Perth & Kinross Council

Roderick MacLean Associates Ltd

Planning & Development Consultancy

Auchterarder Retail Study

Final Report

May 2013

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1 Introduction and scope

1.1 Study Brief

1.1.1 **Roderick MacLean Associates Ltd** was appointed by Perth & Kinross Council in January 2013 to prepare the Auchterarder Retail Study.

1.1.2 The consultants' brief states that the main purpose of the study is to assess the current retail performance of Auchterarder and the potential for an additional foodstore.

1.1.3 The scope of services quoted in the brief includes the following elements:

- Provide information on consumers' views and use of Auchterarder town centre
- Identify likely trends in food retailing and its implications for Auchterarder
- Identify any shortfalls and opportunities for food retail provision in Auchterarder
- Examine potential sites for any future foodstore.

1.1.4 Under the scope, the study should provide:

- Identification of the catchment area, including application of a household shopping survey to identify main food and top-up shopping patterns, among other aspects;
- Identify convenience and comparison retail floorspace in Auchterarder;
- Prepare a quantitative retail capacity study with a focus on convenience capacity;
- Undertake a qualitative assessment of the potential for another foodstore, drawing on the household survey findings on patterns and public perceptions;
- Undertake a health check to measure the vitality and viability of the town centre- applying performance indicators which include market indicators, vitality indicators, including a pedestrian flow survey and qualitative indicators; and
- Scenario testing to assess the impact of introducing an additional foodstore (in centre/ out of centre), plus a review of various site opportunities under the sequential test.

1.2 Capacity forecasts

1.2.1 Forecasts of spare retail expenditure capacity for five and ten years ahead are provided i.e. for **2013-18** and for **2013-23** relating to the primary catchment area of Auchterarder. The brief also sought forecasts up to 2028, but capacity forecasts beyond ten years are likely to be highly unreliable, so they have not been included. It is preferable to monitor the forecasts every five years, rather than present very long term forecasts.

1.2.2 All values are expressed in constant **2011 prices**, which accords with the latest published Pitney Bowes retail data baseline (price bases in retail studies are always a year or two behind). The expenditure forecasts are converted to equivalent retail floorspace, to assist interpretation. The tables in this report are Excel based, with rounded figures.

1.3 Surveys

1.3.1 In accordance with the study brief, a *household telephone interview survey* (500 sample) was undertaken in the wider area around Auchterarder to assist determination of the primary catchment area, identify shopping patterns and collect views on shopping and foodstore provision in the town.

1.3.2 The survey was undertaken by NEMS Market Research. Their report, showing the questions and distribution of responses by zone, has been provided separately to the Council.

1.3.3 A *pedestrian flow count* was undertaken in Auchterarder town centre by PMRS Ltd. This information contributes to the Town Centre Health Check in this study. A copy of the PMRS report has been provided separately to the Council.

1.3.4 *Retail market information* for Aucherarder, including transactions, rents and yields, was provided by Ryden, also as part of the Health Check.

Co-op

Jan de Vries-health foods

Howie- butcher

Sugar & Spice- baker

Ellies Cellar- wines

McCallum's butcher/ delicatessen

2 Catchment area and population

2.1 Introduction

2.1.1 This section identifies the primary retail catchment area of Auchterarder in relation to its potential to accommodate a new supermarket. The catchment population is estimated, together with projections to 2023.

2.2 Primary catchment

2.2.1 The primary catchment is the area where most of the trade to a new supermarket in Auchterarder would be drawn from. Definition of the primary catchment mainly depends on drive times, the distribution of existing centres and supermarkets and population.

2.2.2 Drive times of around 10-15 minutes are an initial guide to the primary catchment area for mid-size supermarkets in rural areas. Table 2.1 shows the drive times from Auchterarder to other towns and villages. Main food shopping patterns from the NEMS household survey add further definition. Map 2.1 illustrates the study zones covered by the survey.

2.2.3 The patterns for main food shopping reveal that the primary catchment includes Zones 1-3 (Dunning, Auchterarder and Blackford)- see Map 2.2, but with high levels of leakage.

2.2.4 Zones 4-5 (Muthill and Braco) do not relate to Auchterarder for main food shopping, as they are drawn to Crieff and Stirling/ Dunblane respectively, as shown in Table 2.2. Development of existing supermarket consents in Crieff and Dunblane will maintain the position.

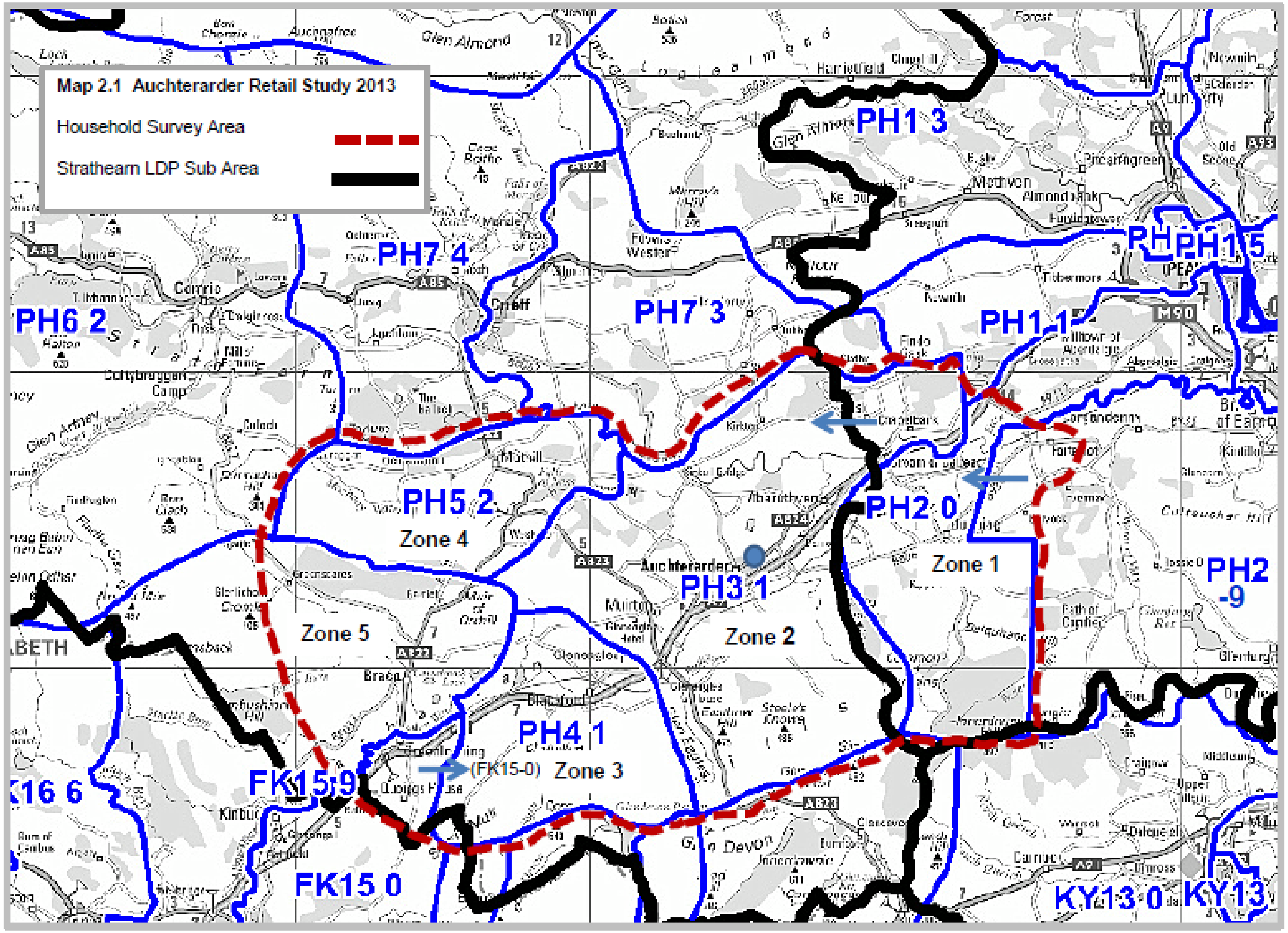
2.2.5 At present, the primary catchment of Auchterarder for main food shopping is really confined to Zone 2, but this would increase to cover Zones 1-3 in consideration of a new supermarket. Zones 4-5 would potentially form the secondary catchment.

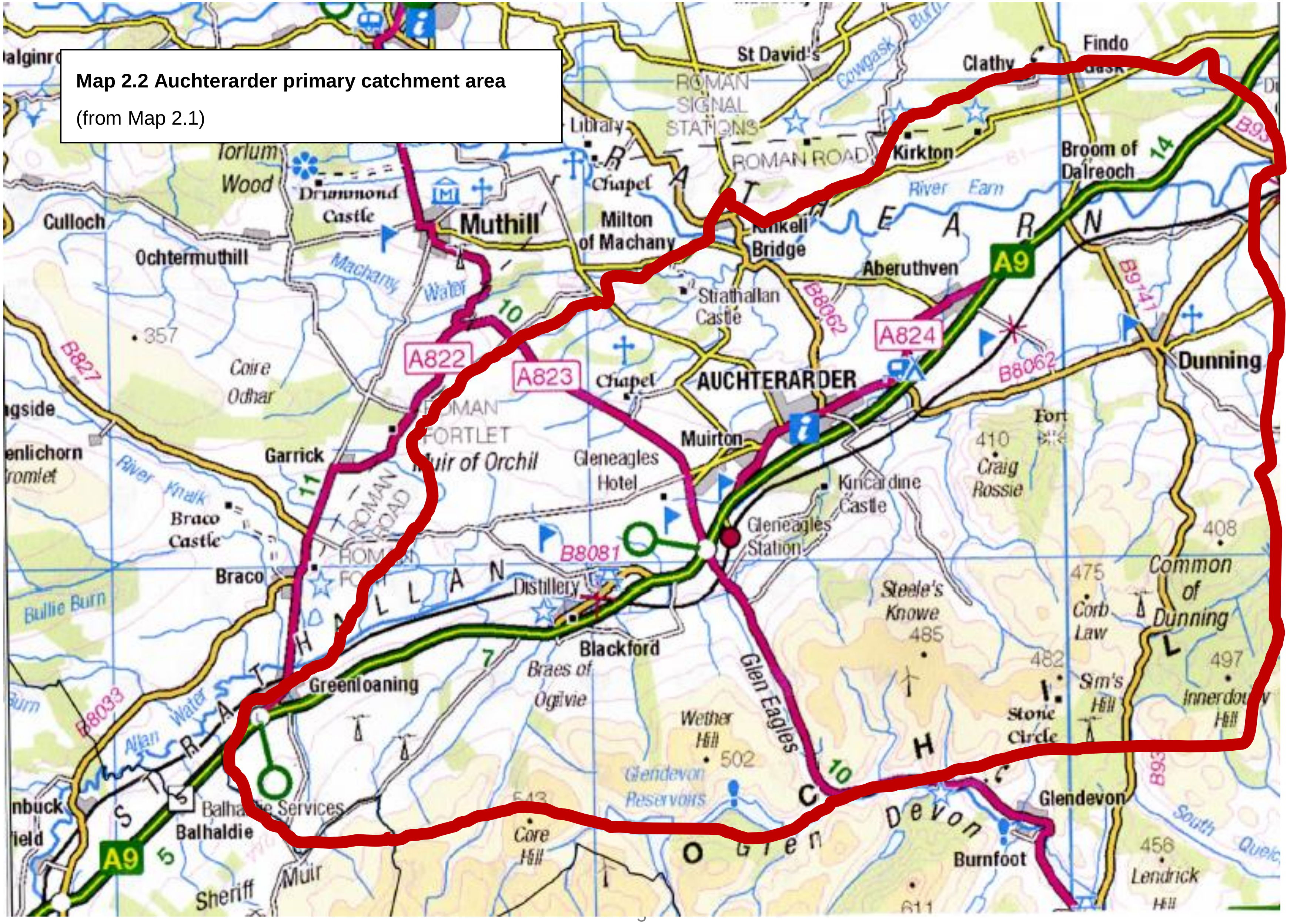
2.3 Catchment population

2.3.1 Table 2.3 shows the current and forecast population of the primary and secondary catchment areas, taking account of future housing completions in the Proposed Local Development Plan 2012.

Table 2.1
Indicative drive times - Auchterarder

Drive times and distances	Time minutes	Distance miles
Auchterarder to:		
to:		
Blackford	7	4.5
Aberuthven	6	3.4
Greenloaning	12	8.3
Muthill	13	6.8
Dunning	14	5.8
Braco	15	9.6
Forteviot	17	10.8
Crieff	20	10.2
Dunblane	21	13.0
Perth	23	15.5
Dollar	27	14.9
Crieff to:		
Muthill	6	3.5
Braco	18	9.6
Perth	26	17.5
Dunblane to:		
Greenloaning	11	5.2
Braco	14	6.6
AA Routeplanner- R MacLean estimates		


Map 2.1 Auchterarder Retail Study 2013
Household Survey Area
Strathearn LDP Sub Area
PH1 3
PH7 4
PH7 3
PH1 1
PH1 5
PH6 2
PH5 2
Zone 4
PH2 0
Zone 1
PH2 -9
PH3 1
Zone 5
Zone 2
PH4 1
(FK15-0)
Zone 3
FK15 9
FK15 0
KY13 0
KY13
Auchterarder
Crieff
Comrie
Methven
Glen Almond



Map 2.2 Auchterarder primary catchment area

(from Map 2.1)

Table 2.2
Main food shopping patterns- most visited centre/ store

Percentages are rounded	***Origin***					
Destination	from Dunning primary catchment (zone 1)	from Auchterarder primary catchment (zone 2)	from Blackford primary catchment (zone 3)	**from whole of primary catchment zones 1-3**	*from Muthill secondary catchment (zone 4)*	*from Braco secondary catchment (zone 5)*
Auchterarder shops	8%	27%	7%	**22%**	0%	0%
Dunning & Blackford shops	0%	0%	2%	**0%**	0%	0%
Tesco Crieff Rd, Perth	31%	28%	29%	**28%**	30%	4%
ASDA, Dunkeld Rd, Perth	17%	18%	11%	**17%**	12%	3%
Morrisons, St Cath, Perth	13%	9%	4%	**9%**	1%	4%
Co-op, High St Crieff	0%	0%	0%	**0%**	31%	0%
Sainsbury's, Drip Rd Stirling	0%	3%	7%	**3%**	3%	24%
Tesco Metro, Dunblane	0%	0%	4%	**1%**	0%	27%
Others- incl. Perth, Stirling, internet	31%	14%	36%	**19%**	23%	38%
Total	100%	100%	100%	**100%**	100%	100%

Source: NEMS household survey, February 2013, Q4a. (500 sample)

Table 2.3
Auchterarder household survey area and zones- population projections

Survey zones	2001 Census	% in (1) survey area	Survey area in 2001	2011 (2)	2013 (3)	2018 (3)	2023 (3)
Main catchment							
1 PH2-0 & PH2-9	13,605	8%	1,088	1,186	1,217	1,292	1,368
2 PH3-1	5,411	100%	5,411	5,894	6,051	6,422	6,803
3 PH4-1 & FK15-0 (part)	1,029	100%	1,029	1,121	1,151	1,221	1,294
RG based projected sub total					8,419	8,935	9,465
(4) Population related to housing completions					0	854	1,710
Sub total					**8,419**	**9,789**	**11,175**
Secondary catchment							
4 PH5-2	928	100%	928	1,011	1,038	1,101	1,167
5 FK15-9 (part)	729	100%	729	794	815	865	917
Total h hold survey area	**21,702**		**9,185**	**10,006**	**10,272**	**11,756**	**13,258**

Note:

part - refers to that part of the postcode sector in Perth & Kinross Council area

(1) estimated proportion of PH2-0 (7,611 census) in study area is based approximately on RG Locality population for Dunning in 2010 (988)
small part of PH2-9 (5,994 census) is included (Forteviot area), estimated at about 100 people. Total 1,088 in study area
The 2001 Census just show s a combined population of 1,657 for PH5-2 and FK15-9. This has been split, based on
the RG Localities populations for Muthill (56%) and Braco (44%) in 2010

(2) Population grow th to 2011 based on the recent Census 2011 release for Perth & Kinross- see below

134,949 *147,000*

(3) Population grow th 2011-23 based on the RG 2010 based population projections for Perth & Kinross:

2011	2013	2018	2023
149,680	153,667	163,086	172,749

(4) Proposed LD Plan allow s for up to 800 new houses in Auchterarder; 100 in Blackburn and 50 in Dunning by 2024= 950 total. Assuming an average household size of 2.2 w ith 90% incomers (1,881 pop), the follow ing eqivalent populations are estim

	2013	2018	2023
Cumulative pop from housing	0	854	1,710

The average household size in Perth & Kinross is 2.2, based on the 2010-based Household Projections by the Registrar General. The assumed 90% incomers is an estimate by R MacLean, w hich assumes that most housebuyers w ill not be local, ow ing to the small size of the tow n.

3 Town centre health check

3.1 Introduction

3.1.1 This section contains a review of the town centre retail offer and the uses and perceptions of the town centre, drawing on the findings of the household survey. It includes views on the issue of introducing a new supermarket to Auchterarder. The sub headings reflect the key health check performance indicators in the Scottish Planning Policy (SPP).

3.2 Town centre- built form

3.2.1 The area defined as Auchterarder town centre in the Local Development Plan is illustrated on Map 3.1. All the shops and services are concentrated in the High Street, which extends for about 450 metres in the town centre. The buildings are mainly traditional 19th century, stone built units of about two storeys. The properties are generally in good order and town centre is attractive.

3.2.2 The High Street is part of the busy A824 which passes through the town centre. Although there is on-street parking, it can be difficult to stop in front of the shops because of congestion and passing traffic. Perceived difficulties in parking/stopping are identified within the household survey.

3.3 Retail and service space

3.3.1 Table 3.1 shows the distribution of floorspace in the town centre by type of use. The distribution of floorspace by convenience, comparison and non-retail services appears well balanced, with non-retail services as the largest sector, which is common in small towns.

3.3.2 The principal foodstore is a small Co-op, which appears to be trading well. A list of the shops is provided in Appendix 1. The shops are all small, independent retailers, with the only multiple being Lloyds Pharmacy. Ellies Cellar and Davidsons Chemists are small regional chains.

3.3.3 There is a good range and quality of shops for a small town and there is a good level of services, including restaurants and take-aways and hairdressers/beauty salons. The provision reflects the relatively prosperous nature of the town. An obvious limitation is the absence of a larger supermarket, as most residents do their main food shopping elsewhere, as indicated in Table 2.2 and the analysis in section 4.

3.4 Vacancy rates

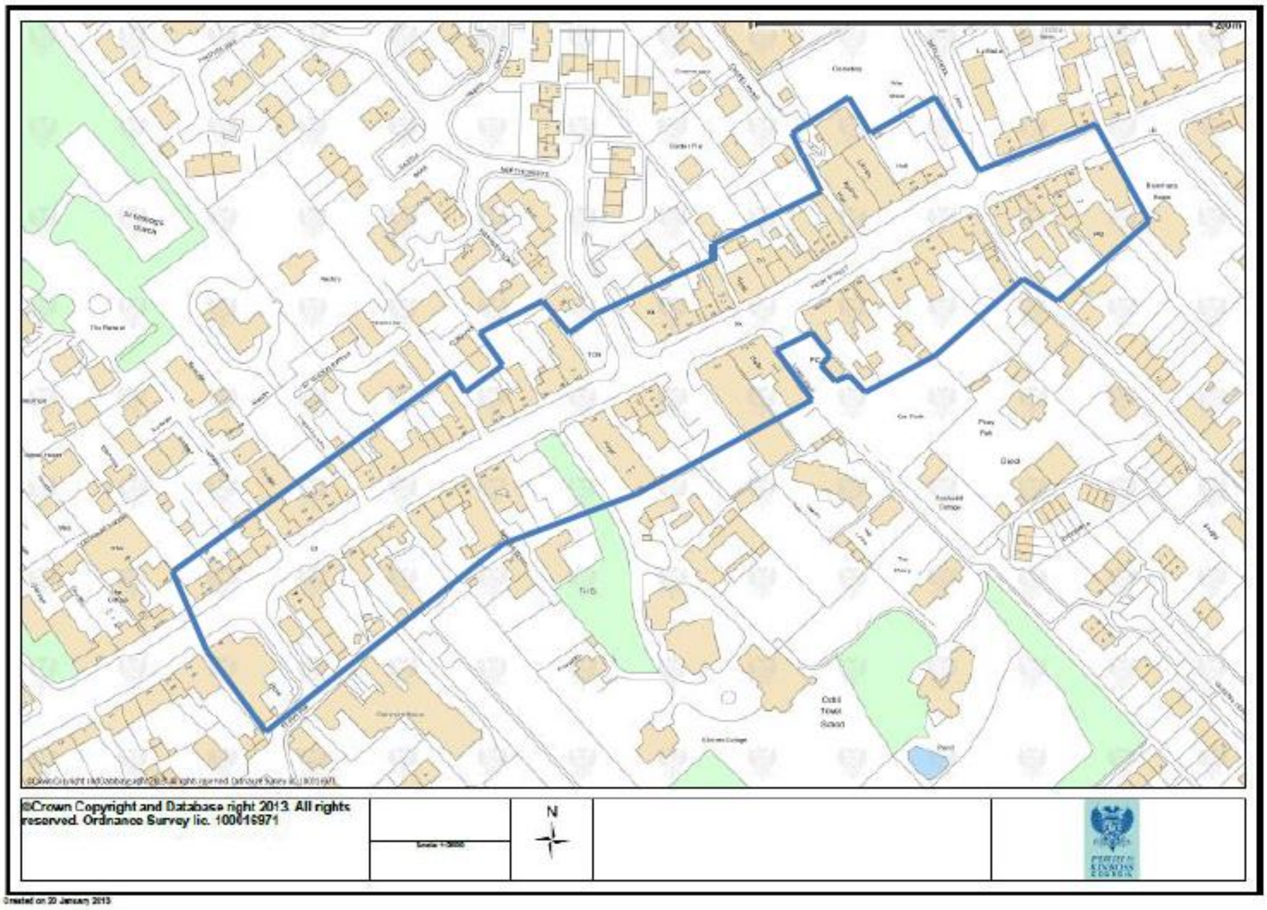
3.4.1 Currently, there are two vacant retail units: the former *Candy Creations* and the former *Lloyds Pharmacy unit* at 171 High Street which has recently relocated in the town. This is a considerable reduction from the seven vacant units recorded in the High Street by Goad in 2010. The very low level of vacancies, coupled with evidence of increasing occupation, is a positive achievement in the current economic conditions, where the trend is for increasing shop vacancies in town centres throughout the UK.

Table 3.1
Auchterarder town centre shops and services: floorspace in 2013

	No of units	Floorspace sq m gross	% of total (floorspace)
Convenience	9	1,463	26%
Comparison	19	1,675	30%
Non-retail services	22	2,130	38%
Vacant units	2	280	5%
Total	52	5,548	100%

Sources:
Convenience and comparison shops- street count and Assessor online- Appendix 1
Non-retail services- Goad
Vacant units- street count and Goad

Map 3.1 Auchterarder town centre boundary



3.5 Retail market demand

3.5.1 At the national level, many small town centres are experiencing hard times, particularly under the current economic conditions. Most retail investment is increasingly concentrated in the cities and among major budget retail operators. Increasing internet sales have also added pressure on retailers in small towns. However, some small towns have adapted quite well, usually where the retailers offer good quality and service, and where there is flexibility in the supply and demand for property i.e. operators and investors accept lower margins. Often this is the case where small independent retailers predominate, rather than national multiples.

3.5.2 There is continuing interest by the main supermarket operators in small towns, mainly for small/ mid- size supermarkets from 1,500 to 4,500 sq m gross, and for small local convenience formats of around 300 sq m gross.

3.5.3 Over the last six months or so, there is evidence of a slow-down in the actual development of supermarket consents by some of the operators, but this position is unlikely to remain static in such a fiercely competitive sector. It is fair to consider though, that opportunity sites, including existing consents, which are expensive to develop, or otherwise burdened, are less likely to be realised in today's market.

3.5.4 Ryden does not identify any formal retailer requirements for Auchterarder from their market research. Retailer demand is concentrated in the independent sector. Apart from supermarket operators, demand from the multiples is probably minimal - hence the lack of formally advertised requirements. This is an important point, because it means that the retail offer in the existing Auchterarder shops will remain dependent on the independent sector. Ryden also note that McCallums butcher, in Auchterarder, is for sale, through agents DM Hall.

3.5.5 There is understood to be potential supermarket operator interest in Auchterarder at present, but not yet at the stage where it can be declared.

3.6 Tourist spending

3.6.1 There is visitor spending in the town centre shops during the Spring and Summer months. It cannot be quantified precisely, but it will be small compared to spending by local people. For convenience shopping, it is likely to be less than 1% (see paragraph 4.3.2). Even if it was higher, visitor convenience spending would not add greater justification for the need for a foodstore. For comparison expenditure, visitor spending in the town centre will be higher -see Table 5.3. In general, the contribution of visitor spending is important to comparison retailers in small towns, although not necessarily critical, depending on the town.

3.7 Retail rents

3.7.1 Based on evidence from past transactions, Zone A retail rents in Auchterarder are £12 - £16 per sq ft., which is similar to those in Dunblane. Rents sought in Crieff are £11 - £18.50, although the rents achieved in past transactions are lower. By way of context with larger centres, Zone A retail rents in Perth are £65 per sq ft and £115 per sq ft in Stirling.

3.8 Yields

3.8.1 Retail property yields are a measure of the value to investors, so that, for example, low yields reflect higher values. Ryden advise that the yields in Auchterarder and Dunblane are around 9% - 10%. This compares to yields in Perth at 5.5% - 9.7% across a range of properties, for example.

3.9 Consumer views

3.9.1 The household survey provides valuable information on uses and perceptions of the town centre, including public interest in the opportunity for a new supermarket in Auchterarder. The graphs in Figure 3.1 show the most frequent responses to some of the key questions. Further detail can be found in the NEMS survey document.

3.9.2 **Frequency of visit to the town centre-** 59% of the respondents visited daily or two to six times per week. Some 17% visited weekly or two to three times a month. The rest were less frequent visitors.

3.9.3 **Mode of travel for main food shopping-** 78% travelled by car; 8% walked and 3% went by bus. Some 10% didn't travel (had groceries delivered).

3.9.4 **Internet shopping-** among those doing their main food shopping by internet, 68% had deliveries by Tesco, 18% by Sainsbury's and 14% by ASDA. The survey indicated that nearly 6% of respondents used internet ordering for most of their main food shopping. Use of the internet did not feature for top up shopping.

3.9.5 **Frequency of main food shopping trips-** 84% did their main food shopping weekly or two to three times a month. Therefore it is this pattern that would be most affected by the arrival of a new supermarket.

3.9.6 **Other things combined with main food shopping-** most people do non-food shopping or nothing else- see Figure 3.1. This reveals potential spin off for the town centre comparison shops from a new supermarket.

3.9.7 **Good points about the range and quality of food shops in Auchterarder-** the graph in Figure 3.1 shows that 27% had no particular opinion; 25% liked the quality of independent shops and 22% liked the range and quality of the shops generally. Only 8% liked the local supermarket.

3.9.8 **Bad points about the range and quality of food shops in Auchterarder-** among the dislikes, 20% thought the shops were expensive; 17% disliked the range and quality of shops; 14% did not like the main supermarket (too small/limited goods) and 11% identified a lack of parking see Figure 3.1. Otherwise 36% had no opinion.

3.9.9 **Likes about Auchterarder town centre-** 27% considered that it was friendly and 25% liked the range and quality of shops- see Figure 4.1.

3.9.10 **Dislikes about Auchterarder town centre-** 40% identified difficulties in parking or stopping and 38% had no particular views.

3.9.11 **Need for a new supermarket-** the respondents were asked if they thought that Auchterarder needs a new supermarket and how important would it be to them. Only 15% thought it was very important and 26% considered it quite important. Some 22% considered it unimportant and 30% were opposed to the prospect. These findings indicate minority support only, which is an important finding shown in Figure 3.1.

3.9.12 **Would the respondents use a new supermarket, if developed? -** only 23% indicated positively, with 43% saying 'possibly', with the balance saying 'no' or 'unlikely'.

Location of a new supermarket- the respondents were asked where in Auchterarder they would prefer a new supermarket to be located, if one was built. Some 33% preferred an edge of town or out of town location; 9% preferred an in-town location and only 6% identified the town centre. Some 19% did not know where it should be located and 27% did not want a new supermarket- see Figure 3.1.

3.10 Pedestrian flow count

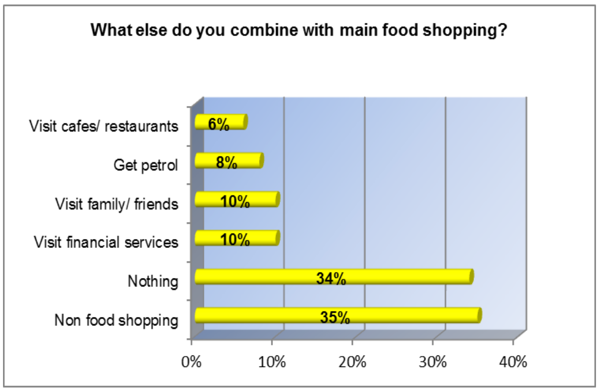
3.10.1 A pedestrian flow count was undertaken at ten locations on the High Street in Auchterarder town centre. Pedestrian counts are a measure of the vitality or footfall. The survey was conducted by PMRS Ltd (Pedestrian Market Research Services), who are UK specialists in the subject. The survey was conducted on Friday 8th February 2013 and on Saturday 9th February, with the findings grossed up by PMRS to provide weekly flow counts, which is a standard industry method.

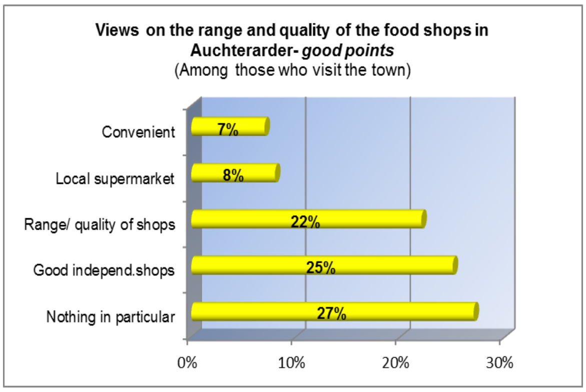
3.10.2 Appendix 2 shows the count points, which recorded pedestrian flows in both directions over the pavement width at each count point, between 10am to 5pm. It excluded children under 8, vagrants, postal staff, traffic wardens, police and delivery staff.

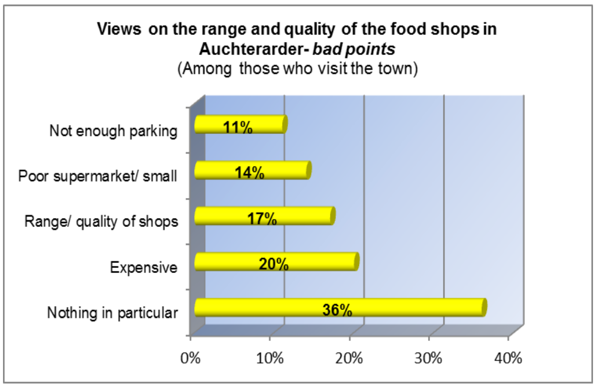
3.10.3 Table 3.2 shows the recorded flows, including the weekly flows. Unsurprisingly, the highest count appeared outside the Co-op at 4,920 per week, with the other busiest locations outside 'Sugar & Spice' (3,650 per week) and at the Star Hotel (3,530 per week). The lowest recordings were by the 'Design Floor Studio (1,620 per week) and by McCallums butcher at the western end of the town centre (1,740 per week).

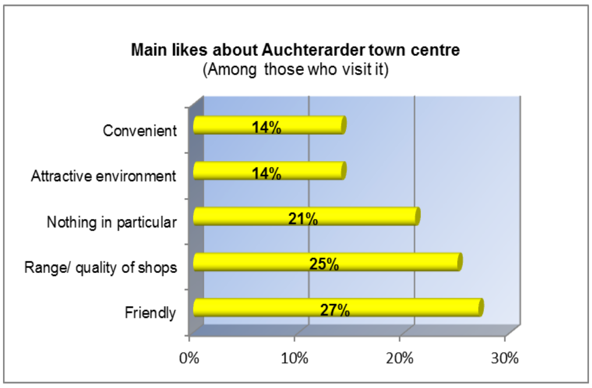
3.10.4 The weather was cold and overcast on Friday 8th February and cold with light rain on Saturday 9th February. In the

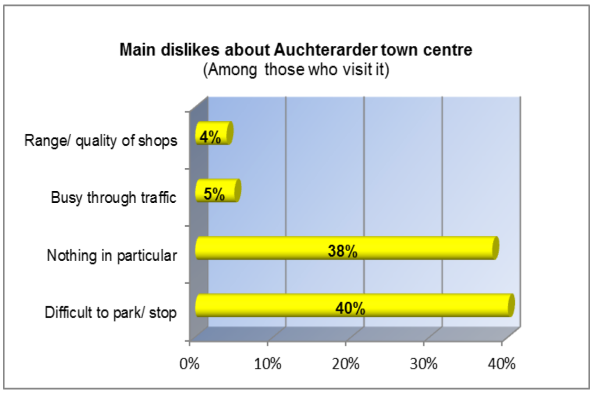
Figure 3.1 Household survey-town centre perceptions and food shopping

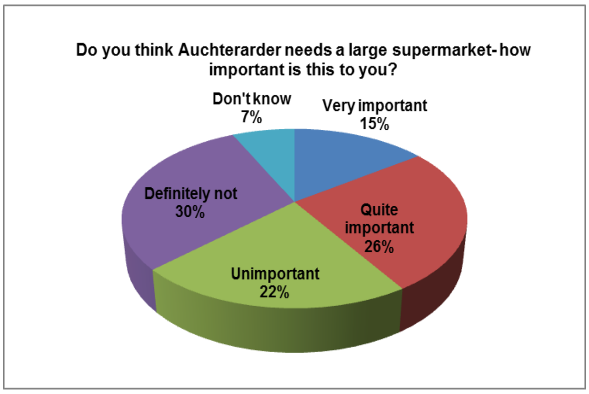


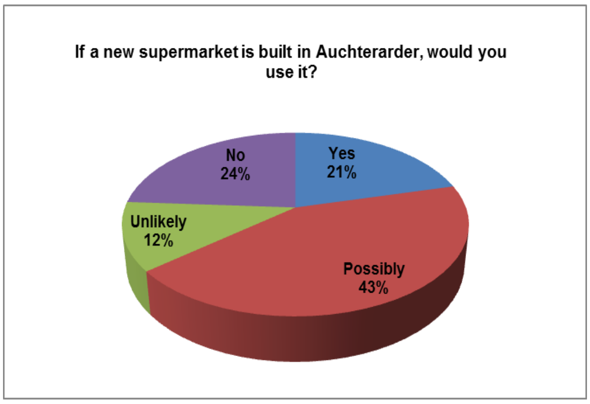












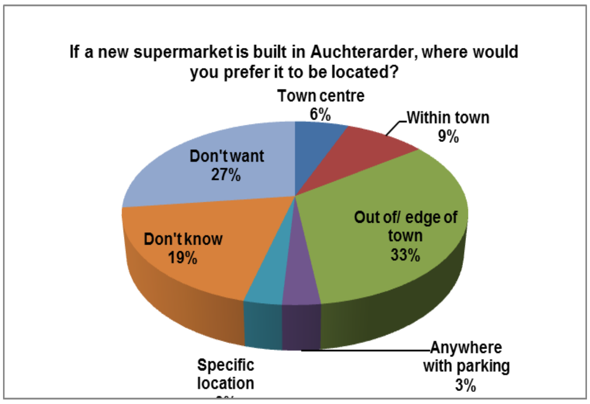


Table 3.2 Pedestrian flow counts in Auchterarder town centre (PMRS Ltd)- February 2013

10 survey points with counts shown in '000's.

NO	OCCUPIER	STREET & ADDRESS	NOTE	FRIDAY COUNT	FRIDAY INDEX	SATURDAY COUNT	SATURDAY INDEX	WEEK COUNT	WEEK INDEX
1	JAMES URQUART IRONMONGER	66 High Street		0.45	89	0.58	84	2.42	86
2	SUGAR & SPICE CONFECTIONERY	96 High Street		0.78	154	0.77	112	3.65	130
3	THE HERALD NEWSAGENT	95 High Street		0.46	91	0.55	80	2.38	85
4	STAR HOTEL	113 High Street		0.56	111	0.94	137	3.53	126
5	CO-OPERATIVE SUPERMARKET	124 High Street		0.83	164	1.26	183	4.92	175
6	HAIR PLUS HAIR	134 High Street		0.34	67	0.52	76	2.02	72
7	THE OLD TUDOR CAFÉ	149 High Street		0.50	99	0.73	106	2.89	103
8	DESIGN FLOOR STUDIO	162 High Street		0.33	65	0.36	52	1.62	58
9	LLOYDS PHARMACY	171 High Street		0.54	107	0.70	102	2.92	104
10	MCCALLUMS BUTCHER	201 High Street		0.27	53	0.47	68	1.74	62
	AVERAGE			0.51	100	0.69	100	2.81	100

Note: the survey counts are explained in paragraphs 3.10.1 to 3.10-3. The index refers to the percentage of the average flow, benchmarked at 100, as indicated.

tourist season (April to September), the counts would probably be higher.

3.11 Accessibility and parking

3.11.1 The findings of the household survey reveal that the great majority of people do their main food shopping by car and those difficulties in parking in the town centre is perceived as a significant problem by local people.

3.11.2 Indeed, parking problems were discussed in detail at the recent March meeting of the Auchterarder Community Partnership. The main issues are: not enough parking; unmanaged parking with cars being left all day to the inconvenience of other town centre users; chaotic parking and road safety risks associated with blocked views by parked vehicles.

3.12 Town centre SWOT summary

3.12.1 A summary of the strengths, weaknesses, opportunities and threats to the town centre is shown in Table 3.3. As an overview, it indicates that the town centre is sufficiently robust to accommodate a new supermarket of an appropriate scale, without materially threatening the town centre.

Table 3.3 Auchterarder town centre SWOT summary

Strengths	Weaknesses
• Good range and quality of independent retailers	• No substantial supermarket for main food shopping - local supermarket too small
• Attractive environment/setting, including street environment	• Low multiple retailer representation
• Readily defined primary catchment	• Limited retailer demand
• Fairly balanced level of retail demand and supply with low vacancy levels	• Difficulties with parking/difficult to stop
• Good range of non-retail services	• High outflow of shopping expenditure
• Perception from the survey that the town is friendly	• Food shops perceived as expensive
Opportunities	**Threats**
• Potential to recapture expenditure leakage with a new supermarket	• Continuation of the economic climate, causing reduced spending/town centre investment
• Scope for improved parking provision and management	• Limited local enthusiasm for introducing a new supermarket
	• Increasing internet spending
	• Increasing competition from the cities and superstores elsewhere

4 Convenience expenditure capacity

4.1 Introduction

4.1.1 This section provides an estimate of the spare convenience expenditure that could potentially service a new supermarket in Auchterarder.

4.1.2 The analysis examines the relationship between the convenience expenditure and turnover in the primary catchment area, based on shopping patterns from the household survey, including inflows from the secondary catchment and outflows from the primary catchment. The forecast spare expenditure capacity is converted to equivalent net retail floorspace for guidance.

4.2 Forecast catchment expenditure potential

4.2.1 Table 4.1 shows the forecast convenience expenditure per capita for the survey area, including both the primary and secondary catchment, based on updates to the Pitney Bowes data from the *Perth & Kinross Retail Review 2011*, as explained in the footnote to the table. Forecast convenience expenditure growth per capita for the study area is negligible over the next ten years.

4.2.2 Special forms of retailing, including internet spending, have been removed to allow compatibility with conventional retail floorspace requirements. The forecast total convenience expenditure potential of the residents of primary and secondary catchments is shown in Table 4.2. The expenditure potential is currently £16.7 million, rising to £24.0 million by 2023.

4.3 Convenience shopping patterns

4.3.1 The estimated pattern of convenience expenditure inflows and outflows from the primary catchment area are shown in Appendix 3, based on market shares from the household survey. Respondents were asked: Q1 *where do they normally go for most of their main food shopping*; Q3 *which other store/centre do they also visit for their main food shopping, but much less often;* and Q5 *where do they normally do their top up shopping*.

4.3.2 The responses were then weighted and combined to show the convenience expenditure inflows and outflows from the primary catchment. Inflows to the town centre are very small from the survey findings (0.3%). If an allowance for visitor spending is included, the total inflows could be around 1%, which is still low. Outflows are very high at 67%. Table 4.3 shows the relationship between expenditure and turnover in the primary catchment, after incorporating the shopping patterns. The deduced total turnover in 2013 is £5.7 million, rising to £8.3 million by 2023.

4.3.3 Also, the survey findings in Appendix 3 reveal that 91% of top up shopping is retained in the primary catchment, compared to 19% for main food shopping (most visited and second most visited stores/centres combined). Therefore Auchterarder serves an important role for top up shopping, but much less so for main food shopping.

4.4 Convenience floorspace and turnover

4.4.1 Table 4.4 shows the convenience retail floorspace in the primary catchment and the estimated current turnover at average levels, controlled to the survey based total turnover from the previous table. Over-trading above average levels of 20% is indicated.

4.4.2 Also shown is the survey based turnover, based on apportionment of the total from the household survey. It rather over-states the turnover of the Co-op and understates the turnover of the other shops. This is a common shortcoming of household surveys, where the most popular stores tend to be over-represented because of the nature of the questions. Accordingly, it is more reasonable to assign the over-trading to the Co-op and assume the rest are trading at average levels.

Table 4.1 Auchterarder survey area- forecast convenience expenditure per capita (in 2011 prices)							
	2010 £	2012	2013 £	2017	2018 £	2022	2023 £
UK per capita forecasts in 2009 prices	**1,800**	**1,722**	1,734	**1,783**	1,799	**1,866**	1,883
Perth & Kinross forecasts	2,092		2,015		2,091		2,188
Excluding special forms of retailing (-1.7%) in 2011 prices	*2,056*		*1,981*		*2,053*		*2,149*

Sources

UK per capita forecasts- Figures in bold from Pitney Bowes *Retail Expenditure Guide 2012-13*, Oxford Economics- Table 3.4. Others are interpolations/ extrapolation to 2023.

Perth & Kinross figures- Pitney Bowes *AnySite* report for Perth & Kinross. Original figure for 2010 (in 2010 prices) was £1,996. This has been adjusted to 2011 prices from Pitney Bowes Retail Expenditure Guide 2012-13, Table 3.2 (price deflators), and UK forecasts applied to 2023

Special forms of retailing includes mainly internet and mail order sales, except those picked off supermarket shelves- Pitney Bowes Ex Guide-p28.

Table 4.2 Auchterarder catchment areas: convenience expenditure potential of residents (in 2011 prices) *Excluding special forms of retailing*			
	2013 £ million	2018 £ million	2023 £ million
Main catchment area	16.7	20.1	24.0
Secondary catchment (Zones 4 & 5)	3.7	4.0	4.5

Note

From Tables 2.3 and 4.1

Table 4.3 Auchterarder primary catchment: convenience expenditure patterns and turnover, projected to 2023 (in 2011 prices)							
	2013		*2013-18*	2018	*2013-23*	2023
	%	£million	*growth £m*	£million	*growth £m*	£million
Residents' expenditure potential		16.7		20.1		24.0
plus inflows	1%	0.2		0.2		0.2
less outflows	-67%	-11.1		-13.4		-16.0
Retained expenditure (turnover)		5.7	*1.2*	6.9	*2.5*	8.3

Source: Table 4.2 and Appendix 3

Table 4.4 Auchterarder primary catchment- convenience floorspace and turnover in 2013 at average levels, and also the survey based turnover levels (in 2011 prices)						
	floorspace sq m		Turnover	Average turnover levels	*Survey based turnover levels*	
	gross	net	£ per sq m	£million	*%*	*£ million*
Co-op, Auchterarder	780	468	6,000	2.8	*82%*	*4.7*
SPAR & local shops (8 units)	683	410	3,000	1.2	*11%*	*0.6*
Blackford & Dunning shops (4 units)	303	182	3,000	0.5	*7%*	*0.4*
Total primary catchment				4.6	*100%*	*5.7*
Over- trading			*20%*	*1.2*		
Total turnover at actual levels (from survey based market share in Table 4.6)				**5.7**		

Sources

Co-op floorspace- Goad

All other shops- Street count Feb 2013 and Assessor online. See list of town centre shops in Appendix 1

4.5 Spare convenience expenditure capacity

4.5.1 Spare retail capacity can exist in the following forms:

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

4.5.2 The planning context for defining spare capacity is the level of new retail development that can be accommodated without threatening the vitality and viability of established town centres.

4.5.3 Spare capacity is also normally expressed after the deduction of existing planning commitments. There are no major retail consents in Auchterarder, although the consent for a Tesco supermarket in Crieff and the consent for a supermarket at Barbush, Dunblane, will limit the potential to draw more trade from beyond the Auchterarder primary catchment in the future.

4.6 Range of spare capacity

4.6.1 Table 4.5 sets out the forecast spare convenience expenditure relating to the primary catchment area up to 2023. A range is provided, with the **low** end of the range including projected growth in turnover potential and current overtrading, plus a nominal allowance for local retail impact. The **high** end allows for claw back of leakage and the attraction of new trade into the primary catchment.

4.6.2 Among the advantages of providing a simple range of forecast capacity is that it reduces the need to provide an extensive list of various different scenarios for testing, because most would fall within the specified range. This issue is revisited at the end of this section.

4.6.3 The forecast range of spare convenience capacity is expressed in monetary values and also in equivalent net convenience floorspace, based on the average turnover ratio of the four main supermarket operators in the UK (Tesco, ASDA, Sainsbury's and Morrisons). The equivalent floorspace is merely for guidance, as the monetary values are more reliable, given the variations in operator turnover levels. In addition, the equivalent gross floorspace is also indicated, but this is only for rough guidance, as operator formats vary.

4.6.4 In Table 4.5, the current *over-trading* and *forecast growth in retained expenditure* in the primary catchment is quite small, and certainly nowhere near enough to sustain a new supermarket.

4.6.5 The proportion of expenditure leakage is high in relation to the residents' expenditure potential, as indicated in Table 4.5. However, the absolute amount is not large and the household survey indicated that a substantial proportion of respondents would not/ might not use a new supermarket. With that evidence, it is unlikely that more than 50% of the *leakage could potentially be retained* by a new supermarket- (a) because it would not be large enough to compete effectively with the superstores in Perth, and (b) because of the indicated reluctance of residents to use it.

4.6.6 In Table 4.5, the inflows of expenditure to the primary catchment are very small. With the introduction of a new supermarket, it is fair to consider that these inflows would be greatly increased from the secondary catchment. It is estimated that the increase could be five-fold, but that does not amount to much in absolute expenditure. The eventual opening of the new Tesco in Crieff will limit the potential draw from the secondary catchment, as will the supermarket consent in Dunblane. There is greater uncertainty over implementation of the Dunblane consent though, until an operator is announced.

4.6.7 *'Acceptable' levels of retail* impact refer to the situation where a new development drives the turnover of established centres/ stores, below average trading levels. The impact is normally expressed as the percentage below average levels.

4.6.8 There is no set standard on what level of impact is acceptable. If, for example, 10% impact was held to be acceptable on convenience floorspace in Auchterarder town centre, that would represent around £0.4

Table 4.5
Auchterarder primary catchement: forecast spare convenience expenditure capacity (in 2011 prices)

	2013-18		2013-23	
	range		range	
	low £million	high £million	low £million	high
(a) Current over- trading (Table 4.4)	1.2		1.2	
(b) Retained expenditure growth (turnover growth from Table 4.3)	1.2		2.5	
Expenditure outflows from catchment (67% of expenditure from Table 4.3) (c) Claw back potential- say 50% of outflow		6.7		8.0
Expenditure inflows to catchment (1% of expenditure from Table 4.3) (d) Increase (new trade) potential- say 5 times current inflow		1.0		1.2
(e) Nominal allowance for 'acceptable' retail impact- say 10% of the Auchterarder turnover at av levels- Table 4.4		0.4		0.4
Total spare capacity (a+b+c+d+e)	**2.3**	**10.4**	**3.7**	**13.3**
	sq m net	sq m net	sq m net	sq m net
*Equivalent supermarket *net* convenience floorspace	206	918	325	1,168
Rounded to the nearest 100 sq m	**200**	**900**	**300**	**1,200**
**Equivalent supermarket gross convenience floorspace *Rounded to the nearest 100 sq m*	**400**	**1,800**	**600**	**2,300**

Note
* Assumes new mainstream supermarket provision capable of generating the estimated increases in expenditure retention and attraction from outside the area- i.e. theoretical maximum capacity. The average turnover ratio for the four main operators (Tesco, ASDA, Sainsbury's and Morrisons) in the Retail Rankings 2012 has been applied- £11,378 per sq m net.
The equivalent floorspace w ill be larger for stores w ith low er turnover ratios.
** The gross equivalent floorspace assumes a net/gross ratio of 60% and allow s for 15% comparison sales floorspace in addition to the convenience floorspace. This is just for rough guidance, as operator formats vary.

million additional spare capacity, as in Table 4.5.

4.7 Spare convenience capacity- summary

Under the low range, the forecast spare capacity from 2013 is only £2.3 million to 2018 and £3.7 million to 2023. This would not support a mid-range supermarket, but it could potentially support a neighbourhood supermarket such as a Tesco Express or Sainsbury's Local, or alternatively, a discount food store such as Lidl or Aldi.

4.7.1 **Under the high range**, the forecast spare capacity from 2013 is £10.4 million to 2018 and £13.3 million to 2023. This assumes that it could be substantially supported by the claw back of leakage, although the assumptions on potential claw back are modest, for the reasons explained earlier in this section. The claw back of leakage could expect to come from the stores and centres identified in Table 2.2, which include Tesco at Crieff Road, Perth, and ASDA Morrisons in Perth, plus others.

4.7.2 Therefore a small supermarket of some 900 sq m net convenience floorspace probably could be supported in the meantime, with prospects of support for up to 1,200 sq m net convenience floorspace by 2023. By way of example, consent has recently been granted for a 1,300 sq m gross supermarket with some 900 sq m net convenience floorspace in the small town of Maybole, in South Ayrshire (with a mainstream operator). The justification was to reduce journeys to Ayr for convenience shopping.

Summary

Low range: up to £3.7 million by 2023 (300 sq m net convenience floorspace)

High range: up to £13.3m by 2023 (1,200 sq m net convenience floorspace

4.7.3 It should be noted that retail capacity studies are fairly broad brush exercises, so applicants will still need to produce their own retail assessments in support of any supermarket development applications. Furthermore, forecasts of spare capacity beyond ten years ahead will be subject to very great uncertainty, therefore it is better to monitor the data over five year periods, for example and provide refreshed forecasts, rather than attempt 15 year forecasts for example.

4.8 Perth & Kinross Retail Review 2011- context

4.8.1 The Retail Review in 2011 predicted a slight under-capacity in the Strathearn area by 2021, assuming a new supermarket is developed in Crieff. However, the analysis in the Review did not include an allowance for local retail impact, and also, some of the mainstream supermarket turnover ratios have come down since that study.

4.8.2 Taking these factors into account, the findings of the more detailed Auchterarder study on capacity appear to be broadly consistent with the 2011 Review, particularly as the town does not have, and probably will not have, a close relationship to Crieff for convenience shopping.

4.9 Alternative scenarios

4.9.1 Outside the range of forecast spare convenience capacity in this report, the most likely cause of variations in the assumptions are likely to be (a) failure of the estimated housing completions in Auchterarder to achieve the level of assumed development, and (b) failure of a new supermarket in Auchterarder to achieve the anticipated level of clawback of leakage. Both these scenarios would lead to less capacity.

4.9.2 Under scenario (a), if the anticipated level of new local house completions is halved, the forecast capacity would equate to a supermarket with 1,100 sq m net convenience floorspace by 2023, which is little different from the upper range shown as the main case in this report.

4.9.3 Under scenario (b), if the claw back of leakage is 40% instead of 50%, the forecast capacity would equate to a supermarket with 1,000 sq m net convenience floorspace by 2023. Again, this figure is not radically different from the main case.

4.9.4 Therefore, neither of these scenarios suggests that there is much risk that the range of forecast capacity in this report would not remain broadly valid in the event of these changes.

5 Comparison expenditure capacity

5.1 Introduction

5.1.1 This section provides estimates of the comparison expenditure and turnover relationship for the Auchterarder primary catchment, including comparison shopping patterns from the household survey. The main purpose is to demonstrate that there is very substantial comparison expenditure leakage from Auchterarder, as most residents do non-food shopping in the main centres, especially Perth.

5.1.2 The main factor determining future comparison retail development in Auchterarder is the market, rather than expenditure capacity. As with most small towns, demand is unlikely to support more than a few small comparison retail units, or even just the status quo, because the potential to claw back leakage to the main centres will be very low. So there is no need for an equivalent to Table 4.5 for comparison retailing for the purposes of this study, where the focus is on convenience retailing

5.2 Projected catchment expenditure potential

5.2.1 Table 5.1 shows the forecast comparison expenditure per capita for the primary catchment to 2023. The proportion of special forms of retailing, including internet spending, is predicted to increase significantly, as shown in Appendix 4. These proportions are deducted from the expenditure per capita to allow compatibility with future retail floorspace requirements. The forecast growth rates in comparison spending are much higher than the rates for convenience expenditure.

5.2.2 The primary catchment comparison expenditure potential is shown in Table 5.2, which is around £24 million currently, rising to some £49 million by 2023.

5.3 Comparison shopping patterns

5.3.1 In the household survey, the respondents were asked where they visited most often for *personal goods* and for *household* (or bulky goods). The resulting findings on the patterns are summarised in Appendix 5, where composite patterns for *all comparison* expenditure are calculated from these two categories.

5.3.2 It should be noted that the survey-based patterns exaggerate the leakage and under-state the inflows, to the extent that the floorspace in the primary catchment could not reasonably be supported. So adjustments to the survey based figures are necessary, as shown in Appendix 5.

5.3.3 In the personal goods category, Perth City Centre accounted for 64% of all destinations by residents of the primary catchment; Stirling City Centre 20%; Glasgow 7% and Auchterarder 5%. In the household goods category, Perth City Centre accounted for 46% of all destinations by residents of the primary catchment; St Catherine's Retail Park 20%; Sprinkerse 9%; Auchterarder 9% and Stirling City Centre 4%.

5.3.4 Note that the above quoted proportions excluded internet spending, as they focus on physical shopping destinations. In fact, internet spending is important, accounting for about 10% of personal goods spending and 12% of household spending as proportions of all the responses.

5.3.5 Table 5.3 shows the current and forecast comparison expenditure and turnover in the Auchterarder primary catchment, after applying the shopping patterns.

5.4 Comparison floorspace and turnover

5.4.1 Table 5.4 shows the comparison retail floorspace in the primary catchment and the estimated current turnover at average levels, controlled to the survey based total (with the adjustments in Appendix 5).

Table 5.1
Auchterarder survey area- forecast comparison expenditure per capita (in 2011 prices)

	2010 £	2012	2013 £	2017	2018 £	2022	2023 £
UK per capita forecasts in 2009 prices	**3,058**	**3,084**	3,227	**3,867**	4,055	**4,903**	5,141
Perth & Kinross forecasts	3,189		3,365		4,229		5,362
Excluding special forms of retailing in 2011 prices			*2,870*		*3,514*		*4,391*

Sources
UK per capita forecasts- Figures in bold from Pitney Bow es *Retail Expenditure Guide 2012-13* , Oxford Economics- Table 3.4. Others are interpolations/ extrapolation to 2023.
Perth & Kinross figures- Pitney Bow es *AnySite* report for Perth & Kinross. Original figure for 2010 (in 2010 prices) w as £3,145. This has been adjusted to 2011 prices from Pitney Bow es Retail Expenditure Guide 2012-13, Table 3.2 (price deflators), and UK forecasts applied to 2023
Special forms of retailing includes mainly internet and mail order sales. The proportions are projected to increase to 2023- see Appendix 4.

Table 5.2
Auchterarder catchment areas: comparison expenditure potential of residents (in 2011 prices)
Excluding special forms of retailing

	2013 £ million	2018 £ million	2023 £ million
Main catchment area	24.2	34.4	49.1
Secondary catchment (Zones 4 & 5)	5.3	6.9	9.1

Note
From Tables 2.3 and 5.1

Table 5.3
Auchterarder primary catchment: comparison expenditure patterns and turnover, projected to 2023 (in 2011 prices)

	2013		*2013-18*	2018	*2013-23*	2023
	%	£million	*growth £m*	£million	*growth £m*	£million
Residents' expenditure potential		24.2		34.4		49.1
plus inflows from h/h survey	1%	0.2		0.3		0.5
* visitor inflows	4%	1.0		1.4		2.0
less outflows	-87%	-21.0		-29.9		-42.7
Retained expenditure (turnover)		4.3	*1.8*	6.2	*4.5*	8.8

Source: Table 5.2 and Appendix 5
*Visitor inflow s derive from an estimated £0.72m to the Eaglesgate Retail Village (Pavers and Leading Lables) plus other, rounded to £1m= 4%

5.5 Capacity- broad indication

5.5.1 With estimated current £21 million comparison expenditure leakage from the Auchterarder primary catchment (Table 5.3), there is sufficient evidence to suggest that there is capacity to support additional comparison retailing in Auchterarder, and relevant to this study, capacity to support any minor level of comparison floorspace associated with the scale of any potential supermarket opportunity suggested in section 4.

Table 5.4
Auchterarder primary catchment- comparison floorspace and turnover in 2013 at average levels (in 2011 prices)

	floorspace sq m		Turnover	Average turnover levels
	gross	net	£ per sq m	£million
Auchterarder town centre shops	1,675	1,005	2,850	2.9
Other Auchterarder (Gleneagles Furniture)	633	506	1,500	0.8
Eaglesgate Retail Village (Pavers shoes & Leading Lables)	600	480	1,500	0.7
Total primary catchment				4.3
Over- trading			*0%*	
Total turnover at actual levels (from Table 5.3)				**4.3**

Sources
Tow n centre comparison floorspace- Assessor online- see Appendix 1
Eaglesgate Retail Village- relevant units - estimate by R MacLean from Google

6 Potential supermarket site opportunities

6.1 Introduction

6.1.1 This section briefly explores potential supermarket development opportunities in Auchterarder, within the context of the sequential test. Under this planning policy, the preferred location for new retail development is within town centres, followed by edge of centre locations where there are no opportunities in the town centre. Out of centre sites take lowest priority and require justification under a set of criteria.

6.2 Site requirements

6.2.1 Section 4 of this report identified the potential to support a supermarket of 1,200 sq m net convenience floorspace, or about 2,300 sq m gross (allowing for 15% comparison floorspace) in Auchterarder.

6.2.2 For guidance, it is of a similar scale to the planning consent for a Sainsbury's store at Bridge Road, Pitlochry (10/0066/FLM) at 2,417 sq m gross, with parking for 187 cars. The supporting Design Statement specifies a development area of 1.34 ha.

6.2.3 If a petrol filling station (pfs) was to be included, the site area would be larger. For example, the Tesco stores in North Berwick (2,600 sq m gross) and in Tain (2,500 sq m) have site areas closer to 2.0ha.

6.2.4 The likely scale of the supermarket opportunity in Auchterarder is slightly smaller than these examples, so a notional indicative site size might be 1.3ha with no pfs and 1.8ha with a pfs. In fact, site areas for a specified supermarket size can vary significantly, depending on the shape of the site, agreed parking provision, access arrangements and landscaping requirements.

6.3 Potential supermarket sites in Auchterarder

6.3.1 From consultation with the Council, seven potential sites have been identified for comment in this study- see Map 6.1. Note that the areas quoted are map based estimates and reference should be made to the promoters of these sites for accurate measurements. Note that this study does not imply Council support for any particular site. It is merely investigative.

6.3.2 **Site 1: Docherty Coachworks and the Council Car Park-** this irregular shaped site of just under 0.5ha is in the town centre, therefore it would satisfy the sequential test on location. However, it is too small to accommodate a supermarket of around 2,300 sq m gross. Nor is the shape well suited to accommodate any supermarket development with parking. Operators seek a plainly visible frontage for their stores and regular shaped sites are more efficient at accommodating the development.

6.3.3 The site area is less than 40% of the required area indicated in this section and its irregular shape suggests that it cannot be assumed to accommodate a store building of 40% of the required size.

6.3.4 Development of a store on stilts, with parking below, appears as an unlikely solution, because the high costs for a small store would make it unviable. The limited examples of stores on stilts are normally superstores in major towns and cities, where the high development costs are funded by the weight of trade. Asides, development of a stilted building in Auchterarder would also raise significant townscape issues.

6.3.5 Intensification of the existing use as a car park with additional supermarket related traffic may result in exit/entry problems directly onto High Street, and the Council's road engineers would be able to advise if there are issues.

6.3.6 In the opinion of this author, Site 1 is unsuited to meet the target supermarket size identified in this report and a much smaller store would not achieve the desired claw back of leakage.

6.3.7 **Site 2:** is a fencing contractor's yard and bowling green, covering an area of some 0.85ha. It was assessed by the Council back in 1999 for retail development. This site has much the same constraints as Site 1 and it is unsuitable for the target size of supermarket indicated in this report, because of its small size and irregular shape.

Site 3: is a greenfield site at eastern end of town. It is discounted for supermarket development because it has a planning application (08/01501/FLL) for 19 dwellings and there also planning consent (08/01654/FUL) for a SUDS pond associated with the proposed development of 19 dwellings on the adjacent Site 5.

6.3.8 **Site 4:** the site is around 3.3ha and it is located some 800 metres east of the town centre boundary, on the A824. It is a regular shaped site which could accommodate a new supermarket with parking (and a petrol filling station), assuming that there are no other constraints which cannot reasonably be overcome.

6.3.9 As an out of centre site, it does not comply with the sequential test, so justification would have to be provided, together with supporting evidence that it would not materially threaten the town centre in the form of a retail impact assessment. The findings of this capacity study already indicate that part of the justification would be the potential to claw back leakage and retain more food related expenditure in Auchterarder.

6.3.10 At a distance of some 800 metres from the edge of the town centre, it seems unlikely that users of the supermarket would leave their cars in the car park and walk into the town centre for additional shopping. So the town centre traffic congestion/parking issues would probably remain. Nevertheless, the presence of a new supermarket in Auchterarder may generate more spin-off shopping visits to the town centre simply because it is there, as many of the customers would otherwise be shopping in Perth.

6.3.11 **Site 5 :** is another greenfield site that has been discounted for supermarket development because of accessibility, topography and potential flooding issues in part of the site. It also has planning consent (08/01654/FUL) for a SUDS pond associated with the proposed development of 19 dwellings on site 3.

6.3.12 **Site 6:** the site is around 3.2ha located on the south side of the A824, opposite Site 4. It is a regular shaped site which could accommodate a new supermarket with parking (and a petrol filling station) , assuming that there are no other constraints which cannot reasonably be overcome. Therefore it appears to offer a similar opportunity to Site 4, although the road frontage is more limited, as it is situated behind some existing properties. This is not necessarily a planning constraint, so further comment cannot be reasonably be made in this study.

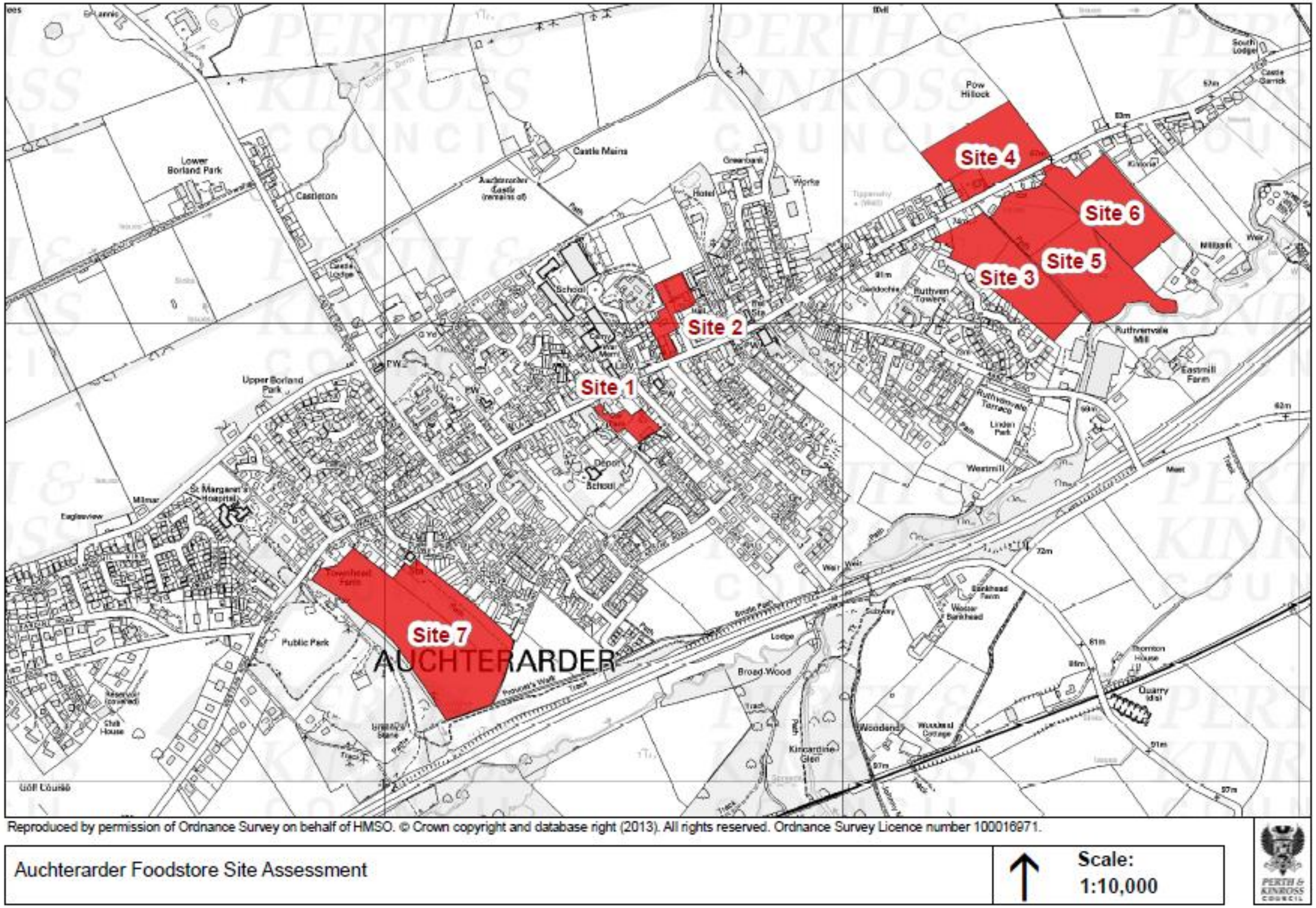
6.3.13 **Site 7:** is a greenfield site at western end of town. It has been discounted for supermarket development as it forms part of Auchterarder Expansion Framework and is allocated for residential development in the Proposed Local Development Plan. It has a planning application (08/01131/IPM) for residential development which is recommended for approval but is awaiting release following conclusion of a Section 75 legal agreement. The site is currently being marketed for residential development and there is an undetermined detailed planning application (12/00431/FLM) for 143 dwellings on a large part of the site.

6.4 Conclusions

6.4.1 There are two identified potential sites which could accommodate a new supermarket of around 2,300 sq m gross in Auchterarder (Sites 4 and 6), and potentially a petrol filling station. These sites could also accommodate a larger supermarket. No obvious town centre site opportunities exist to accommodate a significant new supermarket.

6.4.2 Although the identified opportunities are out of centre, the household survey findings indicate that many of the public would prefer a new supermarket to be in an edge of centre, or an out of centre location.

Map 6.1 Auchterarder supermarket opportunity sites- review



7 Summary

7.1.1 Auchterarder has a primary catchment population of some 8,400, rising to around 11,200 by 2023, assisted by planned new housing development. The area covers Auchterarder, Dunning and Blackford. The secondary catchment includes Braco and Muthill.

7.1.2 The convenience expenditure potential of the primary catchment residents is £16.7 million, rising to £24 million in 2023. The leakage of convenience expenditure is very high at 67%, which mostly goes to superstores in Perth. It is estimated that the current convenience turnover in the catchment is only about £5.7 million, with the small Co-op trading well.

7.1.3 Under the health check analysis, Auchterarder town centre is performing quite well, although there are problems with parking. Its main weakness is the lack of a supermarket to provide for main food shopping, as the existing supermarket (the Co-op) is small.

7.1.4 However, the household survey indicates mixed feelings by local people of introducing a new supermarket to Auchterarder, including possible reluctance to make full use of one if it is developed. Taking account of this evidence, the study assumes that a new supermarket probably would not claw back more than 50% of the convenience expenditure leakage.

7.1.5 The modest total catchment expenditure potential would only support a small supermarket. This is another important limitation on the potential to claw back leakage, because the supermarket needs to be large enough to compete effectively with the superstores in Perth for Auchterarder customers.

7.1.6 In this study, it is estimated that a new supermarket with up to **1,200 sq m net convenience floorspace** could be supported by 2023 (or earlier). The gross equivalent floorspace could be around **2,300 sq m, including some comparison floorspace**. This conclusion allows for some trade diversion on the town centre.

7.1.7 Without the potential to claw back leakage, there would still be expenditure to support a small convenience supermarket, such as a Tesco Express or Sainbury's Local, or a discount foodstore operator, such as Aldi or Lidl.

7.1.8 There are no particular constraints arising from the comparison expenditure potential, where this may relate to a small element of comparison floorspace in a new supermarket.

7.1.9 At present, there are two out of centre sites which could feasibly accommodate a new supermarket in Auchterarder. The sites are opposite each other at about 800 meters east of the edge of the town centre. There are no sites of sufficient scale in the town centre, or at the edge of centre. Responses to the household survey indicated that most of the public would prefer an edge of centre or an out of centre location for any new supermarket. New proposals should still be supported by a retail impact assessment to demonstrate that the town centre would not be materially threatened.

Appendix 1

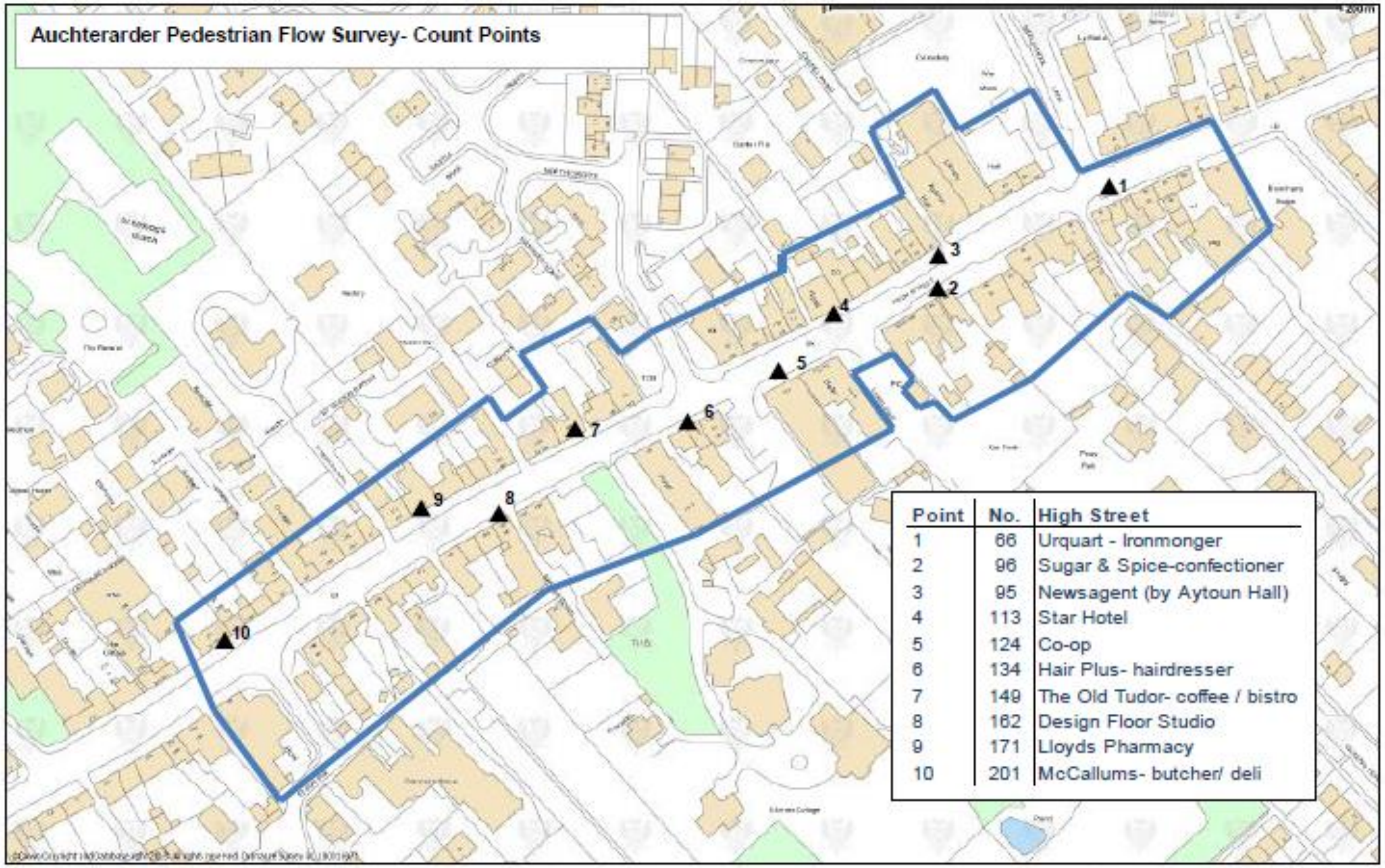
Auchterarder town centre- list of shops in 2013

Shops in Auchterarder town centre from street count, February 2013			
		Address High St	Area sq m gross
Convenience			
Alexa Dunlop	greengrocer	195	
Ellies Cellar	wines	106	
Simon Howie	butcher	112	
Co-op	supermarket	124-126	
McCallums	butcher	201	
Spar	convenience store	200	
Sugar & Spice	baker	96	
News Plus	newsagent	95	
Jan d Vries	health foods	125	
Total 9 units			**1,463**
Comparison			
Lloyds Pharmacy (relocation to former *Squeezebox* , April 2013)	chemist	141	
D&R Robertson	shoes	173	
Forget me not	clothing	114	
The Florist	flowers	84	
Bear Necessities	clothing	185	
Tiny Touch	childrens' wear	169A	
Lables fo Less	ladies' wear	80	
Whisper	lingerie	-	
Design Floor	carpets and flooring	162	
ES Erskine	optician	156	
Lillipinks	gifts	81	
Mona Lizq	ladies' wear	169b	
James Urquhart	hardware	66-68	
Kiddie Kouture	childrens' wear	86	
Catherine's	clothing	72	
Child after Child	childrens' wear	63	
Davidsons	chemist	54	
Alexa Dunlop	flowers	195	
Pat Renson Interiors	décor	183	
Total 19 units			**1,675**
Out of centre- Auchterarder			
Gleneagles Furniture Centre	furniture		633
Town Centre vacant units (April 2013)			
2 units (171 High St- Lloyds vacated unit and Candy Creations)			280
Note:			
Floorspace from the Assessor online, apart from the Co-op (Goad).			

Appendix 2

Pedestrian flow count points on Auchterarder High St

Auchterarder Pedestrian Flow Survey- Count Points



Point	No.	High Street
1	66	Urquart - Ironmonger
2	96	Sugar & Spice-confectioner
3	95	Newsagent (by Aytoun Hall)
4	113	Star Hotel
5	124	Co-op
6	134	Hair Plus- hairdresser
7	149	The Old Tudor- coffee / bistro
8	162	Design Floor Studio
9	171	Lloyds Pharmacy
10	201	McCallums- butcher/ deli

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Created on 30 January 2013

Appendix 3

Household survey- convenience shopping patterns

Q1 Main food shopping in Auchterarder- store visited most often
Percentages are rounded

Destination	From primary catchment sample nos	From secondary catchment sample nos
Co-op, Auchterarder	82	0
SPAR & local shops, Auchterarder	8	0
Blackford & Dunning shops	1	0
Total primary catchment (a)	91	
Survey sample in primary catchment (b)	411	
% retained in primary catchment (a/b)	22%	
Total inflows from secondary catchment (c)		0
Survey sample in secondary catchment (d)		92
inflows as % of primary catchment (c/b)		0%

Source: NEMS household survey, February 2013- w eighted

Q3 Main food shopping in Auchterarder- store visited much less often
Percentages are rounded

Destination	From primary catchment sample nos	From secondary catchment sample nos
Co-op, Auchterarder	15	3
SPAR & local shops, Auchterarder	3	0
Blackford & Dunning shops	0	0
Total primary catchment (a)	18	
Survey sample in primary catchment	411	
Less: *mail order, don't know* ,		
don't do,other, nowhere else (b)	191	
% retained in primary catchment (a/b)	9%	
Total inflows from secondary catchment (c)		3
Survey sample in secondary catchment (d)		92
inflows as % of primary catchment (c/b)		2%

Source: NEMS household survey, February 2013- w eighted

Q3 Top up shopping in Auchterarder- stores visited
Percentages are rounded

Destination	From primary catchment sample nos	From secondary catchment sample nos
Co-op, Auchterarder	252	2
SPAR & local shops, Auchterarder	39	3
Blackford & Dunning shops	42	0
Total primary catchment (a)	333	
Survey sample in primary catchment	411	
Less: *mail order, don't know* ,		
don't do,other, nowhere else (b)	365	
% retained in primary catchment (a/b)	91%	
Total inflows from secondary catchment (c)		4
Survey sample in secondary catchment (d)		92
inflows as % of primary catchment (c/b)		1%

Source: NEMS household survey, February 2013- w eighted

Composite all convenience patterns

From other studies, the value of top up shopping is typically 20%-25% of total convenience spending. Here it is assumed to be **20%**

Weighting for main food: most visited and less visited stores

	frequency of visit	% doing	weighted	
Most visited stores	1.17	100%	1.17	77%
Less visited stores	0.77	46%	0.35	23%
			1.52	100%

*Combined main food trips retained in primary catchment: (22%*0.77+9%* 0.23) =*	*19%*
All convenience trips retained in primary catchment: (19%*0.8+91%*0.2)	33%
Therefore outflows or leakage =	**67%**
*Combined main food inflows to primary catchment: (0%*0.77+2%*0.23) =*	*0.3%*
All convenience trip **inflows** to the primary catchment: (0.3%*0.8+1%*0.2)	0.3%
Nominal allowance for visitor spending	0.7%
Therefore inflows =	**1%**

Summary of weighted components: (rounded)

Main food- most visited stores	*62%*
Main food- less visited stores	*18%*
Top up food shopping	*20%*
All convenience shopping	*100%*

Appendix 4

Comparison expenditure- special forms of retailing

The table below underpins Table 5.1 and 5.2.

Proportion of special forms of retailing, including Internet expenditure, showing projected showing projected increases %			
	2013	2018	2023
All comparison goods	14.7%	16.9%	18.1%
Note: The proportions derivefrom the *Pitney Bowes Retail Expenditure Guide 2012-13, Table 3.1 from non-store retail sales-* broad definition (high case)			

Appendix 5

Household survey: comparison shopping patterns

Q18 Destinations visited most often for clothes, shoes and personal goods shopping Percentages are rounded		
Destination	From primary catchment sample nos	From secondary catchment sample nos
Auchterarder primary catchment (a)	18	3
Survey sample in primary catchment		
Less: *mail order, don't know , internet*		
don't do,other, nowhere else (b)	353	
% retained in primary catchment (a/b)	5%	
Total inflows from secondary catchment (c)		3
Survey sample in secondary catchment (d)		92
inflows as % of primary catchment (c/b)		1%
Source: NEMS household survey, February 2013- w eighted		

Q19 Destinations visited most often for household goods- furniture, carpets, fridges, washing machines, vacuum cleaners and DIY -(i.e. bulky goods)		
Percentages are rounded ***Destination***	From primary catchment sample nos	From secondary catchment sample nos
Auchterarder primary catchment (a)	27	2
Survey sample in primary catchment		
Less: *mail order, don't know , internet*		
don't do,other, nowhere else (b)	315	
% retained in primary catchment (a/b)	9%	
Total inflows from secondary catchment (c)		2
Survey sample in secondary catchment (d)		92
inflows as % of primary catchment (c/b)		1%
Source: NEMS household survey, February 2013- w eighted		

Composite all comparison shopping patterns-from survey		
Weighting	£	
All comparison spend per capita Perth & Kinross	3,145	
(from AnySite report for 2010 in 2010 prices)		
Household or bulky goods	754	24%
Personal goods	2,391	76%
Retained expenditure in primary catchment: (5%*0.76+9%*0.24)=		6%
Therefore outflows or leakage =		**94%**
Inflows to primary catchment: (1%*0.76+1%*0.24)=		**1%**

Adustments

The survey based leakage of 94% is too high to support the catchment floorspace. Therefore assumed leakage of **87%** is more realistic to achieve the turnover/ floorspace ratios shown in Table 5.4 (which are simply assumed reasonable average turnover ratios).

The survey based inflows of 1% do not take account of visitor spending at Eaglesgate. Therefore an additional 4% inflow should be added, to make the total inflows **5%**- see Table 5.4.