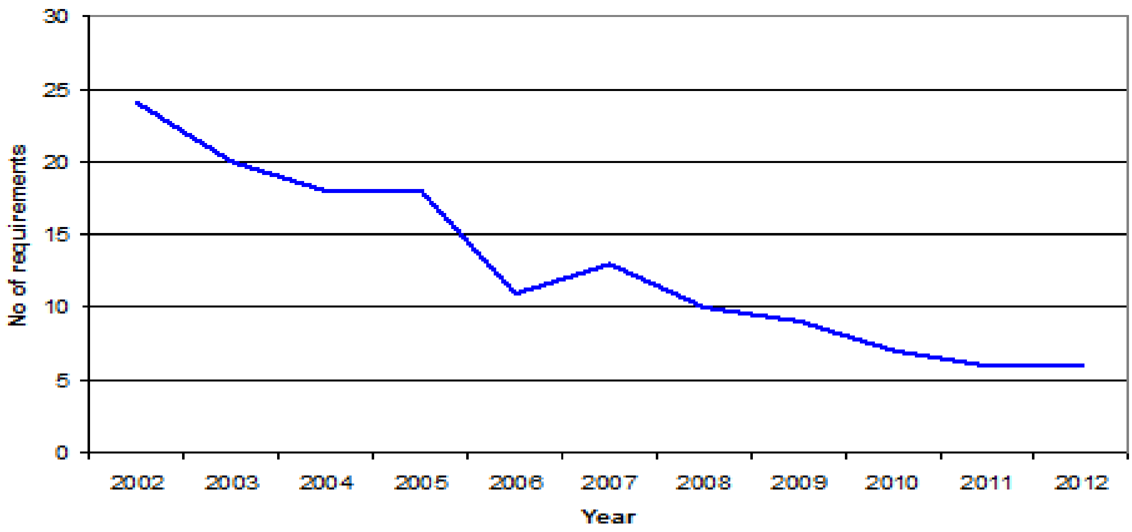


Table 4.3
Dumfries & Galloway retailer requirements by sector

Sector	No of reqs requirements	Size of requirement sq m	Town	Pitch
Food & drink (convenience)	2	511-929	Dumfries & Galloway	Edge of town / in town
Clothing (comparison)	2	1,069 – 1,672	Dumfries, Annan	In town / shopping centre, edge of town/ out of town
Books / video / music (comparison)	1	74 – 279	Dumfries	Town centre
Household goods (bulky & comparison)	4	1,417 – 1,950	Dumfries, Stranraer & Council area	In town / shopping centre, edge of town/ out of town
Pharmacy, health & beauty (comparison)	1	70 – 232	Dumfries	Town centre
Total retail	**10**	**3,141- 5,062**		
Restaurants / café/ bars	3	3,679 – 3,735	Dumfries, Stranraer & Council area	In town / shopping centre, edge of town/ out of town

Sources: Ryden, Costar, EGi,SPN

4.16 Zone A retail rents

4.16.1 Prime retail rents in Dumfries town centre increased from £52 per sq.ft in 2000 to £60 per sq. ft. in 2006, as shown in the table below. Rents fell to £55 in 2007 and again to £45 per sq ft in 2009. While this 25% decline in nominal rents indicates a weaker market, lower rents have helped Dumfries town centre to become more attractive for retailers to invest in, as evidenced by the recorded deals.

4.16.2 Current asking rents in Dumfries range from £3.75 per sq. ft for a large store on Church Crescent to £73 per sq.ft. for a unit (well above Zone A rents in the town centre) in the Loreburn Shopping Centre. Asking rents for retail units on the High Street ranging from £12 to £52 per sq. ft., with an average asking rent of £23 per sq. ft. Recent deals suggest rents actually being achieved stand somewhat lower, at between £7 per sq. ft. and £38 per sq.ft.

4.16.3 In Stranraer current asking rents range from £11 per sq.ft. up to £25 per sq. ft. Recent deals suggest rents achieved stand at between £8.25 per sq. ft. and £10.60 per sq.ft.

Year	Zone A rent £ per sq.ft.
2000	52
2001	55
2002	55
2003	55
2004	60
2005	60
2006	60
2007	55
2008	55
2009	45
2010	45
2011	45
2012	*to be confirmed*
Source: Costar	

4.17 Summary

4.17.1 The general retail market trends set out as bullet points earlier in this section all apply to Dumfries & Galloway. There is market interest in development of additional convenience floorspace in Dumfries, and potential market interest in the Stranraer supermarket opportunity. Under the current economic circumstances, the prospect is one of limited development of new comparison retail floorspace over the next few years, accompanied by rationalisation of existing properties.

4.17.2 Competition between the retailers is very strong, as evidenced by the demise of some major names and branch closures. On the positive side, Dumfries has held up quite well, and has adapted to the market conditions in terms of rentals. Also, the rather isolated location of Dumfries & Galloway will be assisting the existing retailers, as the alternative for shoppers is to travel long distances.

5 Convenience expenditure and turnover

5.1 Introduction

5.1.1 This section shows the relationship between convenience expenditure and turnover in the catchment areas of Dumfries and Stranraer, and for the Council area as a whole, taking account of the shopping patterns. Thus, the total turnover in each catchment area derives from the residents' expenditure potential, plus inflows, less outflows.

5.1.2 The distribution of the turnover among the various centres and supermarkets is then controlled to the total deduced turnover for each catchment area from the shopping patterns.

5.2 Convenience goods-definition

5.2.1 Convenience goods include:

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

5.2.2 This definition is provided in Pitney Bowes' *Retail Expenditure Guide 2011-12*, based on Central Government survey classifications. It is consistent with the definition in the 2006 Retail Capacity Study.

5.3 Convenience expenditure potential

5.3.1 Retail expenditure per capita data for Dumfries & Galloway was acquired from the Pitney Bowes' *AnySite* report commissioned for this study. The AnySite report contains specific forecasts of the expenditure per capita for the Council area, which takes account of local socio economic characteristics.

5.3.2 The convenience expenditure per capita data is shown in Table 5.1, which reveals minimal forecast growth at nearly 0.3% per annum for 2012-22. It is similar to the forecast rate for the [3]UK. Special forms of retailing, including internet spending, have been deducted, as explained in the footnote to the table.

5.3.3 Table 5.2 shows the expenditure potential of the residents of the Dumfries and Stranraer main catchment areas, and for the Council area, up to 2022. The forecast growth is about £4 million for the Dumfries catchment and about £1 million for the Stranraer catchment over the next ten years.

5.4 Expenditure patterns

5.4.1 There is no updated survey of shopping patterns in this report. However, assessment of the convenience shopping patterns has been re-worked directly from the NEMS household interview survey tabulations for the 2006 study, based on main food and top up shopping patterns, as explained in Appendix 2. This exercise was not undertaken in the 2006 Retail Capacity Study.

5.4.2 Questions 5 and 9 from the NEMS survey underpin our analysis and are reproduced in Appendix 2. These cover main food and top up shopping patterns, identifying specific stores and centres in detail. The responses are combined and weighted for main food shopping/ top up shopping on a ratio of 80:20 to represent patterns for all convenience expenditure. The approach is orthodox for retail capacity studies generally.

5.4.3 Since 2006, new Tesco supermarkets have been developed at Lockerbie Road, Dumfries and at Watchall, Annan. The latter will have reduced food spending by Annan residents in the Carlisle supermarkets. Therefore a slight modification to the patterns based on the NEMS survey has been included in Appendix 2.

5.4.4 Allowance for visitor spending on convenience goods has not been included, because it is likely to be relatively small. It has been included for comparison goods though.

[3] (Pitney Bowes *Retail Expenditure Guide 2011-12 (November 2011 Update)- forecasts by Oxford Economics*.

Table 5.1
Dumfries & Galloway convenience expenditure per capita per annum, *excluding special forms of retailing (in 2010 prices)*

	2010 £	2012 £	**2016** £	2017 £	**2021** £	2022 £
Dumfries & Galloway	1,940	1,960	2,002	2,004	2,012	2,014
excluding special forms of retailing		*1,939*	*1,980*	*1,982*	*1,990*	*1,992*

Source:
Pitney Bowes AnySite report for Dumfries & Galloway, commissioned for this study. The dates in bold are those for which forecast expenditure per capita is provided in the AnySite report. The others are interpolations and an extrapolation for 2022.
The forecasts are provided by Oxford Economics for Pitney Bowes reports. There is minimal growth from 2012-22 (0.27% per annum for the study area. Note that the forecast growth rates in this table also relate to the local socio economic profile.
Special forms of retailing include mail order and internet sales, which require to be deducted so that the expenditure relates to conventional retail floorspace. An estimate of 1.1% for special forms of retailing is provided in Pitney Bowes Retail Expenditure Guide 2011, November 2011 Update. Note that this low proportion does not include internet based home delivery services, because most is picked off supermarket shelves.

Table 5.2
Dumfries and Stranraer main retail catchment areas: convenience expenditure potential of the residents (in 2010 prices)

	2012 £million	2017 £million	2022 £million
Dumfries main catchment	230.1	234.5	234.2
Stranraer main catchment	57.4	58.5	58.5
Dumfries & Galloway	**287.5**	**293.0**	**292.7**

Note
From Tables 1.1 and 5.2. Excludes special forms of retailing

Table 5.3
Dumfries & Galloway convenience expenditure patterns (in 2010 prices)

	%	2012 £million	2017 £million	2022 £million
Dumfries catchment residents' expenditure potential		230.1	234.5	234.2
Add: inflows	2%	4.6	4.7	4.7
Less: outflows	-4%	-9.2	-9.4	-9.4
Retained expenditure (turnover)		**225.5**	**229.8**	**229.5**
Stranraer catchment residents' expenditure potential		57.4	58.5	58.5
Add: inflows	0%	0	0	0
Less: outflows	-8%	-4.6	-4.7	-4.7
Retained expenditure (turnover)		**52.8**	**53.9**	**53.8**
Dumfries & Galloway residents' expenditure potential		287.5	293.0	292.7
Add: inflows	0%	0	0	0
Less: outflows	-3%	-9.2	-9.4	-9.4
Retained expenditure (turnover)		**278.3**	**283.6**	**283.3**

Note:
From Table 5.2 and Appendix 2, based on 2006 NEMS household survey,modified to allow for the development of supermarkets in Dumfries and Annan, after 2006. Figures and percentages shown rounded.

5.4.5 Table 5.3 shows the convenience expenditure patterns for the Dumfries and Stranraer main catchment areas. These refer to the inflows and outflows of expenditure, expressed as a percentage of the catchment area residents' expenditure potential.

5.4.6 For the Dumfries catchment, there is a small inflow (2%) of expenditure from the Stranraer area. The catchment outflows are low at 4%. For the Stranraer catchment, the recorded inflows are negligible and the catchment outflow is moderately low at 8% of which virtually all goes to the Dumfries catchment. Therefore both catchment areas appear quite self-contained for convenience shopping.

5.5 Expenditure leakage from the Council area

5.5.1 Outflows from Dumfries & Galloway as a whole, are only 3%, which reveals a high level of self-sufficiency- see Table 5.3. However, the leakage was higher in 2006 and this update has allowed for a 5% reduction in leakage from the Dumfries catchment following development of the Tesco supermarket in Annan, where many residents visited Carlisle for food shopping in 2006.

5.5.2 However, supermarket provision in Carlisle has improved with the opening of Sainsbury's and consents for other supermarket sites. So the current level of leakage from Dumfries & Galloway could rise in the future, but this could be offset by the recent supermarket consent at Gretna, if it is developed.

5.5.3 The 2006 Capacity Study estimated that convenience expenditure leakage from the Council area was 11% in the footnote page 43 of the Study. This appears to be based on the responses to Question 11C of the NEMS survey, which asked respondents what percentage of their total spending on food and groceries was done outside Dumfries & Galloway. The question was very broad and it is no surprise that the outcome was inconsistent with the identification of specific shopping destinations by the same respondents in their responses to questions 5 and 9.

5.6 Convenience floorspace and turnover in 2012

5.6.1 The current distribution of convenience retail floorspace in the Dumfries and Stranraer main catchment areas is shown in Tables 5.4 and 5.5 respectively.

5.6.2 The floorspace information has been comprehensively updated. For Dumfries and Stranraer town centres, plus the Gretna Outlet Centre, the floorspace derives from the latest Goad information. For the other towns, the floorspace information is based on the Council's own data, which incorporates occupancy updates from their street surveys in 2011.

5.6.3 Tables 5.4 and 5.5 show the convenience turnover at average levels, based on the Retail Rankings 2012 for the supermarkets. More detail is provided in the footnotes to the tables. The totals at average levels are controlled to the expenditure based totals in each table, to reveal any over-trading or under-trading against average levels.

5.6.4 Evidence from the tables indicates that the Dumfries main catchment is trading at close to average levels, with slight over-trading of 3% overall. Under-trading of 15% overall is indicated in the Stranraer catchment.

5.6.5 The main changes since 2006 are development of the Tesco supermarkets at Lockerbie Road, Dumfries and at Watchhall, Annan, as mentioned earlier in this section.

5.7 Planning commitments

5.7.1 There is a recent consent for a 4,180 sq m gross supermarket at Gretna- Old Toll Bar (12/P/4/0090). The consent was granted in August 2012, and it is a renewal of a previous consent. Among the conditions is that no more than 25% of the net floorspace can be devoted to comparison sales.

5.7.2 The convenience turnover of this consent could be around £21.2 million, assuming a net/gross floorspace ratio of 60%, with 75% convenience floorspace and an average turnover ratio of [4]£11,264 per sq m. Given its location by the Outlet Centre, about 50% of the turnover could be associated with visitors to the Centre, particularly as the local population is not large. This leaves £10.6 million turnover associated with residents of Dumfries & Galloway; from locals and clawback of leakage. There will be limited attraction from Annan, with the recent Tesco in place.

5.7.3 There are two current supermarket site proposals in Dumfries, as described in section 4.

[4] Average of the 'big' four supermarket operators from the Retail Rankings 2012.

Table 5.4
Dumfries main catchment area: convenience floorspace and turnover at average levels (in 2010 prices)

	Floorspace sq m		Average turnover levels	Turnover
	gross	net	£ per sq m	£million
Dumfries town centre				
*Town centre shops, incl part M&S	4,576	3,203	4,500	14.4
Other Dumfries shops				
Tesco, Lockerbie Rd (5,560 sq m gross 75% conv)	4,170	2,711	10,407	28.2
Morrisons, Brooms Rd- extended: (3,757sqm gross-90% conv)	3,381	1,860	12,220	22.7
Aldi, Annan Rd -extended: (1,511 sq m gross- 85% conv)	1,284	899	3,346	3.0
Lidl, Brooms Rd (1,700 sq m gross-85% conv)	1,445	1,012	3,346	3.4
Tesco, Cuckoo Bridge (8,147 sq m gross-65% conv)	5,296	3,624	10,407	37.7
**Tesco, Heathhall Esso Express	300	210	15,544	3.3
**Co-op, Troqueer Rd	400	240	6,000	1.4
**3 Spars- (Rosevale St, Georgetown & Lochabriggs)	900	540	2,800	1.5
Sub total- all Dumfries shops	21,752	14,298		115.7
Lockerbie				
Town centre shops	489	293	2,800	0.8
Tesco, Goods Station Rd (4,319 sq m gross-80% conv)	3,455	2,073	10,407	21.6
Moffat				
Town centre shops	823	494	2,800	1.4
***Co-op, Holme St	1,200	720	6,000	4.3
Annan				
Town centre shops	2,309	1,385	2,800	3.9
Tesco, Watchhall (4,230 sq m gross-80% conv)	3,384	2,030	10,407	21.1
**Spar, Eastriggs	300	180	2,800	0.5
Gretna				
Town centre shops	855	513	2,800	1.4
*Outlet Centre	870	609	3,500	2.1
Langholm				
Town centre shops	768	461	2,800	1.3
***Co-op, Glenesk Rd	1,160	696	6,000	4.2
Sanquhar	1,207	724	2,800	2.0
Thornhill	442	265	2,800	0.7
Castle Douglas				
Town centre shops	1,811	1,087	3,500	3.8
***Co-op, Cotton St	2,400	1,440	6,000	8.6
***Tesco, Ernespie Rd (2,800 sq m gross-90% conv)	2,520	1,512	10,407	15.7
Dalbeattie	1,092	655	2,800	1.8
Kirkcudbright				
Town centre shops	998	599	3,500	2.1
***Tesco Metro, St Cuthbert's St	750	525	10,407	5.5
Spar, Gatehouse of Fleet	300	180	2,800	0.5
Total Dumfries catchment area	48,885	30,740		219.2
Over trading above average levels			3%	*6.3*
Total turnover at actual levels				**225.5**

Note
Gross floorspace data provided by the Council, except where shown, including the latest street survey occupancy updates.
* Floorspace based on latest Goad. ** R MacLean estimate of floorspace. *** Floorspace based on Google Earth measurment tool.
For the Goad based floorspace in Dumfries and Stranraer, a high net/gross ratio of 70% is applied, to offset the fact that Goad mainly records the unit footprint and may understate the total where there are upper floors.
The turnover ratios for the supermarkets and M&S derive from the Retail Rankings 2012, adjusted to remover petrol sales with an allowance for VAT added. For all other floorspace, the turnover ratios are estimates based on studies elsewhere.

Table 5.5
Stranraer main catchment area: convenience floorspace and turnover at average levels (in 2010 prices)

	Floorspace sq m		Average turnover levels	Turnover
	gross	net	£ per sq m	£million
Stranraer town centre				
*Tesco Metro	1,620	1,134	10,407	11.8
Morrisons (3,586 sq m gross-90% conv)	3,227	1,775	12,220	21.7
*Other town centre shops	2,420	1,694	4,000	6.8
Sub total town centre	7,267	4,603		40.3
Other Stranraer shops				
Lidl	1,934	1,354	3,346	4.5
**3 Spars-(Kirsland Rd, Mirrey's Garage, Castle Kennedy)	900	540	2,800	1.5
Sub total- all Stranraer shops	10,101	6,497		46.3
Newton Stewart				
Town centre shops	1,427	856	3,500	3.0
Sainsbury's	1,140	728	10,660	7.8
Aldi (1,570 sq m gross-85% conv)	1,335	956	3,346	3.2
Whithorn	274	164	2,800	0.5
Wigtown				
**Co-op	300	180	6,000	1.1
**Other shops	300	180	2,800	0.5
Total Stranraer catchment area	14,877	9,562		62.3
Under trading below average levels			-15%	*-9.5*
Total turnover at actual levels				**52.8**

Note
Gross floorspace data provided by the Council, except where shown, including the latest street survey occupancy updates.
* Floorspace based on latest Goad. ** R MacLean estimate of floorspace.
For the Goad based floorspace in Dumfries and Stranraer, a high net/gross ratio of 70% is applied, to offset the fact that Goad mainly records the unit footprint and may understate the total where there are upper floors.
The turnover ratios for the supermarkets derive from the Retail Rankings 2012, adjusted to remover petrol sales with an allowance for VAT added. For all other floorspace, the turnover ratios are estimates based on studies elsewhere.

6 Spare convenience capacity to 2017 and 2022

6.1 Definition

6.1.1 Spare expenditure capacity can exist in the following ways:

- Over-trading above average company levels, where it exists;
- Projected expenditure growth retained in the area;
- Potential to recapture a proportion of the expenditure outflows;
- Potential to attract new trade into the area, and
- 'Acceptable' levels of retail impact.

6.1.2 The last element on the list recognises that new stores, especially supermarkets, are often substantially serviced by trade diversion from other stores within their catchments. This gives rise to the issue of 'acceptable impact'.

6.1.3 Acceptable levels of impact refer to the situation where a proposed new store would drive the turnover of existing stores/ established centres, down below average levels, but not threaten them. The impact is normally expressed as the percentage below average levels. There is no set standard for what level of impact is acceptable, but this author would normally consider that impacts of 20% or more would potentially threaten the viability of stores or established centres- as broad brush guidance.

6.1.4 By convention, most retail capacity studies for local authorities do not take account of retail impact as a form of spare capacity; leaving the issue to be addressed by retail impact assessments for individual proposals. However, allowance for this factor probably improves guidance on the capacity to accommodate future opportunities.

6.1.5 Retail capacity studies commonly express the forecasts of spare capacity, after deducting planning consents. So the turnover of the recent supermarket consent at Gretna (relating to Dumfries & Galloway) needs to be deducted.

6.2 Capacity overview

6.2.1 There is little over-trading in the Dumfries catchment, but more significant under-trading in the Stranraer catchment. The projected growth in convenience expenditure is low, so the retained expenditure growth (turnover) in Table 5.3 doesn't promise much future capacity either (around £4 million by 2022 for Dumfries and about £1 million for Stranraer).

6.2.2 While there is potential to capture a proportion of convenience expenditure leakage from the two catchment areas, the levels of leakage are quite small in terms of servicing new supermarket floorspace. Assuming that 50% of the leakage could be recaptured, it amounts to less than £5 million for Dumfries by 2022 and just over £2 million for Stranraer.

6.2.3 The potential to draw significant new convenience trade into Dumfries & Galloway (increase inflows), is probably minimal because of the geography in relation to other populated areas. This not true for the supermarket consent at Gretna, where the part of the turnover has been apportioned to the Dumfries catchment in Table 6.1.

6.2.4 If an allowance for acceptable impact equivalent to 10% of the turnover of the mainstream [5]supermarkets, food discounters and Co-ops at average levels in every town is included, this will add to the capacity. It will be geographic by town, so the total could not be available to just Dumfries, for example. For the Dumfries catchment, the total would add some £18 million, for rough guidance. For the Stranraer catchment, there would be no addition, because of the level of existing under-trading.

6.3 Forecast range of spare expenditure capacity

6.3.1 A range of forecast spare convenience capacity for the two main retail catchment areas is illustrated in Tables 6.1 and 6.2.

6.3.2 The **low estimate** includes over/ under-trading, forecast expenditure growth retained in each area (turnover), plus the

[5] Tesco, Morrisons, Sainsbury's, Aldi and Lidl and Co-ops

Table 6.1 **Dumfries main catchment: spare convenience expenditure capacity (in 2010 prices)**				
			2012-17 £million	2012-22 £million
Growth in retained residents' expenditure- Table 5.3			4.3	4.1
Current over-trading-Table 5.5	3%		6.3	6.3
Sub total	(a)		10.6	10.4
potential to reduce outflow	*2017*	*2022*		
Outflow £million- Table 5.3	9.4	9.4		
Potential to clawback 50% of leakage assumed	(b)		4.7	4.7
potential to increase inflow	*2017*	*2022*		
Inflow £million- Table 5.3	4.7	4.7		
Potential to increase inflow by 0% assumed	(c)		0	0
Notional 'acceptable' levels of impact	*2017*	*2022*		
say, equivalent to 10% of turnover of catchment supermarkets,	180.8	180.8		
including Aldi, Lidl and co-ops	(d)		18.1	18.1
less planning commitments-(Gretna supermarket)	(e)		-10.6	-10.6
Potential spare capacity - high estimate	a+b+c+d-e		**22.8**	**22.5**
Potential spare capacity - low estimate	a+d-e		**18.1**	**17.8**

Note
See text. The Gretna supermarket has an estimated convenience turnover of £21.2 million. It is assumed that 50% of the turnover (£10.6 million) could come from visitors to the Outlet Centre

Table 6.2 **Stranraer main catchment: spare convenience expenditure capacity (in 2010 prices)**				
			2012-17 £million	2012-22 £million
Growth in retained residents' expenditure- Table 5.3			1.0	0.9
Current under- trading-Table 5.5	-15%		-9.5	-9.5
Sub total	(a)		-8.5	-8.5
potential to reduce outflow	*2017*	*2022*		
Outflow £million- Table 5.3	4.7	4.7		
Potential to clawback 50% of leakage assumed	(b)		2.3	2.3
potential to increase inflow	*2017*	*2022*		
Inflow £million- Table 5.3	0	0		
Potential to increase inflow by 0% assumed	(c)		0	0
Notional 'acceptable' levels of impact	*2017*	*2022*		
say, equivalent to 10% of turnover of catchment supermarkets	49.0	49.0		
Not applicable because of existing, higher, level of under-trading	(d)		0	0
less planning commitments-none	(e)		0	0
Potential spare capacity - high estimate	a+b+c+d-e		**-6.1**	**-6.2**
Potential spare capacity - low estimate	a+d-e		**-8.5**	**-8.5**

Note
See text

allowance for acceptable impact, less planning consents.

6.3.3 The **high estimate** includes the above, plus an allowance for the claw back of leakage. It is estimated that the potential to attract new convenience trade into the catchments is negligible.

6.3.4 Table 6.3 summarises the forecasts. There is very little difference between the forecasts up to 2017 and up to 2022, where there is a slight decline in forecast expenditure caused by projected population decline.

6.3.5 The table shows the value of the forecast spare convenience capacity and the equivalent floorspace. The latter is shown as the purely net convenience sales floorspace and also as equivalent gross supermarket floorspace, with an allowance for some comparison sales for additional guidance. For retail proposals with lower turnover ratios than typical mainstream supermarkets, the expenditure capacity would support more floorspace than illustrated.

6.3.6 While the potential contribution from local impact appears to contribute a lot to the forecast capacity figures for the Dumfries catchment, the figure relates to all the various towns in the catchment, so there are limitations on its availability in any single location. Dumfries would be the only location where a substantial part of the total forecast capacity could potentially be drawn upon to service a single new store.

6.3.7 In Table 6.1, the forecast spare convenience capacity could potentially support a new mid- size supermarket in Dumfries, but probably with higher levels of impact on the local supermarkets compared to the nominal allowance indicated in the table. The capacity would also service some additional small food store developments or supermarket extensions in the other, smaller towns.

6.3.8 In the Stranraer catchment, there is no forecast spare convenience capacity to 2022 under the assumptions in this study. However, there would be additional capacity if higher levels of trade diversion on the existing stores are accepted under planning policy as a special case. For example, the wider, regeneration benefits of the opportunity to develop a supermarket on the Stranraer waterfront would fall into this category.

6.4 Council area spare convenience capacity

6.4.1 This will be the same as for the Dumfries main catchment.

6.4.2 By their nature, capacity studies are broad brush exercises and some sensitivity testing is important. However, the range provided by the low and high estimates in this report is wide, which reduces the need for sensitivity testing of convenience capacity unless specific issues require to be explored.

6.4.3 New out of centre supermarket proposals will still require to be supported by a retail impact assessment, where required under policy.

6.5 Sensitivity testing

6.5.1 There is no good reason to test different convenience expenditure growth scenarios, because all the official projected growth rates are extremely low.

6.5.2 If the population growth from 2012-22 is 5% greater than Registrar General's 2010 based projections applied in this study, the forecast convenience capacity, in terms of equivalent supermarket floorspace (allowing for an element of comparison floorspace) would be a little higher than our main case:

Low range: up to 5,800 sq m gross by 2022

High range: up to 6,800 sq m gross by 2022

6.5.3 The figures apply to the Dumfries catchment, with the same qualifications applying to the Stranraer catchment as mentioned previously.

Table 6.3
Dumfries and Stranraer main catchment areas: range of spare convenience capacity and equivalent floorspace, excluding existing planning consents (in 2010 prices)

	2012-17		2012-22	
Dumfries main catchment area	**low**	**high**	**low**	**high**
	£million	£million	£million	£million
Spare expenditure capacity	18.1	22.8	17.8	22.5
Equivalent supermarket floorspace *(at £11,264 per sq m net)*				
convenience floorspace- sq m net	1,600	2,000	1,600	2,000
*indicative total supermarket floorspace- sq m gross	3,600	4,500	3,500	4,400
Stranraer main catchment area	**low**	**high**	**low**	**high**
	£million	£million	£million	£million
Spare expenditure capacity	-8.5	-6.1	-8.5	-6.2
Equivalent supermarket floorspace *(at £11,264 per sq m net)*	0	0	0	0

Dumfries & Galloway Council area
As for the Dumfries main catchment, as there is no capacity in the Stranraer main catchment

Note
The high and low estimates are shown in Table 6.1 & 6.2.
* Supermarkets normally have a proportion of floorspace devoted to comparison goods. The gross floorspace shown in this table allows for 25% of the floorspace for comparison sales and assumes a net/ gross ratio of 60%. The total is indicative, as operator formats vary.
The equivalent floorspace figures are rounded to the nearest 100 sq m

7 Comparison retail expenditure and turnover

7.1 Introduction

7.1.1 As for convenience retailing, this section shows the relationship between comparison expenditure and turnover for the catchment areas of Dumfries and Stranraer, and for the Council area as a whole, taking account of the shopping patterns. Thus, the total turnover in each catchment area derives from the residents' expenditure potential, plus inflows, less outflows.

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

7.2 Comparison goods- definition

7.2.1 Comparison goods include:

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

7.2.2 This definition is provided in Pitney Bowes' *Retail Expenditure Guide 2011-12*, based on Central Government survey classifications. The study brief requires assessment of the forecast retail capacity for:

Bulky goods

Other comparison goods

7.2.3 In this report, bulky goods expenditure refers to the following categories: *furniture/ floorcoverings and household textiles; domestic appliances and half of expenditure on audio visual equipment/ phones; and DIY, tools, plants, but excluding china and glass.* This definition is selected for consistency with that used in the 2006 Retail Capacity Study and the associated NEMS household survey questions 19, 21 and 23.

7.2.4 Bulky goods are those normally sold in retail parks as well as in town centres. Small electrical items are also sold in retail parks and town centres, alongside domestic appliances, which explains why half the expenditure on these goods was included under bulky goods in the [6]2006 Study.

7.3 Comparison expenditure growth rates

7.3.1 As stated in section 5, retail expenditure per capita data for Dumfries & Galloway was acquired from the Pitney Bowes *AnySite* report commissioned for this study. This contains specific forecasts of the comparison expenditure per capita for the Council area. The forecast annual growth rate for all comparison goods is 4.1% per annum from 2010-21, which is similar to their forecast rate for the UK for that period. For the Council area, the outcome would produce very high amounts of forecast spare comparison capacity under that growth rate.

7.3.2 Under the current economic conditions, growth rates in comparison expenditure have been much lower. Considerable uncertainty remains and the Government forecasts of economic growth have been revised downwards recently. A view has to be taken on what rate is should be applied in this study for the Council.

7.3.3 [7]Experian, for example, forecast an annual growth rate of 3% per annum for comparison expenditure in the UK over most of the period of this study and beyond. The Pitney Bowes' forecast for 2008-16 for comparison expenditure growth in the UK is also 3% per annum on average, which includes the difficult current economic circumstances.

[6] See footnote on page 41 of the 2006 Study

[7] Retailer Planner, Briefing Note 9- Sept 2011

Table 7.1
Dumfries & Galloway bulky goods and other comparison goods expenditure per capita per annum, *excluding special forms of retailing* (in 2010 prices)

	2010 £	2012 £	2017 £	2022 £
Bulky goods *excluding special forms of retailing*	805	854 717	992 801	1,152 912
Other comparison goods *excluding special forms of retailing*	1,959	2,079 1,812	2,414 2,041	2,804 2,335

Source:
2010 figures-Pitney Bowes AnySite report for Dumfries & Galloway, commissioned for this study.
Annual growth rate of 3.035% derived from Pitney Bowes *Retail Expenditure Guide 2011-12, November 2011 Update*, Table 3.5 for 2008-16
Special forms of retailing include mail order and internet sales, which require to be deducted so that the expenditure relates to conventional retail floorspace- see Appendix 3. Pitney Bowes' high growth rate scenario in internet sales is assumed.

Table 7.2
Dumfries and Stranraer main retail catchment areas: bulky goods and other comparison goods expenditure potential of the residents *excluding special forms of retailing* (in 2010 prices)

	2012 £million	2017 £million	2022 £million
Dumfries main catchment			
Bulky goods	85.1	94.8	107.3
Other comparison goods	215.0	241.4	274.6
Stranraer main catchment			
Bulky goods	21.3	23.7	26.8
Other comparison goods	53.7	60.3	68.6
Dumfries & Galloway			
Bulky goods	106.4	118.4	134.1
Other comparison goods	268.7	301.7	343.1

Note
From Tables 2.1 and 7.1

7.3.4 Accordingly, this report adopts the conservative annual growth rate of 3% per annum as the main case for 2012-22. .

7.4 Comparison expenditure potential and the internet

7.4.1 Table 7.1 shows the forecast expenditure per capita on bulky goods and for other comparison goods. Special forms of retailing, including internet spending, have been deducted, as shown in the table. This distinguishes the expenditure available to service conventional retail floorspace.

7.4.2 In this report, we have applied the higher estimate of growth in special forms of retailing on comparison goods provided by Pitney Bowes; driven by the internet. The proportion is forecast to rise from over 13% of all comparison expenditure currently, to nearly 17.7% by 2021, compared to 14.7% under their central case. Details are provided in Appendix 3. All retail press reports indicate very rapid recent growth in internet retail expenditure on comparison goods.

7.4.3 Table 7.2 shows the forecast expenditure potential of the residents of the Dumfries and Stranraer main catchment areas up to 2022.

7.5 Expenditure patterns

7.5.1 Assessment of the bulky goods and other comparison shopping patterns has been re-worked directly from the NEMS household interview survey tabulations for the relevant goods categories in the 2006 survey, as set out in Appendix 4. This exercise was not undertaken in the 2006 Retail Capacity Study.

7.5.2 Questions 17 (clothes shopping), 19 (domestic appliances etc), 21 (furniture etc), 23 (DIY), 25 (chemists goods etc) and 27 (other non-food items) from the NEMS survey underpin our analysis of the shopping patterns. These identify specific stores and centres in detail. The responses are combined and weighted by the Pitney Bowes expenditure per capita data to represent patterns for bulky goods and other comparison goods expenditure. The approach is orthodox for retail capacity studies generally.

7.5.3 Allowance for **visitor spending** on the 'other comparison' goods category in Dumfries & Galloway has been included, based on research data from Visit Scotland and the UK Tourism Survey 2010. This allowance has been added to the expenditure inflows, together with a notional addition to allow for visitor spending at the Gretna Outlet, beyond the visitor based data. It is explained in Appendix 4. While there will be some expenditure loss by residents of Dumfries & Galloway shopping on holiday elsewhere, it would be surprising if it amounted to anything approaching the level of visitor spend in the Council area.

7.5.4 Tables 7.3 and 7.4 show the expenditure patterns for bulky goods expenditure and other comparison goods expenditure for the Dumfries and Stranraer main catchment areas. These refer to the inflows and outflows of expenditure, expressed as a percentage of the catchment area residents' expenditure potential.

7.5.5 For Dumfries, the inflows of bulky goods expenditure originate from the Stranraer catchment. The outflows to centres beyond the Council area are at a modest level, based on the NEMS survey findings. This is unsurprising, given the alternative of long car journeys for these types of goods, and shoppers will commonly search locally, depending on the offer. The principal destinations are the retail parks in Dumfries, and also the town centre.

7.5.6 For Dumfries, the inflows of other comparison goods expenditure are proportionally higher compared to bulky goods, because of visitor spending. The outflows of expenditure on other comparison goods are also higher. This is boosted by higher proportions of expenditure leakage on clothing and footwear, notably to Carlisle. Otherwise, Dumfries town centre remains by far the dominant attraction.

7.5.7 In Table 7.4, there are no recorded inflows of bulky goods and other comparison expenditure to Stranraer. The outflows from the Stranraer catchment are high for both categories of goods, most of which goes to Dumfries.

7.6 Expenditure leakage from the Council area

7.6.1 Table 7.5 shows the expenditure patterns for the Council area as a whole. The leakage is 15% for bulky goods expenditure and 21% for other comparison goods expenditure.

7.6.2 The 2006 Capacity Study estimated that bulky goods expenditure leakage from the Council area was nearly 25% and leakage of 42% for other comparison goods in the footnote page 43 of the Study. It is unclear how these relatively high estimates of leakage from the Council area were derived.

7.6.3 Evidence to support lower estimates of leakage in this update is contained in Appendix 4, together with copies of the detailed responses to the relevant NEMS questions on shopping patterns by goods types.

7.7 Bulky goods and other comparison floorspace and turnover in 2012

7.7.1 The current distribution of bulky goods and other comparison retail floorspace in the Dumfries and Stranraer main catchment areas is shown in Tables 7.6 and 7.7 respectively. The total turnover in the catchments is controlled to the expenditure based total from the NEMS survey. Details of the turnover of the retail parks and comparison

Table 7.3
Dumfries main catchment area: bulky goods and other comparison goods expenditure patterns and turnover (in 2010 prices)

	%	2012 £million	2017 £million	2022 £million
Dumfries catchment- bulky goods				
Catchment residents' expenditure potential		85.1	94.8	107.3
Add: inflows	9%	7.4	8.3	9.4
Less: outflows	-16%	-13.4	-14.9	-16.9
Retained expenditure (turnover)		**79.1**	**88.1**	**99.7**
Dumfries catchment- other comparison goods				
Catchment residents' expenditure potential		215.0	241.4	274.6
Add: inflows from survey	7%	15.7	17.7	20.1
plus visitor spending	8%	17.2	19.3	22.0
Less: outflows	-22%	-46.4	-52.1	-59.3
Retained expenditure (turnover)		**201.5**	**226.3**	**257.4**

Note
From Table 7.2 and Appendix 4. See also text.

Table 7.4
Stranraer main catchment area: bulky goods and other comparison goods expenditure patterns and turnover (in 2010 prices)

	%	2012 £million	2017 £million	2022 £million
Stranraer catchment- bulky goods				
Catchment residents' expenditure potential		21.3	23.7	26.8
Add: inflows	0%	0.0	0.0	0.0
Less: outflows	-45%	-9.6	-10.7	-12.2
Retained expenditure (turnover)		**11.6**	**12.9**	**14.6**
Stranraer catchment- other comparison goods				
Catchment residents' expenditure potential		53.7	60.3	68.6
Add: inflows from survey	0%	0.0	0.0	0.0
plus visitor spending	4%	2.0	2.2	2.6
Less: outflows	-47%	-25.0	-28.1	-32.0
Retained expenditure (turnover)		**30.6**	**34.4**	**39.1**

Note
From Table 7.2 and Appendix 4. See also text.

Table 7.5
Dumfries & Galloway Council area: bulky goods and other comparison goods expenditure patterns and turnover (in 2010 prices)

	%	2012 £million	2017 £million	2022 £million
Council area- bulky goods				
Catchment residents' expenditure potential		106.4	118.4	134.1
Add: inflows	0%	0	0	0
Less: outflows	-15%	-15.6	-17.4	-19.7
Retained expenditure (turnover)		**90.8**	**101.0**	**114.4**
Council area- other comparison goods				
Catchment residents' expenditure potential		268.7	301.7	343.1
Add: inflows from survey	0%	0	0	0
plus visitor spending	7%	19.2	21.6	24.5
Less: outflows	-21%	-55.7	-62.6	-71.2
Retained expenditure (turnover)		**232.1**	**260.7**	**296.5**

Note
From Table 7.3 and 7.4. See also text.

turnover in the supermarkets are shown in Appendix 5.

7.7.2 For the Dumfries catchment, there is a good fit between the level of other comparison goods floorspace and the total expenditure-based turnover. The deduced turnover/ floorspace ratios are at the average levels that could be expected for the area. There is no over/ under trading.

7.7.3 For bulky goods in Dumfries, the same is not true. The floorspace is well below the level that would match the expenditure based total turnover of the catchment at average levels. A high level of current over-trading in the bulky goods categories is implied, as indicated in Table 7.6. Most of this is likely to relate to the retail parks and Dumfries town centre, based on the NEMS survey findings.

7.7.4 The high level of over-trading is not simply explained by consideration that the survey findings on shopping patterns might be incorrect or that there may be a lot of unrecorded bulky goods floorspace. The NEMS shopping patterns are in fact quite consistent across the different categories of bulky goods. While there may be some unrecorded bulky goods floorspace, it is unlikely to be large compared to the recorded total.

7.7.5 Therefore the evidence presented in Table 7.6 may be largely correct. In fact, Dumfries & Galloway has rather limited bulky goods floorspace compared to some Council areas elsewhere, as mentioned in section 4. The issue of geography probably also has a strong bearing, where residents in Dumfries & Galloway have to travel very considerable distances to shop at competitor centres. Thus, there is less incentive for operators to expand their floorspace in the absence of much competition. Furthermore, there is greater concentration among the key operators in the bulky goods market, compared to the past.

7.7.6 Also, other market reasons are likely to have contributed to the situation; importantly, the lack of investment funding for retail warehousing, as explained in section 4. Another possibility is that current levels of internet spending on bulky goods could be higher than average in Dumfries & Galloway because of the geography.

7.7.7 In Table 7.7, the issues are similar for the Stranraer catchment, with a good fit between the expenditure based total turnover and the associated floorspace, where average deduced turnover/ floorspace levels prevail. Again, there is evidence of high levels of over-trading in the bulky goods categories. This is perhaps less surprising than the case in Dumfries, because there is no significant bulky goods retail warehousing in Stranraer and very limited bulky goods floorspace.

7.7.8 Finally, it should be noted that some shops sell a mix of bulky goods and other comparison goods, so it is impossible to be very precise about the floorspace attributable to each category.

7.8 Planning commitments

7.8.1 There are no current major planning consents for additional bulky goods floorspace or for other comparison goods floorspace in Dumfries & Galloway.

Table 7.6
Dumfries main catchment area: bulky goods and other comparison floorspace and turnover at average levels (in 2010 prices)

	Floorspace sq m		Average turnover levels	Turnover
	gross	net	£ per sq m	£million
Dumfries town centre				
Bulky goods	6,200	4,340	4,200	18.2
Other comparison goods	31,514	22,060	4,887	107.8
Dumfries Retail Parks (excl. Tesco at Cuckoo Bridge)				
Bulky goods	14,751	11,801	2,426	28.6
Other comparison goods	6,891	5,513	3,132	17.3
Dumfries catchment area supermarkets				
Bulky goods				
Other comparison goods	7,089	4,593	5,982	27.5
Lockerbie, Moffat, Annan,Langholm,Gretna TC, Thornhill & Sanquar				
Bulky goods	740	444	2,100	0.9
Other comparison goods	10,254	6,152	2,443	15.0
Gretna Outlet Village				
Bulky goods	720	432	2,520	1.1
Other comparison goods	9,280	5,568	2,932	16.3
Castle Douglas, Kirkcubright, Dalbeattie				
Bulky goods	2,693	1,616	2,520	4.1
Other comparison goods	10,000	6,000	2,932	17.6
Bulky goods floorspace over-trading			*49%*	*26.2*
Total Dumfries catchment area -actual trading levels				
Bulky goods	25,104	18,633		**79.1**
Other comparison goods	75,028	49,886		**201.5**

Note
Details of retail parks and supermarket comparison floorspace are provided in Appendix 5
It is assumed that the turnover ratio of Castle Douglans/ Kirkcubright/ Dalbeattie and the Gretna Outlet is 60% of the turnover ratio of Dumfries TC and for the other small tow ns, 50% of the Dumfries TC turnover ratio.
The totals are controlled to the actual, expenditure based totals from Table 7.3

Table 7.7
Stranraer main catchment area: bulky goods and other comparison floorspace and turnover at average levels (in 2010 prices)

	Floorspace sq m		Average turnover levels	Turnover
	gross	net	£ per sq m	£million
Stranraer town centre				
Bulky goods	2,590	1,813	3,200	5.8
Other comparison goods	9,620	6,734	3,752	25.3
Stranraer catchment area supermarkets				
Bulky goods				
Other comparison goods	594	366	4,877	1.8
Newton Stewart				
Bulky goods	823	494	2,240	1.1
Other comparison goods	1,825	1,095	2,626	2.9
Whithorn & Wigtown				
Bulky goods	134	80	1,600	0.1
Other comparison goods	623	374	1,876	0.7
Bulky goods floorspace over-trading			*65%*	*4.6*
Total Stranraer catchment area- actual trading levels				
Bulky goods	3,547	2,387		**11.6**
Other comparison goods	12,662	8,569		**30.6**

Note
Details of retail parks and supermarket comparison floorspace are provided in Appendix 5
It is assumed that the turnover ratio of Newton Stewart is 70% of the turnover ratio of Stranraer TC and Whithorn/ Wigtown is 50% of the Stranraer TC turnover ratio.
The totals are controlled to the actual, expenditure based totals from Table 7.4

8 Spare bulky goods and comparison expenditure capacity to 2017 and 2022

8.1 Definition

8.1.1 Spare retail expenditure capacity has been defined in detail at the beginning of section 6 and the components are listed again, because they set the structure of this section.

- Over-trading above average company levels, where it exists;
- Projected expenditure growth retained in the area;
- Potential to recapture a proportion of the expenditure outflows;
- Potential to attract new trade into the area, and
- 'Acceptable' levels of retail impact.

8.1.2 Forecasts beyond 2017 should be treated with considerable caution, because of increasing uncertainties as time advances. This is particularly important for bulky goods/ comparison expenditure, where the forecast growth rates are much higher than those for convenience expenditure.

8.2 Capacity overview- bulky goods, Dumfries

8.2.1 Table 8.1 shows the forecast bulky goods expenditure capacity for the Dumfries catchment.

8.2.2 There is limited forecast expenditure growth to 2017, but it becomes substantial by 2022. The estimated over-trading is the main contributor to the capacity forecast.

8.2.3 The potential to recapture expenditure leakage is probably limited, because of the moderate level of leakage and the fact that some shoppers will continue to seek additional choice elsewhere. The potential to attract new bulky goods trade to Dumfries is probably negligible. Any potential increase would come from Stranraer, but it is more likely that new developments in Dumfries would simply redistribute the existing expenditure from Stranraer.

8.2.4 The capacity forecasts for bulky goods are in complete contrast to the retail market. It would be unhelpful to produce a table showing equivalent bulky goods retail floorspace on a scale which would be unrealistic in the circumstances.

8.2.5 So it is best to simply acknowledge that there is ample spare expenditure capacity to support additional bulky goods floorspace in Dumfries. As mentioned earlier in the study, the most likely new developments are likely to take the form of mezzanine floors, reconfigurations and extensions to the retail parks. Should larger proposals emerge in the future, expenditure capacity would not be a limitation.

8.3 Capacity overview- other comparison goods, Dumfries

8.3.1 The forecast expenditure capacity for other comparison goods in the Dumfries catchment is shown in Table 8.2

8.3.2 There is substantial forecast growth in expenditure on other comparison goods up to 2017 and 2022. As indicated in the table, there is no current over-trading. The potential to recapture expenditure leakage is probably limited because shoppers will continue to look for variety and choice elsewhere. Nevertheless, the value of the leakage is quite high, so recapture of 30% of the leakage represents a fair addition to the spare capacity.

8.3.3 It is estimated that the potential to attract new trade to the Dumfries catchment will be limited because of the geography and for similar reasons mentioned for bulky goods expenditure. An allowance for acceptable retail impact equivalent to 10% of the turnover of Dumfries town centre and other comparison turnover in the retail parks adds to the total.

Table 8.1
Dumfries main catchment: spare bulky goods expenditure capacity (in 2010 prices)

			2012-17 £million	2012-22 £million
Growth in retained residents' expenditure- Table 7.3			8.9	20.6
Current over-trading-Table 7.5	49%		26.2	26.2
Sub total	(a)		35.1	46.8
potential to reduce outflow	*2017*	*2022*		
Outflow £million- Table 7.3	14.9	16.9		
Potential to clawback 30% of leakage assumed	(b)		4.5	5.1
potential to increase inflow	*2017*	*2022*		
Inflow £million- Table 7.3	8.3	9.4		
Potential to increase inflow- negligible	(c)		0	0
Notional 'acceptable' levels of impact	*2017*	*2022*		
say, equivalent to 10% of bulky turnover of Dumfries TC & R Parks	46.9	46.9		
	(d)		4.7	4.7
less planning commitments-none	(e)		0	0
Potential spare capacity - high estimate	a+b+c+d-e		**44.3**	**56.5**
Potential spare capacity - low estimate	a+d-e		**39.8**	**51.5**

Note
See text

Table 8.2
Dumfries main catchment: expenditure capacity for other comparison goods (in 2010 prices)

			2012-17 £million	2012-22 £million
Growth in retained residents' expenditure- Table 7.3			24.8	55.9
Current over-trading-Table 7.5	0%		0	0
Sub total	(a)		24.8	55.9
potential to reduce outflow	*2017*	*2022*		
Outflow £million- Table 7.3	52.1	59.3		
Potential to clawback 30% of leakage assumed	(b)		15.6	17.8
potential to increase inflow	*2017*	*2022*		
Inflow £million- Table 7.3	17.7	20.1		
Potential to increase inflow by 10% assumed	(c)		1.8	2.0
Notional 'acceptable' levels of impact	*2017*	*2022*		
say, equivalent to 10% of turnover of other comparison turnover	125.1	125.1		
of Dumfries TC & R Parks	(d)		12.5	12.5
less planning commitments-none	(e)		0	0
Potential spare capacity - high estimate	a+b+c+d-e		**54.7**	**88.2**
Potential spare capacity - low estimate	a+d-e		**37.3**	**68.4**

Note
See text

8.4 Forecast range of spare expenditure capacity- Dumfries

8.4.1 A range of forecast spare capacity for bulky goods and other comparison goods in the Dumfries main retail catchment area is illustrated in Table 8.3, similar to the method applied in section 6.

8.4.2 The **low estimate** includes over/ under-trading, forecast expenditure growth retained in each area (turnover), plus the allowance for acceptable impact, less planning consents (none).

8.4.3 The **high estimate** includes the above, plus an allowance for the claw back of leakage.

8.4.4 Table 8.3 summarises the forecasts for the Dumfries catchment. Most of the potential relates to Dumfries itself, as the main shopping centre in the area. The table shows the value of the forecast spare capacity and the equivalent floorspace in the case of other comparison goods.

8.4.5 Spare capacity for other comparison goods expenditure could readily support the indicative demand, together with other proposals. Market demand is a greater limitation, as there is no appetite for major town centre shopping developments. The capacity would also support some additional out of centre general comparison floorspace, which raises the issue of balancing provision to attract new retailers with retail park requirements while protecting the town centre.

8.4.6 Forecasts beyond 2017 should be viewed with caution, because of the greater uncertainties.

Table 8.3
Dumfries main catchment area: range of spare expenditure capacity for bulky goods and other comparison goods (in 2010 prices)

	2012-17		2012-22	
	low	**high**	**low**	**high**
Bulky goods	£million	£million	£million	£million
Spare expenditure capacity	39.8	44.3	51.5	56.5
Other comparison goods	**low**	**high**	**low**	**high**
Spare expenditure capacity	37.3	54.7	68.4	88.2
Equivalent floorspace (at £4,500 per sq m net) other comparison goods floorspace- sq m net	8,300	12,200	15,200	19,600

Note
Based on Tables 8.1 and 8.2. Refer to section 4 for interpretation against the market conditions and trends.
The equivalent floorspace figures are rounded to the nearest 100 sq m

8.5 Capacity overview- bulky goods, Stranraer

8.5.1 Table 8.4 shows the forecast bulky goods expenditure capacity for the Dumfries catchment.

8.5.2 There is very limited forecast expenditure growth to 2022, with the estimated over-trading forming the main element of spare capacity.

8.5.3 The potential to recapture expenditure leakage is probably limited, because of the wider offer in Dumfries. So we have allowed for up to the proportion shown in Table 8.4. Also, it may become more difficult to claw back leakage if the offer in Dumfries improves in the future. The potential to attract new bulky goods trade to Stranraer is probably negligible.

8.5.4 In Table 8.4, the forecast spare bulky goods expenditure capacity for the Dumfries catchment is considerable compared to the existing turnover, simply because the existing provision of bulky goods floorspace is very limited. The absolute amount, though, is low.

8.5.5 Table 8.6 provides estimates of equivalent new bulky goods net retail floorspace which may be supported by the expenditure capacity forecasts. The forecast of equivalent bulky goods floorspace has been treated in the same way as that for Dumfries in Table 8.3, for the same reasons.

8.6 Capacity overview- other comparison goods, Stranraer

8.6.1 The forecast expenditure capacity for other comparison goods in the Stranraer catchment is shown in Table 8.6, with the equivalent floorspace assumed at a lower level compared to Dumfries. The total is quite low, on the assumption that high levels of leakage to Dumfries will continue and the potential to attract new trade will be insignificant.

8.7 Forecast range of spare expenditure capacity- Stranraer

8.7.1 The range of forecast spare bulky goods and other comparison goods expenditure capacity for the Stranraer main retail catchment is illustrated in Table 8.6. The table shows the value of the forecast spare convenience capacity and the equivalent floorspace.

8.7.2 For bulky goods, the outcome indicates potential for some small unit development in the Stranraer catchment. For other comparison goods, the outcome would support limited town centre related developments.

8.8 Council area spare bulky goods and other comparison goods capacity

8.8.1 Table 8.7 illustrates the low and high range of forecast spare capacity for the whole Council area, derived from the totals for the Dumfries and Stranraer catchments.

8.8.2 This will be the same as for the Dumfries main catchment, in the absence of capacity in the Stranraer main catchment

8.9 Sensitivity testing

8.9.1 For bulky goods and comparison retailing, the study findings indicate that there is more than ample spare expenditure to meet potential future demand and that market considerations are really the main limitation. Consequently, we have not included sensitivity testing with a higher population projection, as presented in the section on convenience capacity.

8.9.2 The main case in this study already assumes a very low expenditure growth rate compared to past trends and it is at the low end of the official agency forecasts. There is no particular justification for assuming higher forecasts, and the production of lower forecasts risks perhaps too much departure from the specialists' forecasts.

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Table 8.4
Stranraer main catchment: spare bulky goods expenditure capacity (in 2010 prices)

			2012-17 £million	2012-22 £million
Growth in retained residents' expenditure- Table 7.4			1.3	3.0
Current over-trading-Table 7.7	65%		4.6	4.6
Sub total	(a)		5.9	7.6
potential to reduce outflow	*2017*	*2022*		
Outflow £million- Table 7.4	10.7	12.2		
Potential to clawback 30% of leakage assumed	(b)		3.2	3.6
potential to increase inflow	*2017*	*2022*		
Inflow £million- Table 7.4	21.6	24.5		
Potential to increase inflow by 0% assumed	(c)		0	0
Notional 'acceptable' levels of impact	*2017*	*2022*		
say, equivalent to 10% of bulky turnover of Stranraer TC	5.8	5.8		
	(d)		0.6	0.6
less planning commitments-none	(e)		0	0
Potential spare capacity - high estimate	a+b+c+d-e		**9.7**	**11.8**
Potential spare capacity - low estimate	a+d-e		**6.5**	**8.2**
Note See text				

Table 8.5
Stranraer main catchment: expenditure capacity for other comparison goods (in 2010 prices)

			2012-17 £million	2012-22 £million
Growth in retained residents' expenditure- Table 7.4			3.8	8.5
Current over-trading-Table 7.6	0%		0	0
Sub total	(a)		3.8	8.5
potential to reduce outflow	*2017*	*2022*		
Outflow £million- Table 7.4	28.1	32.0		
Potential to clawback 20% of leakage assumed	(b)		5.6	6.4
potential to increase inflow	*2017*	*2022*		
Inflow £million- Table 7.4	0.0	0.0		
Potential to increase inflow by 0% assumed	(c)		0	0
Notional 'acceptable' levels of impact	*2017*	*2022*		
say, equivalent to 10% of turnover of other comparison turnover	25.3	25.3		
of Stranraer TC	(d)		2.5	2.5
less planning commitments-none	(e)		0	0
Potential spare capacity - high estimate	a+b+c+d-e		**11.9**	**17.4**
Potential spare capacity - low estimate	a+d-e		**6.3**	**11.0**
Note See text				

Table 8.6
Stranraer main catchment area: range of spare expenditure capacity for bulky goods and other comparison goods (in 2010 prices)

	2012-17		2012-22	
	low	**high**	**low**	**high**
Bulky goods	£million	£million	£million	£million
Spare expenditure capacity	6.5	9.7	8.2	11.8
Other comparison goods	**low**	**high**	**low**	**high**
Spare expenditure capacity	6.3	11.9	11.0	17.4
Equivalent floorspace (at £3,750 per sq m net) other comparison goods floorspace- sq m net	1,700	3,200	2,900	4,600

Note
Based on Tables 8.1 and 8.2. Refer to section 4 for interpretation against the market conditions and trends.
The equivalent floorspace figures are rounded to the nearest 100 sq m

Table 8.7
Dumfries & Galloway Council area: range of spare expenditure capacity for bulky goods and other comparison goods (in 2010 prices)

	2012-17		2012-22	
	low	**high**	**low**	**high**
Bulky goods	£million	£million	£million	£million
Spare expenditure capacity	46.3	54.0	59.6	68.4
Other comparison goods	**low**	**high**	**low**	**high**
Spare expenditure capacity	43.6	66.6	79.4	105.6
Equivalent other comparison goods floorspace- sq m net	10,000	15,400	18,100	24,200

Note
Based on Tables 8.3 and 8.6
The equivalent floorspace figures are rounded to the nearest 100 sq m

9 Conclusions and recommendations

9.1 Introduction

9.1.1 This section contains conclusions on key issues and recommendations on how the emerging Local Development Plan can best promote retail development in Dumfries & Galloway in the future, based on the analysis of market conditions and forecast expenditure capacity in this report.

9.1.2 The study conclusions and recommendations are provided in an abbreviated form, to avoid repetition of the detail provided in the previous sections.

9.2 Network of centres

9.2.1 The roles of the existing centres identified in the Structure Plan, together with proposed refinements in the MIR which include reference to the roles of the retail parks in Dumfries, represent the network of centres in the Council area. In addition, it is proposed to change the designation of the Peel Centre to a commercial centre, from the originally proposed local centre designation in the MIR. There will be supplementary guidance to define its role and function. Nothing emerges from this study that suggests any further changes are needed.

9.2.2 However, the emerging Plan could consider some additional brief guidance on the definition of neighbourhood centres and their notional catchments, for example, a five minute walking radius. Neighbourhood centres are often anchored by a small supermarket of around 300-500 sq m gross. Additional guidance would be helpful in deflecting (mainly supermarket) proposals of an inappropriate scale. Advice on neighbourhood centres is provided in this study- see section 4.8.

9.3 Forecast spare convenience capacity

9.3.1 The forecast spare capacity could potentially support another mid-size supermarket in Dumfries, plus some extensions or small additions to the convenience floorspace in other towns within its main catchment. There would be additional capacity to support a new supermarket opportunity in Stranraer, provided higher levels of trade diversion on existing stores are accepted under planning policy, compared to the levels indicated in this study. This could be justified as a special case in support of the wider benefits of the regeneration of Stranraer Waterfront.

9.4 Distribution of convenience floorspace

9.4.1 The existing distribution is good, with main supermarket operator representation in almost all the main towns. Dumfries would benefit from improved choice among the main operators, so it is the principal opportunity for the forecast spare capacity. Development interest exists for the supermarket opportunity and there are continuing convenience retailer requirements for the town. There is no under-provision in Stranraer.

9.4.2 *Recommendation*- that provision for an additional supermarket in Dumfries is considered for inclusion in the LDP. Elsewhere in the Dumfries catchment, the capacity would support small additions to the convenience retail floorspace. An additional supermarket is required in Stranraer to support regeneration of the Waterfront. The scale should consider the levels of impact on the existing stores.

9.5 Forecast bulky goods and comparison capacity

9.5.1 There is ample spare bulky goods expenditure capacity to support new floorspace proposals. The obstacle to further development is the weak retail market and problems with funding.

9.5.2 For other comparison goods, there is significant capacity in Dumfries and limited capacity in Stranraer, but sufficient to meet likely future demand.

9.6 Distribution of bulky goods floorspace

9.6.1 The existing concentration in Dumfries appears to serve the region well. There is no reason to make special provision in the small towns. At some stage, the bulky goods market will probably recover and there may be additional floorspace requirements. In the meantime, some 5,000 sq m of vacant units remain at the two bulky goods retail parks in Dumfries.

9.6.2 Lifting the bulky goods restrictions on increments of this space could be justified if there is a special case, such as a large space user. Lifting the restrictions entirely poses a risk that retailers may relocate from the town centre into subdivided units.

9.6.3 *Recommendation*- that the existing bulky goods restrictions are maintained at the relevant parks, as the principal supply to meet any upturn in demand in the future. Any change would have to be fully justified in terms of the sequential test and the likely effects on the town centre.

9.7 Distribution of other comparison floorspace

9.7.1 Dumfries town centre contains the main concentration of comparison retailing in the Council area and it is of key importance to serving the whole region, especially as the alternatives are long drives to centres elsewhere. Comparison floorspace is also critical to the other towns.

9.7.2 Any further significant expansion of out of centre comparison floorspace should be in Dumfries (perhaps with the exception of the Gretna Outlet Centre).

9.7.3 *Recommendation*- that limited land for additional out of centre comparison retailing could be considered, but only for retail proposals which cannot be accommodated in the town centre, for reasons of size and format and who would otherwise not come to Dumfries. Proposals would have to be justified by a retail impact assessment. A further issue is that, if such land is allocated, there would be less reason/ no reason to consider any change in the existing restrictions at the bulky goods retail parks.

9.8 Reducing expenditure leakage

9.8.1 The level of retail expenditure leakage from Dumfries & Galloway is not a major issue at present, but there is a risk that it could increase if investment in Dumfries is not continued..

9.8.2 The NEMS household survey findings, modified to take account of the fairly recent Tesco in Annan, indicate that convenience expenditure leakage is only about 3%. This could be further reduced by the recent supermarket consent in Gretna.

9.8.3 While the leakage is higher at 15% for bulky goods and 21% for other comparison goods, the levels are moderate and there is no particular cause for concern. Development of more retail floorspace in Dumfries & Galloway will have limited success in clawing back leakage, because shoppers will always seek the greater variety and choice in larger centres.

9.8.4 There is scope for some claw back of leakage, but the main issue is probably to prevent an increase in leakage in the longer term. Dumfries is the key location, so measures to stimulate improvements in quality and range of choice of retailing will be essential. It is essential that the town centre continues to compete with other large centres outside Dumfries & Galloway.

9.8.5 *Recommendation*- that planning policies continue to promote town centres as the primary locations for new retail development. A strong focus on improving Dumfries town centre is required, including maintaining retail uses, encouraging appropriate new retail developments or shop reconfigurations, together with facilitating improvements to the streetscape and public realm generally and improvements to the traffic circulation/ parking.

9.9 Dumfries town centre regeneration

9.9.1 Maintaining and strengthening the retail offer in the town needs to be combined with regeneration measures to ensure that the town centre remains physically attractive as a destination. Failure to maintain and improve the town centre environment will deter trade and threaten the longer term viability of the town centre.

9.9.2 Market interest in major town centre retail development schemes appears negligible in the foreseeable future, so incremental improvement projects appear to be the way forward.

9.9.3 *Recommendation-* that most regeneration resources focus on Dumfries town centre to support its role as the regional shopping and service centre.

9.10 Regeneration in other town centres

9.10.1 Maintaining and improving other town centres is essential too, particularly for Stranraer as the main centre for the west of the Council area. Also, tourism is important to the smaller towns, which reinforces the importance of maintaining the town centres as attractive destinations.

9.10.2 The proposals for additional retailing in the Stranraer Waterfront Masterplan need to be reviewed against the findings of this study.

9.10.3 *Recommendation-* that regeneration initiatives continue in the other towns to support the retail and commercial offer.

9.11 Town centres and modern retail formats

9.11.1 It is a common issue with all traditional town centres that retail unit sizes often do not match modern requirements, whether by size or configuration. Conservation considerations are important to secure a high quality environment, but they have a considerable impact on the potential to adapt existing retail space to modern requirements. Where proposals emerge to adapt old town centre retail units with an appropriate solution to preserve the frontages, consideration could be given to supporting the proposals.

9.12 Supermarket floorspace

9.12.1 Superstores and supermarkets account for a considerable level of comparison floorspace in towns throughout the UK generally, including Dumfries & Galloway, as revealed in section 7. Significant levels of comparison floorspace are now an accepted part of a typical supermarket shopping experience. Customers expect it. Too much supermarket comparison floorspace can pose a threat to town centres. The aim is to achieve a balance.

9.12.2 Operator formats vary widely, but there is flexibility, depending on local circumstances. Major superstores usually have a much higher proportion of floorspace devoted to comparison goods sales, compared to mid-size supermarkets. However, the study findings do not support another superstore in Dumfries.

9.12.3 Proposals for significant extensions to the existing out of centre supermarkets, which mainly involve comparison floorspace, increase the risk of trade diversion to the nearest town centre increases.

9.12.4 *Recommendation-* limits on the proportion of comparison floorspace in new, out of centre, or edge of centre supermarket development proposals should relate to the potential impact on the town centre. Therefore the proportion of comparison floorspace in new proposals should be assessed against local circumstances, while having regard to operator formats, which can be flexible.

9.12.5 Restrictions on the range of comparison goods or services can also be negotiated. The drawback is that it can be over-complicated and difficult to enforce, and potentially unreasonable without sound evidence of ill effects on town centres.

9.13 Visitor orientated retailing

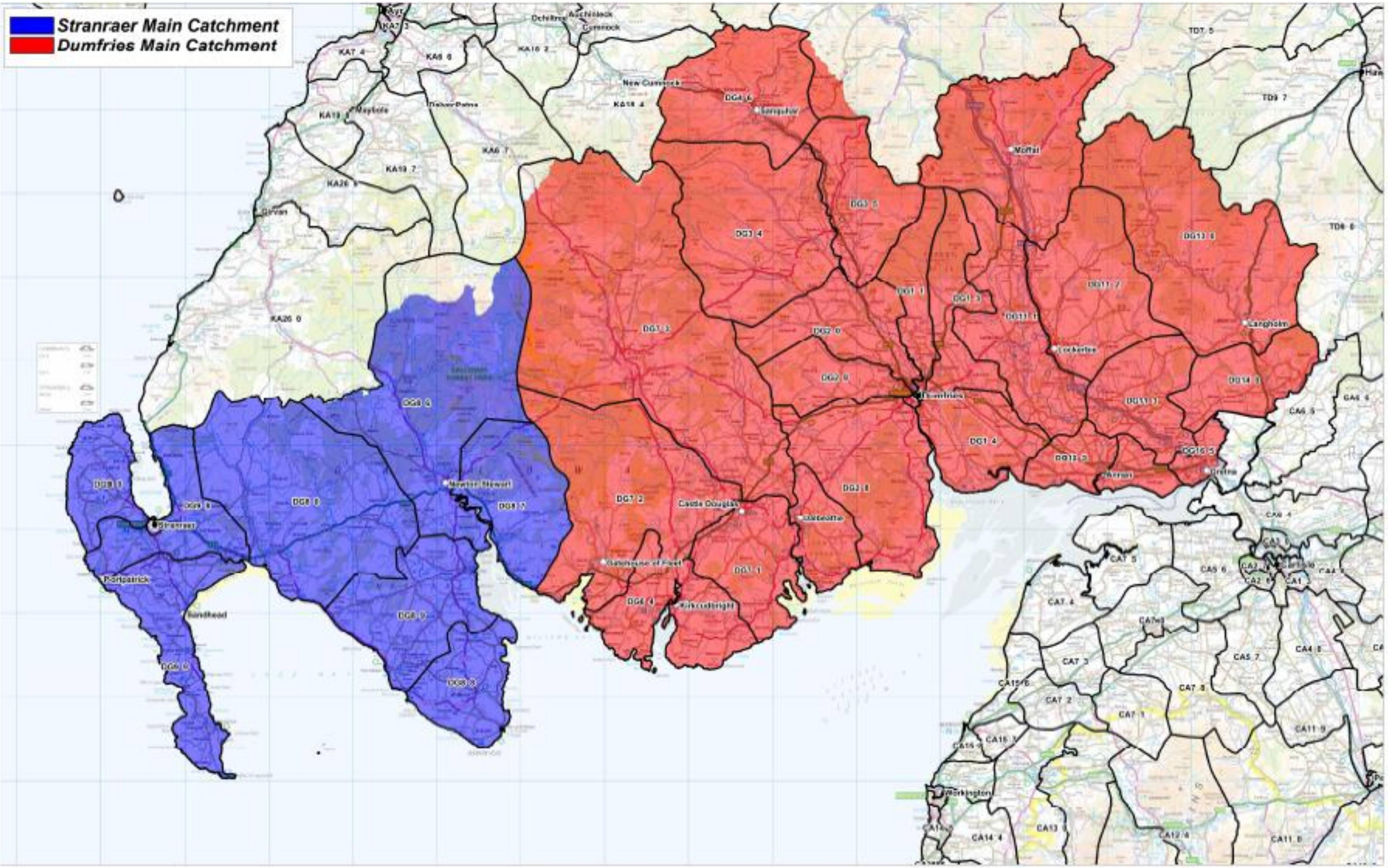
9.13.1 Given the importance of visitor retail spending to the Dumfries & Galloway economy, it will be important to maintain the quality and appearance of the town centres to attract visitors. Regeneration initiatives in the town centres will be essential to support tourism. Some visitor retailing will be associated with tourist attractions, craft workshops, farm shops etc, which are not in town centres and even in towns. There may be scope for reviewing planning policies on retailing in these locations to encourage further appropriate development.

9.13.2 The main visitor orientated retailing is at the Gretna Outlet Centre. The 2006 NEMS survey indicated that it was not a major draw for Dumfries & Galloway residents. With further expansion, this could change. It is recommended that the situation is monitored in the future.

9.13.3 That concludes the recommendations of this study.

Appendix 1

Main catchment areas- postcode sectors and population



Dumfries & Stranraer Main Retail Catchment Areas

23/07/2012

Pitney Bowes
Software

Dumfries & Galloway main retail catchment areas: population projections					
	2001 Census	2010	2012	2017	2022
Dumfries main catchment					
DG1 1	5,660				
DG1 2	2,328				
DG1 3	6,595				
DG1 4	11,511				
DG10 9 (part)	3,665				
DG11 1	4,673				
DG11 2	5,071				
DG11 3	3,104				
DG12 5	5,516				
DG12 6	6,862				
DG13 0	3,092				
DG14 0 (part)	1,381				
DG16 5	3,738				
DG2 0	7,506				
DG2 7	4,787				
DG2 8	3,919				
DG2 9	6,878				
DG3 4	2,100				
DG3 5	2,436				
DG4 6 (part); ML12 6 (part)	4,870				
DG5 4	5,405				
DG6 4	5,308				
DG7 1	5,455				
DG7 2	2,390				
DG7 3 (part)	3,994				
Sub total- Dumfries main catchment	118,244	118,584	118,668	118,298	117,588
Stranraer main catchment					
DG8 0	1,911				
DG8 6 (part)	4,267				
DG8 7	1,290				
DG8 8	2,292				
DG8 9	2,984				
DG9 0	3,766				
DG9 7	6,452				
DG9 8	4,048				
DG9 9	2,511				
Sub total- Stranraer main catchment	29,521	29,606	29,627	29,535	29,357
Total Dumfries & Galloway	147,765	148,190	148,295	147,833	146,945

Note:

Projected population change is based on the Registrar General's 2010 based population projections for Dumfries & Galloway

Appendix 2

Convenience expenditure patterns

NEMS household survey 2006

Q5 Where do you buy most of your household's food and grocery shopping							
	Origin						
	Total	Dumfries catchment				Stranraer catchment	
Destination	D&G	(Zones 1-6)	%	Zone 7	Zone 8	(Zones 7&8)	%
*Dumfries catchment shops	623	616	89%	6	1	7	4%
*Stranraer catchment shops	167	0	0%	69	98	167	95%
Outside D&G	74	73	11%	0	1	1	1%
Weighted base	882	706		76	100	176	
less: internet	5	5		0	0	0	
less: mail order		0				0	
less: other	11	10		1	0	1	
less: varies/ don't know/ don't do	2	2		0	0	0	
Adjusted base	**864**	**689**		**75**	**100**	**175**	
Deduced expenditure patterns:							
Dumfries catchment inflows	**1%**	7	div by	689			
Dumfries catchment outflows	**11%**						
Stranraer catchment inflows	**0%**						
Stranraer catchment outflows	**5%**						
Dumfries & Galloway outflows	**9%**	74	div by	864			
Note * includes 'local shops' added to 'any zone' figures							

Q9 Where do you buy your household's small scale/top up shopping							
	Origin						
	Total	Dumfries catchment				Stranraer catchment	
Destination	D&G	(Zones 1-6)	%	Zone 7	Zone 8	(Zones 7&8)	%
*Dumfries catchment shops	760	709	99%	50	1	51	23%
*Stranraer catchment shops	172	2	0%	50	120	170	77%
Outside D&G	7	6	1%	1	0	1	0%
multiple responses- total	960	736		102	122	224	
less: internet		0				0	
less: grocery van	1	1		0	0	0	
less: other	10	10		0	0	0	
less: varies/ don't know/ don't do	10	8		1	1	2	
Adjusted multiple responses	**939**	**717**		**101**	**121**	**222**	
Deduced expenditure patterns:							
Dumfries catchment inflows	**7%**	51	div by	717			
Dumfries catchment outflows	**1%**						
Stranraer catchment inflows	**0%**						
Stranraer catchment outflows	**23%**						
Dumfries & Galloway outflows	**1%**	7	div by	939			
Note * includes 'local shops' added to 'any zone' figures							

Q5, Q9 combined main food and top up: convenience shopping patterns
(Weighted on the basis of 80:20 main food: top up shopping)

	Dumfries catchment	Stranraer catchment	D&G
Inflows to:	**2%**	**0%**	
Outflows from:	9%	**8%**	**3%**
Adjusted to reduce 2006 outflow from 9% to	**4%**	following development of Tesco in Annan	

Dumfries & Galloway Telephone Household Survey for Halcrow

Q05 Where do you buy most of your household's food and grocery shopping ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Any zone 1	49.6%	438	97.9%	288	50.0%	49	19.6%	19	0.0%	0	62.3%	35	30.1%	41	6.6%	5	1.1%	1
Tesco, Cuckoo Bridge, Dumfries	29.6%	261	56.5%	166	25.6%	25	10.4%	10	0.0%	0	50.5%	28	19.5%	26	6.6%	5	0.0%	0
Morrisons, Dumfries	16.2%	143	34.8%	102	18.9%	19	5.8%	6	0.0%	0	10.5%	6	7.4%	10	0.0%	0	0.0%	0
Any zone 8	14.0%	124	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.8%	26	98.0%	98
Any zone 6	10.8%	95	1.0%	3	2.2%	2	0.0%	0	0.0%	0	0.0%	0	65.9%	89	1.5%	1	0.0%	0
Tesco, Stranraer	8.0%	71	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.7%	13	58.0%	58
Anywhere in Carlisle	7.5%	66	0.0%	0	12.1%	12	42.6%	41	46.3%	12	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Morrisons, Stranraer	5.3%	47	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.4%	10	36.8%	37
Tesco, Castle Douglas	5.0%	44	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	31.2%	42	1.5%	1	0.0%	0
Any zone 7	4.6%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	53.7%	41	0.0%	0
Any zone 3	4.4%	38	0.0%	0	4.3%	4	35.7%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Annan	4.0%	35	0.0%	0	4.3%	4	32.2%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Any zone 2	3.4%	30	0.4%	1	29.4%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Castle Douglas	2.9%	26	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.5%	24	0.0%	0	0.0%	0
Somerfield, Newton Stewart	2.6%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.7%	23	0.0%	0
Somerfield, Lockerbie	2.1%	19	0.4%	1	17.9%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Dumfries	1.8%	16	2.2%	6	4.4%	4	2.3%	2	0.0%	0	0.0%	0	1.6%	2	0.0%	0	1.1%	1
Marks & Spencer, Dumfries	1.5%	14	2.9%	8	1.1%	1	1.2%	1	0.0%	0	1.3%	1	1.6%	2	0.0%	0	0.0%	0
Any zone 4	1.3%	11	0.0%	0	0.0%	0	0.0%	0	44.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.3%	11	0.4%	1	1.1%	1	1.1%	1	2.7%	1	10.8%	6	0.0%	0	1.4%	1	0.0%	0
Co-Op, Moffat	1.2%	10	0.0%	0	10.4%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Langholm	1.1%	10	0.0%	0	0.0%	0	0.0%	0	38.8%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Somerfield, Kirkcudbright	0.9%	8	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	4.9%	7	0.0%	0	0.0%	0
Co-Op, Newton Stewart	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	7	0.0%	0
Co-Op, Wigtown	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	6	0.0%	0
Local shops	0.7%	6	0.0%	0	0.0%	0	1.1%	1	1.4%	0	2.7%	2	0.8%	1	2.9%	2	0.0%	0
Internet shopping	0.6%	5	0.0%	0	1.1%	1	0.0%	0	0.0%	0	1.3%	1	2.4%	3	0.0%	0	0.0%	0
Anywhere in Ayr	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	4	0.0%	0	0.0%	0	0.9%	1
Any zone 5	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	5	0.0%	0	0.0%	0	0.0%	0
Kinnairds, Dalbeattie	0.5%	4	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0
Small shops in Castle Douglas	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0	0.0%	0
Small shops in Kirkcudbright	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0	0.0%	0
Lidl, Stranraer	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	1.0%	1
Tesco, Auchinleck	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0
Co-Op, Kirkconnell	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0
Co-Op, Thornhill	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.0%	0
Small shops in Dalbeattie	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0
Costcutter, Annan	0.3%	2	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Kirkcudbright	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Costcutter, George Street, Whithorn	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0
Costcutter, Newton Stewart	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0
Co-Op, Dalbeattie	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Small shops in Stranraer	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Small shops in Thornhill	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Small shops in Langholm	0.2%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Annan	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small shops in Dumfries	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Whitesands, Dumfries	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Poundsavers, Whitesands, Dumfries	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small shops in Lockerbie	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small shops in Whithorn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Farmfoods, Glasgow Road, Dumfries	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small shops in Sanquhar	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Stranraer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Morrisons, Hawick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.2%	2	0.4%	1	0.0%	0	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		882		294		99		96		26		56		135		76		100
Sample:		896		277		90		88		74		75		122		75		95

Q09 Where do you buy your household's small scale / top up shopping?
Those who do top up shopping at Q08

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Tesco, Cuckoo Bridge, Dumfries	12.0%	92	30.5%	77	2.6%	2	5.3%	4	0.0%	0	8.0%	4	3.0%	3	1.5%	1	0.0%	0
Local shops	11.6%	89	9.1%	23	12.8%	11	12.7%	11	12.0%	3	22.4%	10	5.7%	7	24.6%	18	8.0%	7
Somerfield, Annan	7.2%	55	0.4%	1	5.0%	4	59.8%	50	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Dumfries	7.0%	54	19.7%	50	2.5%	2	1.3%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Small shops in Dumfries	6.9%	53	19.4%	49	5.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Dumfries	6.0%	46	17.0%	43	1.2%	1	2.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Stranraer	6.0%	46	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	4	46.4%	42
Morrisons, Stranraer	4.6%	36	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	36.9%	33
Somerfield, Lockerbie	4.3%	33	0.4%	1	37.6%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small shops in Stranraer	3.4%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	27.1%	24
Aldi, Dumfries	3.4%	26	7.5%	19	1.3%	1	5.3%	4	0.0%	0	1.6%	1	0.0%	0	1.0%	1	0.0%	0
Co-Op, Castle Douglas	3.2%	25	1.2%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.9%	22	0.0%	0	0.0%	0
Tesco, Castle Douglas	2.5%	19	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.7%	18	0.0%	0	0.0%	0
Somerfield, Newton Stewart	2.4%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.6%	18	0.0%	0
Co-Op, Wigtown	2.0%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.7%	16	0.0%	0
Co-Op, Newton Stewart	2.0%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.2%	15	0.0%	0
Co-Op, Langholm	1.9%	15	0.0%	0	0.0%	0	1.3%	1	56.2%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Moffat	1.8%	14	0.0%	0	16.3%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small shops in Castle Douglas	1.7%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.6%	13	0.0%	0	0.0%	0
Somerfield, Kirkcudbright	1.6%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	12	0.0%	0	0.0%	0
Small shops in Annan	1.6%	12	0.0%	0	1.2%	1	13.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small shops in Dalbeattie	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.3%	12	0.0%	0	0.0%	0
Lidl, Stranraer	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.1%	12
Co-Op, Dalbeattie	1.5%	12	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	11	0.0%	0	0.0%	0
Spar, Whitesands, Dumfries	1.4%	11	4.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Annan	1.3%	10	0.0%	0	0.0%	0	12.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Thornhill	1.3%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.8%	10	0.0%	0	0.0%	0	0.0%	0
Other	1.2%	10	1.7%	4	1.3%	1	0.0%	0	5.8%	1	3.3%	2	1.0%	1	0.0%	0	0.0%	0
Small shops in Langholm	1.1%	8	0.0%	0	1.2%	1	0.0%	0	24.5%	6	0.0%	0	0.0%	0	1.5%	1	0.0%	0
Small shops in Sanquhar	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.7%	7	0.0%	0	0.0%	0	1.2%	1
Small shops in Kirkcudbright	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	8	0.0%	0	0.0%	0
Costcutter, Newton Stewart	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.7%	8	0.0%	0
Lidl, Brooms Road, Dumfries	0.9%	7	2.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Small shops in Moffat	0.9%	7	0.0%	0	8.2%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Kirkcudbright	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	7	0.0%	0	0.0%	0
Farmfoods, Queensberry Street, Dumfries	0.8%	7	2.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small shops in Newton Stewart	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	6	0.0%	0
Anywhere in Carlisle	0.8%	6	0.0%	0	0.0%	0	6.4%	5	4.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Locharbriggs	0.8%	6	2.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Eastriggs	0.7%	6	0.0%	0	0.0%	0	6.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Annan	0.7%	6	0.0%	0	0.0%	0	6.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Gatehouse of Fleet	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	5	0.0%	0	0.0%	0
Small shops in Lockerbie	0.7%	5	0.0%	0	6.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Georgetown	0.7%	5	2.1%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Kirkconnell	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.4%	5	0.0%	0	0.0%	0	0.0%	0
Costcutter, Gretna	0.7%	5	0.0%	0	0.0%	0	6.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Kelloholm	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	5	0.0%	0	0.0%	0	0.0%	0
Small shops in Whithorn	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	4	0.0%	0
Farmfoods, Glasgow Road, Dumfries	0.6%	4	1.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinnairds, Dalbeattie	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	4	0.0%	0	0.0%	0
Spar, Thornhill	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.9%	4	0.0%	0	0.0%	0	0.0%	0
Costcutter, George Street, Whithorn	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	3	0.0%	0
Spar, Dalbeattie	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0	0.0%	0
Small shops in Thornhill	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	3	0.0%	0	0.0%	0	0.0%	0
Costcutter, Langholm	0.3%	2	0.0%	0	0.0%	0	0.0%	0	5.8%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Spar, Gretna	0.3%	2	0.0%	0	0.0%	0	2.5%	2	1.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-Op, Sanquhar	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	2	0.0%	0	0.0%	0	0.0%	0
Costcutter, John Street, Whithorn	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	2	0.0%	0
Spar, Castle Douglas	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Farmfoods, Stranraer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Grocery van	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Anywhere in Ayr	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loch's NISA, Stranraer	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
(Don't know / varies)	1.3%	10	1.2%	3	1.3%	1	0.0%	0	1.4%	0	1.6%	1	2.8%	3	1.0%	1	1.2%	1
Weighted base:		768		253		85		83		24		46		115		72		90
Sample:		781		238		77		76		69		62		104		70		85

Appendix 3

Comparison goods internet sales

Forecast growth rates by Oxford Economics

The high case has been applied in this study- Tables 7.1 and 7.2

Table A1
Proportions of special forms of retailing, including internet expenditure, showing forecast increases in (all) comparison goods (by Oxford Economics in Pitney Bowes Retail Expenditure Guide)

	2012	2017	2021
Central case	13.4%	14.5%	14.7%
High case	**13.8%**	**16.6%**	**17.7%**

Note:
The proportions derivefrom the *Pitney Bowes Retail Expenditure Guide 2011-12, Table 3.1 from non-store retail sales- broad definition*

Table A2
Deducing the proportion of bulky goods special forms of retailing

The 2008 SFR proportions for bulky goods derive from the Pitney Bowes Retail AnySite Explanatory Guide 2010-11.
The %s for *all bulky goods* are based on applying weighting from the UK expenditure per capita from the Explanatory Guide 2010-11-see below:

Weighted averages-derivation of the %s for bulky goods	(SPF) % P Bowes %	2008 UK exp £ per cap	multiplied
Furniture/floorcoverings/ soft furnishings	5.1%	377	19.2
Domestic appliances & 50% of audio vis & phones	10.6%	268	28.4
DIY repair and maintenance	9.2%	116	10.7
Tools	14.6%	85	12.4
Garden plants	11.5%	63	7.2
Bulky goods average	**8.6%**	**909**	**78.0**
All comparison goods (2008)	**7.4%**	**3051**	**225.8**
Ratio of bulky goods to all comparison=	**1.16**		
Capacity Study assumes an annual increase at the same rate as all comparison goods			
Other comparison goods	**6.9%**	**2142.0**	**147.8**
Ratio of other comparison goods to all comparison=	**0.93**		

Table A3
Proportions of special forms of retailing, including internet expenditure, showing forecast increases in both comparison and bulky goods (by Oxford Economics in Pitney Bowes Retail Expenditure Guide)

High forecast	2012		2017	2021	*2022*
Bulky goods	16.0%		19.2%	20.5%	20.8%
Other comparison goods	12.9%		15.5%	16.5%	16.7%
All comparison goods	13.8%		16.6%	17.7%	*17.9%*

Appendix 4

Bulky goods and other comparison goods shopping patterns- NEMS household survey, plus an allowance for visitor spending

Q19 Town centre or retail park where spend most on domestic appliances, TV,HiFi, computers etc

Destination	*Origin* Total D&G	Dumfries catchment (Zones 1-6)	%	Zone 7	Zone 8	Stranraer catchment (Zones 7&8)	%
Dumfries catchment shops	558	510	86%	45	3	48	31%
Stranraer catchment shops	99	0	0%	17	82	99	63%
Outside D&G	96	86	14%	1	9	10	6%
Weighted base	882	706		76	100	176	
less: internet	40	32		6	2	8	
less: mail order	11	7		3	1	4	
less: other	4	4		0	0	0	
less: varies/ don't know/ don't do	74	67		4	3	7	
Adjusted base	**753**	**596**		**63**	**94**	**157**	
Deduced expenditure patterns:							
Dumfries catchment inflows	**8%**	48	div by	596			
Dumfries catchment outflows	**14%**						
Stranraer catchment inflows	**0%**						
Stranraer catchment outflows	**37%**						
Dumfries & Galloway outflows	**13%**	96	div by	753			

Q21 Town centre or retail park where spend most on furniture, soft furnishings and floorcoverings

Destination	*Origin* Total D&G	Dumfries catchment (Zones 1-6)	%	Zone 7	Zone 8	Stranraer catchment (Zones 7&8)	%
Dumfries catchment shops	515	465	81%	48	2	50	36%
Stranraer catchment shops	72	1	0%	11	60	71	51%
Outside D&G	127	110	19%	4	13	17	12%
Weighted base	882	706		76	100	176	
less: internet	7	5		1	1	2	
less: mail order	13	6		4	3	7	
less: other	6	5		0	1	1	
less: varies/ don't know/ don't do	142	114		8	20	28	
Adjusted base	**714**	**576**		**63**	**75**	**138**	
Deduced expenditure patterns:							
Dumfries catchment inflows	**9%**	50	div by	576			
Dumfries catchment outflows	**19%**						
Stranraer catchment inflows	**0%**						
Stranraer catchment outflows	**49%**						
Dumfries & Galloway outflows	**18%**	127	div by	714			

Q23 Town centre or retail park where spend most on DIY, hardware and garden items

	Origin						
	Total	Dumfries catchment				Stranraer catchment	
Destination	D&G	(Zones 1-6)	%	Zone 7	Zone 8	(Zones 7&8)	%
Dumfries catchment shops	601	543	88%	55	3	58	36%
Stranraer catchment shops	82	0	0%	12	70	82	51%
Outside D&G	93	73	12%	3	17	20	13%
Weighted base	882	706		76	100	176	
less: internet	5	3		1	1	2	
less: mail order	5	5		0	0	0	
less: other	11	9		2	0	2	
less: varies/ don't know/ don't do	85	73		3	9	12	
Adjusted base	**776**	**616**		**70**	**90**	**160**	
Deduced expenditure patterns:							
Dumfries catchment inflows	**9%**	58	div by	616			
Dumfries catchment outflows	**12%**						
Stranraer catchment inflows	**0%**						
Stranraer catchment outflows	**49%**						
Dumfries & Galloway outflows	**12%**	93	div by	776			

Q17 Town centre or retail park where spend most on clothes and shoes

	Origin						
	Total	Dumfries catchment				Stranraer catchment	
Destination	D&G	(Zones 1-6)	%	Zone 7	Zone 8	(Zones 7&8)	%
Dumfries catchment shops	487	442	67%	41	4	45	30%
Stranraer catchment shops	53	1	0%	14	38	52	34%
Outside D&G	269	215	33%	11	43	54	36%
Weighted base	882	706		76	100	176	
less: internet	10	5		1	4	5	
less: mail order	29	15		6	8	14	
less: other	9	5		1	3	4	
less: varies/ don't know/ don't do	25	23		2	0	2	
Adjusted base	**809**	**658**		**66**	**85**	**151**	
Deduced expenditure patterns:							
Dumfries catchment inflows	**7%**	45	div by	658			
Dumfries catchment outflows	**33%**						
Stranraer catchment inflows	**0%**						
Stranraer catchment outflows	**66%**						
Dumfries & Galloway outflows	**33%**	269	div by	809			

Q25 Town centre or retail park where spend most on health, beauty and chemist items

Destination	*Origin* Total D&G	Dumfries catchment (Zones 1-6)	%	Zone 7	Zone 8	Stranraer catchment (Zones 7&8)	%
Dumfries catchment shops	624	566	91%	55	3	58	35%
Stranraer catchment shops	106	0	0%	14	92	106	64%
Outside D&G	60	58	9%	1	1	2	1%
Weighted base	882	706		76	100	176	
less: internet	3	2		1	0	1	
less: mail order	9	7		2	0	2	
less: other	16	14		0	2	2	
less: varies/ don't know/ don't do	64	59		3	2	5	
Adjusted base	**790**	**624**		**70**	**96**	**166**	
Deduced expenditure patterns:							
Dumfries catchment inflows	**9%**	58	div by	624			
Dumfries catchment outflows	**9%**						
Stranraer catchment inflows	**0%**						
Stranraer catchment outflows	**36%**						
Dumfries & Galloway outflows	**8%**	60	div by	790			

Q27 Town centre or retail park where spend most on non-food items, such as books, CDs, toys and gifts

Destination	*Origin* Total D&G	Dumfries catchment (Zones 1-6)	%	Zone 7	Zone 8	Stranraer catchment (Zones 7&8)	%
Dumfries catchment shops	491	453	83%	35	3	38	25%
Stranraer catchment shops	94	0	0%	22	72	94	62%
Outside D&G	108	93	17%	6	9	15	10%
Weighted base	882	706		76	100	176	
less: internet	72	59		5	8	13	
less: mail order	22	18		3	1	4	
less: other	9	7		1	1	2	
less: varies/ don't know/ don't do	86	76		4	6	10	
Adjusted base	**693**	**546**		**63**	**84**	**147**	
Deduced expenditure patterns:							
Dumfries catchment inflows	**7%**	38	div by	546			
Dumfries catchment outflows	**17%**						
Stranraer catchment inflows	**0%**						
Stranraer catchment outflows	**35%**						
Dumfries & Galloway outflows	**16%**	108	div by	693			

Q19, Q21, Q23 combined: Bulky goods shopping patterns *weighted by per capita expenditure- see below*			
	Dumfries catchment	Stranraer catchment	D&G
Inflows to:	9%	0%	
Outflows from:	16%	45%	15%

Q17 ,Q25, Q27 combined: Other comparison goods shopping patterns *weighted by per capita expenditure- see below*			
	Dumfries catchment	Stranraer catchment	D&G
Inflows to:	7%	0%	
Outflows from:	22%	47%	21%

	Weighting P Bowes expenditure per capita Survey area 2010	
	£	
Bulky goods		
domestic appliances and 50% of other audi visual	224	28%
furniture; soft furnishings & floorcoverings	348	43%
DIY/ hardware less china/ glass	233	29%
Sub total bulky goods	805	100%
Other comparison goods		
clothing	732	37%
chemists	340	17%
other goods, plus part audio vis and glass/china	887	45%
Sub total other comparison goods	1,959	100%
All comparison goods	2,763	

Allowance for visitor spending on comparison goods in Dumfries & Galloway		
*Expenditure by UK tourists in Dumfries & Galloway in 2010	£122 million	
**Proportions spent on clothes shopping and other shopping	14%	
***Apply a split of 10% convenience goods and 90% comparison goods		
Deduced proportion spent on comparison shopping	12.6%	£million
Value of spend on comparison shopping (£122m * 12.6%)	£15.4 million	**15.4**
Assume the above relates to the 'other comparison goods' category only		
		****
		As % of catchment
Assume the split between the two main catchment areas, based on the		expenditure 2012
total 'other comparison' turnover at average levels in Tables 7.5 and 7.6	£million	
Dumfries main catchment visitor expenditure (87%)	13.4	**6%**
Stranraer main catchment visitor expenditure (13%)	2.0	**4%**
Total	15.4	
Note		
* Visit Scotland research - *Tourism in Southern Scotland 2010 - Dumfries & Galloway data*		
** UK Tourist Survey- Statistics 2010		
*** Estimate by Drivers Jonas in other studies		
**** From 'other comparison goods' catchment expenditure potential in each catchment		
Add: notional 2% visitor spending on other comparison goods at Gretna Outlet	**Grand total**	**8%**

Q17 In which town centre or retail park does your household spend most money on clothes and shoes ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Dumfries Town Centre	39.4%	348	56.3%	166	36.9%	37	21.9%	21	5.3%	1	39.9%	22	52.2%	70	37.3%	28	2.2%	2
Carlisle	17.0%	150	16.4%	48	26.3%	26	53.1%	51	69.0%	18	1.3%	1	3.4%	5	1.5%	1	0.0%	0
Ayr	6.4%	57	1.1%	3	0.0%	0	0.0%	0	0.0%	0	21.5%	12	2.4%	3	6.2%	5	33.5%	33
Stranraer	6.0%	53	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.8%	14	38.3%	38
Dumfries Peel Centre, Lockerbie Rd (Matalan etc)	5.7%	51	6.8%	20	6.7%	7	5.8%	6	0.0%	0	7.9%	4	7.2%	10	5.7%	4	0.0%	0
Glasgow	4.9%	44	5.1%	15	4.5%	4	3.4%	3	0.0%	0	2.6%	1	4.1%	6	5.7%	4	9.4%	9
Castle Douglas	3.8%	34	2.2%	6	1.1%	1	1.1%	1	0.0%	0	1.3%	1	18.2%	25	0.0%	0	0.0%	0
Mail order	3.2%	29	2.2%	6	2.2%	2	1.1%	1	0.0%	0	4.0%	2	1.6%	2	8.1%	6	8.4%	8
Dumfries Cuckoo Bridge (Tesco Extra, Homebase etc)	1.8%	16	2.9%	9	2.2%	2	0.0%	0	0.0%	0	5.3%	3	0.9%	1	1.4%	1	0.0%	0
Edinburgh	1.4%	12	0.4%	1	4.4%	4	0.0%	0	0.0%	0	4.0%	2	1.6%	2	1.4%	1	1.0%	1
Internet	1.2%	10	0.4%	1	2.3%	2	0.0%	0	2.7%	1	1.4%	1	0.0%	0	1.4%	1	4.3%	4
Other	1.0%	9	1.0%	3	0.0%	0	0.0%	0	0.0%	0	4.1%	2	0.0%	0	1.0%	1	3.0%	3
Gretna Factory Outlet Centre	0.9%	8	1.5%	4	2.2%	2	0.0%	0	5.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Annan	0.8%	7	0.0%	0	0.0%	0	6.9%	7	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newton Stewart	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	6	0.0%	0
Dumfries Retail Park (Focus, Comet Curry etc)	0.6%	5	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	1.0%	1	0.0%	0
Gretna Town Centre	0.4%	4	0.0%	0	1.1%	1	2.2%	2	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thornhill	0.4%	4	0.3%	1	1.1%	1	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Dumfries Town Centre Market	0.3%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcudbright	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
East Kilbride	0.2%	2	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.9%	1	0.0%	0	0.0%	0
Newcastle / Gateshead	0.2%	1	0.0%	0	0.0%	0	1.1%	1	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moffat	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Langholm	0.1%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kilmarnock	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
(Don't do this kind of shopping)	1.5%	13	1.0%	3	2.3%	2	2.3%	2	2.7%	1	0.0%	0	2.5%	3	2.4%	2	0.0%	0
(Don't know / varies)	1.3%	12	1.0%	3	3.4%	3	1.1%	1	5.4%	1	1.3%	1	1.6%	2	0.0%	0	0.0%	0
Weighted base:		882		294		99		96		26		56		135		76		100
Sample:		896		277		90		88		74		75		122		75		95

by Zone (weighted)
Weighted:
Dumfries & Galloway Telephone Household Survey
for Halcrow

Q19 In which town centre or retail park does your household spend most money on domestic electric appliances such as fridges and kitchen items, TV, Hi-Fi, computers, e

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Dumfries Retail Park (Focus, Comet Curry etc)	26.9%	237	37.9%	111	27.8%	28	23.0%	22	2.7%	1	23.9%	13	27.1%	37	32.0%	24	0.9%	1
Dumfries Town Centre	19.3%	171	29.1%	86	22.3%	22	2.3%	2	2.7%	1	9.2%	5	36.6%	49	7.1%	5	0.0%	0
Stranraer	11.3%	99	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.3%	17	82.3%	82
Dumfries Cuckoo Bridge (Tesco Extra, Homebase etc)	10.1%	89	15.6%	46	11.2%	11	6.9%	7	0.0%	0	15.9%	9	5.8%	8	10.1%	8	1.1%	1
Carlisle	8.9%	78	0.8%	2	17.3%	17	42.5%	41	66.3%	17	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Internet	4.5%	40	4.8%	14	6.8%	7	1.2%	1	4.0%	1	1.3%	1	5.9%	8	8.1%	6	2.0%	2
Annan	1.5%	13	0.0%	0	0.0%	0	12.7%	12	2.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mail order	1.2%	11	1.1%	3	1.2%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	2	4.2%	3	0.9%	1
Dalbeattie	1.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	9	0.0%	0	0.0%	0
Dumfries Peel Centre, Lockerbie Rd (Matalan etc)	1.0%	8	1.4%	4	1.1%	1	1.1%	1	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0
Glasgow	0.8%	7	0.7%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	3.0%	3
Ayr	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	6.5%	6
Sanquhar	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	5	0.0%	0	1.4%	1	0.0%	0
Newton Stewart	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	6	0.0%	0
Langholm	0.4%	4	0.0%	0	0.0%	0	1.2%	1	10.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkconnell	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	4	0.0%	0	0.0%	0	0.0%	0
Other	0.4%	4	0.4%	1	0.0%	0	0.0%	0	1.4%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0
Castle Douglas	0.4%	3	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0
Kelloholm	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0	0.0%	0
Edinburgh	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.4%	1	0.0%	0
Kilmarnock	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Lockerbie	0.2%	2	0.0%	0	1.2%	1	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thornhill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0
Moffat	0.1%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcudbright	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Dumfries Town Centre Market	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't do this kind of shopping)	7.0%	62	6.6%	19	6.6%	7	8.0%	8	5.4%	1	13.2%	7	9.9%	13	5.2%	4	2.1%	2
(Don't know / varies)	1.4%	12	1.1%	3	2.2%	2	1.1%	1	2.7%	1	2.7%	2	1.6%	2	0.0%	0	1.1%	1
Weighted base:		882		294		99		96		26		56		135		76		100
Sample:		896		277		90		88		74		75		122		75		95

Q21 In which town centre or retail park does your household spend most money on furniture, soft furnishings and floor-coverings ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Dumfries Town Centre	27.3%	241	42.2%	124	27.8%	28	13.8%	13	1.3%	0	19.8%	11	42.4%	57	8.1%	6	1.1%	1
Dumfries Retail Park (Focus, Comet Curry etc)	12.1%	107	16.2%	48	12.4%	12	5.7%	6	4.1%	1	12.0%	7	12.5%	17	21.0%	16	1.1%	1
Carlisle	9.7%	85	6.1%	18	17.4%	17	38.0%	37	39.3%	10	0.0%	0	2.5%	3	0.0%	0	0.0%	0
Dumfries Cuckoo Bridge (Tesco Extra, Homebase etc)	8.9%	78	14.9%	44	3.3%	3	11.5%	11	0.0%	0	10.6%	6	7.3%	10	5.7%	4	0.0%	0
Stranraer	8.2%	72	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.1%	11	60.5%	60
Ayr	2.3%	21	0.0%	0	3.3%	3	0.0%	0	0.0%	0	6.8%	4	0.8%	1	3.8%	3	9.6%	10
Annan	1.7%	15	0.0%	0	6.6%	7	9.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newton Stewart	1.7%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.8%	15	0.0%	0
Castle Douglas	1.5%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	13	1.4%	1	0.0%	0
Langholm	1.5%	13	0.0%	0	0.0%	0	2.3%	2	41.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mail order	1.4%	13	0.7%	2	1.1%	1	1.2%	1	0.0%	0	0.0%	0	0.8%	1	5.6%	4	2.9%	3
Glasgow	1.0%	9	0.7%	2	2.3%	2	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0	3.2%	3
Edinburgh	0.9%	8	1.1%	3	1.2%	1	0.0%	0	1.3%	0	1.3%	1	0.9%	1	1.4%	1	0.0%	0
Internet	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	3.4%	5	1.4%	1	0.9%	1
Sanquhar	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	7	0.0%	0	0.0%	0	0.0%	0
Eastriggs	0.7%	7	0.0%	0	1.1%	1	5.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.7%	6	0.4%	1	2.2%	2	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0	0.9%	1
Kirkconnell	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.1%	5	0.0%	0	0.0%	0	0.0%	0
Newcastle / Gateshead	0.5%	4	0.4%	1	1.1%	1	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dalbeattie	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	4	0.0%	0	0.0%	0
Port William	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	4	0.0%	0
Dumfries Town Centre Market	0.4%	3	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dumfries Peel Centre, Lockerbie Rd (Matalan etc)	0.2%	2	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Gretna Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't do this kind of shopping)	14.4%	127	13.7%	40	18.0%	18	10.4%	10	9.4%	2	19.9%	11	17.1%	23	10.0%	8	14.6%	15
(Don't know / varies)	1.7%	15	2.5%	7	1.1%	1	0.0%	0	1.3%	0	1.4%	1	0.0%	0	0.0%	0	5.2%	5
Weighted base:		882		294		99		96		26		56		135		76		100
Sample:		896		277		90		88		74		75		122		75		95

Q23 In which town centre or retail park does your household spend most money on DIY / hardware and garden items ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Dumfries Cuckoo Bridge (Tesco Extra, Homebase etc)	26.7%	236	41.8%	123	30.0%	30	17.3%	17	2.7%	1	37.2%	21	24.3%	33	16.2%	12	0.0%	0
Dumfries Town Centre	16.5%	145	23.2%	68	19.8%	20	9.1%	9	4.1%	1	14.6%	8	23.7%	32	7.1%	5	2.2%	2
Dumfries Retail Park (Focus, Comet Curry etc)	10.6%	94	17.1%	50	7.8%	8	5.7%	5	1.4%	0	8.0%	4	11.7%	16	12.4%	9	0.0%	0
Stranraer	9.3%	82	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.1%	12	69.5%	70
Carlisle	7.3%	64	0.7%	2	9.7%	10	35.8%	34	64.9%	17	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Castle Douglas	3.8%	33	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	22.5%	30	1.4%	1	0.0%	0
Ayr	2.8%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	4	2.4%	3	2.5%	2	15.7%	16
Newton Stewart	2.6%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.5%	23	0.0%	0
Annan	1.5%	13	0.0%	0	2.1%	2	11.5%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hetland garden centre, Dumfries	1.4%	13	1.5%	4	1.1%	1	6.8%	7	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Other	1.3%	11	1.4%	4	1.1%	1	2.3%	2	0.0%	0	2.7%	2	0.0%	0	2.8%	2	0.0%	0
Garden centre, Dumfries (unspecified location)	0.8%	7	1.0%	3	4.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Garden centre, Heath Hall (unspecified location)	0.8%	7	1.0%	3	1.2%	1	1.1%	1	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Gardenwise, Dumfries	0.6%	6	1.4%	4	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Internet	0.6%	5	0.4%	1	1.1%	1	0.0%	0	1.3%	0	1.3%	1	0.0%	0	1.4%	1	1.0%	1
Mail order	0.6%	5	0.7%	2	2.3%	2	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Dalbeattie	0.5%	4	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0
Sanquhar	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.4%	3	0.0%	0	0.0%	0	1.0%	1
Wigtown	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	3	0.0%	0
Langholm	0.4%	3	0.0%	0	0.0%	0	0.0%	0	12.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moffat	0.3%	2	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh	0.3%	2	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Lockerbie	0.2%	2	0.4%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dumfries Peel Centre, Lockerbie Rd (Matalan etc)	0.2%	2	0.4%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newcastle / Gateshead	0.2%	1	0.0%	0	0.0%	0	1.1%	1	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gretna Town Centre	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Thornhill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
(Don't do this kind of shopping)	9.4%	83	8.3%	24	12.5%	12	6.9%	7	10.7%	3	16.1%	9	11.4%	15	3.9%	3	9.4%	9
(Don't know / varies)	0.2%	2	0.0%	0	1.1%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		882		294		99		96		26		56		135		76		100
Sample:		896		277		90		88		74		75		122		75		95

Q25 In which town centre or retail park does your household spend most money on health, beauty and chemist items ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Dumfries Town Centre	37.7%	332	74.2%	218	30.0%	30	12.7%	12	5.4%	1	45.1%	25	29.1%	39	8.0%	6	0.0%	0
Stranraer	12.1%	106	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.0%	14	92.6%	93
Dumfries Cuckoo Bridge (Tesco Extra, Homebase etc)	7.5%	66	11.6%	34	8.9%	9	2.3%	2	0.0%	0	13.3%	7	9.0%	12	1.4%	1	0.0%	0
Carlisle	6.1%	54	0.3%	1	8.7%	9	32.5%	31	48.9%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Castle Douglas	5.4%	47	0.4%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	33.5%	45	0.0%	0	0.0%	0
Annan	4.6%	41	0.0%	0	4.3%	4	38.0%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newton Stewart	4.0%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	46.4%	35	0.0%	0
Other	1.8%	16	0.7%	2	4.3%	4	2.3%	2	4.1%	1	1.4%	1	2.6%	4	0.0%	0	2.0%	2
Moffat	1.3%	12	0.0%	0	11.7%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcudbright	1.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.2%	11	0.0%	0	0.0%	0
Dalbeattie	1.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.0%	11	0.0%	0	0.0%	0
Lockerbie	1.1%	10	0.0%	0	10.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mail order	1.0%	9	1.1%	3	2.3%	2	0.0%	0	2.7%	1	1.3%	1	0.0%	0	2.4%	2	0.0%	0
Langholm	1.0%	9	0.0%	0	0.0%	0	0.0%	0	29.5%	8	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Sanquhar	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.5%	5	0.0%	0	0.0%	0	2.1%	2
Wigtown	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	7	0.0%	0
Gretna Town Centre	0.8%	7	0.0%	0	0.0%	0	6.5%	6	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lochmaben	0.7%	6	0.0%	0	6.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dumfries Town Centre Market	0.6%	5	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Thornhill	0.5%	4	0.4%	1	0.0%	0	0.0%	0	0.0%	0	5.4%	3	0.0%	0	0.0%	0	0.0%	0
Kirkconnell	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	4	0.0%	0	0.0%	0	0.0%	0
Ayr	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	1.0%	1	1.1%	1
Gatehouse of Fleet	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	1.5%	1	0.0%	0
Internet	0.4%	3	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	1.5%	1	0.0%	0
Whithorn	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	3	0.0%	0
Morrisons, Dumfries	0.3%	3	0.7%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Edinburgh	0.2%	2	0.0%	0	1.2%	1	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cumnock	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
(Don't do this kind of shopping)	6.5%	57	8.0%	23	9.9%	10	4.6%	4	5.3%	1	9.4%	5	5.6%	8	4.3%	3	2.1%	2
(Don't know / varies)	0.8%	7	1.1%	3	1.1%	1	1.1%	1	1.3%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Weighted base:		882		294		99		96		26		56		135		76		100
Sample:		896		277		90		88		74		75		122		75		95

Q27 In which town centre or retail park does your household spend most money on other non-food items such as books, CD's, toys and gifts ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
Dumfries Town Centre	38.1%	336	63.5%	187	36.0%	36	17.3%	17	2.7%	1	47.8%	27	37.4%	51	22.5%	17	2.1%	2
Stranraer	10.7%	94	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	29.2%	22	71.9%	72
Carlisle	8.2%	72	1.8%	5	17.4%	17	32.6%	31	62.3%	16	1.3%	1	0.0%	0	1.5%	1	0.0%	0
Internet	8.1%	72	6.1%	18	6.8%	7	9.1%	9	9.5%	2	6.6%	4	13.8%	19	6.6%	5	8.3%	8
Dumfries Cuckoo Bridge (Tesco Extra, Homebase etc)	7.3%	64	10.2%	30	11.0%	11	3.5%	3	0.0%	0	12.1%	7	5.6%	8	7.2%	5	0.0%	0
Castle Douglas	4.3%	38	1.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.0%	34	0.0%	0	0.0%	0
Mail order	2.5%	22	2.6%	8	1.1%	1	3.4%	3	1.4%	0	5.4%	3	1.7%	2	4.3%	3	1.0%	1
Ayr	1.6%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	4	1.7%	2	3.4%	3	5.3%	5
Annan	1.4%	12	0.0%	0	0.0%	0	12.6%	12	1.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow	1.3%	11	0.4%	1	2.3%	2	1.1%	1	0.0%	0	2.7%	2	0.0%	0	1.4%	1	4.4%	4
Edinburgh	1.1%	10	1.5%	4	2.2%	2	0.0%	0	1.3%	0	1.3%	1	0.8%	1	1.4%	1	0.0%	0
Other	1.0%	9	0.4%	1	4.3%	4	0.0%	0	0.0%	0	1.4%	1	0.9%	1	1.0%	1	0.9%	1
Gretna Factory Outlet Centre	1.0%	9	0.0%	0	2.2%	2	5.7%	5	4.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newton Stewart	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	8	0.0%	0
Moffat	0.5%	5	0.0%	0	4.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dumfries Retail Park (Focus, Comet Curry etc)	0.5%	4	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Kirkcudbright	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3	0.0%	0	0.0%	0
Wigtown	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	3	0.0%	0
Gretna Town Centre	0.2%	2	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dumfries Peel Centre, Lockerbie Rd (Matalan etc)	0.2%	2	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Thornhill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0	0.0%	0
Langholm	0.2%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newcastle / Gateshead	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dalbeattie	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Dumfries Town Centre Market	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't do this kind of shopping)	8.3%	73	8.9%	26	10.0%	10	8.1%	8	10.7%	3	10.7%	6	8.1%	11	5.7%	4	5.0%	5
(Don't know / varies)	1.5%	13	1.8%	5	2.2%	2	2.2%	2	1.3%	0	1.4%	1	0.8%	1	0.0%	0	1.0%	1
Weighted base:		882		294		99		96		26		56		135		76		100
Sample:		896		277		90		88		74		75		122		75		95

Appendix 5

Dumfries retail parks and comparison turnover in the supermarkets

Dumfries Retail Parks: floorspace and turnover, 2012 (in 2010 prices)				
	Floorspace sq m		Turnover	Turnover
	gross	net	ratio £/sq m	£million
Cuckoo Bridge Retail Park				
(B) Dreams- beds/ furniture-unit 7b	697	558	2,151	1.2
(B) Laura Ashley Home - wallpaper, furnishings-unit	697	558	2,921	1.6
(B) Storey Carpets-unit 4	929	743	937	0.7
(B) Dunelm Mill- soft furnishings- unit 2	1,883	1,506	2,236	3.4
(B) Homebase- DIY-unit1	4,645	3,716	1,209	4.5
units 3,6,7A are vacant- total 3,010 sq m gross				
Total occupied	8,851	7,081		11.4
Dumfries Retail Park				
Carphone Warehouse	210	168	13,393	2.3
(B) Currys	1,256	1,005	5,864	5.9
(B) Comet	1,115	892	6,327	5.6
(B) Carpetright	929	743	1,056	0.8
(B) Wickes	2,600	2,080	2,365	4.9
2 vacant units- total 2,063 sq m gross				
Total occupied	6,110	4,888		19.5
Peel Centre				
B&M- food, tools, soft furnishings etc-unit 7	700	560	6,214	3.5
TK Maxx- clothes, shoes, housewares- units5/6	1,625	1,300	2,675	3.5
JJB Sports-unit 4 (929 sq m- recently closed)				
Brantano- shoes- unit 2	697	558	1,433	0.8
Pets at Home- unit 3	697	558	3,820	2.1
Matalan- clothing etc- unit 1	2,962	2,370	2,164	5.1
1 undeveloped freestanding unit (288 sq m gross)				
Total occupied	6,681	5,345		15.0
Grand total-all comparison goods	**21,642**	**17,314**		**45.9**
Bulky goods	**14,751**	**11,801**		**28.6**
Other comparison goods	**6,891**	**5,513**		**17.3**

Sources:
Recent Council note of occupiers.
Floorspace: Cuckoo Bridge- Wilkinson Williams agents/Council. Dumfries RP-ASW agents/ Council. Peel Centre- Egi/Aviva
Turnover ratios based on the average company levels in the Retail Rankings 2012
(B) refers to bulky goods retailers. The rest are 'other comparison goods' retailers

Comparison floorspace in supermarkets				
	Floorspace sq m		Average turnover levels	Turnover
	gross	net	£ per sq m	£million
Dumfries				
Tesco, Lockerbie Rd (5,560 sq m gross 25% comp)	1,390	904	6,244	5.6
Morrisons, Brooms Rd- extended: (3,757sqm gross-10% comp)	376	207	7,332	1.5
Aldi, Annan Rd -extended: (1,511 sq m gross- 15% comp)	227	159	2,008	0.3
Lidl, Brooms Rd (1,700 sq m gross-15% comp)	255	179	2,008	0.4
Tesco, Cuckoo Bridge (8,147 sq m gross-35% comp)	2,851	1,951	6,244	12.2
Sub total Dumfries	5,099	3,399		20.0
Lockerbie				
Tesco, Goods Station Rd (4,319 sq m gross-20% comp)	864	518	6,244	3.2
Annan				
Tesco, Watchhall (4,230 sq m gross-20% comp)	846	508	6,244	3.2
Castle Douglas				
Tesco, Ernespie Rd (2,800 sq m gross-10% comp)	280	168	6,244	1.0
Total Dumfries catchment area	**7,089**	**4,593**		**27.5**
Stranraer				
Morrisons (3,586 sq m gross-90% conv)	359	197	7,332	1.4
Aldi, Newton Stewart (1,570 sq m gross-85% conv)	236	169	2,008	0.3
Total Stranraer catchment area	**594**	**366**		**1.8**

Cuckoo Bridge Retail Park- restricted to the sale of bulky goods only

Condition 9 of 00/P/30166

The primary use of each of the retail units shall be the sale of bulky goods (e.g. DIY, hardware, furniture, carpets, electrical and gardening goods), and not the sale of clothing, footwear, toys, sports goods/ sportswear, pets/pet products, books or newspapers/magazines. The net retail floorspace of any electrical unit shall not exceed 910sq.m. and no more than one such unit should be permitted within the development.

There is also a further condition

Condition 17 of 00/P/30166

No retail unit or franchise area or other form of retailing which could reasonably be construed as an independent activity within any individual retail unit shall have a gross floor area of less than 697sq.m.