Perth & Kinross Council

Perth & Kinross Retail Study and City & Town Centre Review 2014

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Planning & Development Consultancy

In association with **Ryden**

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1 Introduction

1.1 Study Brief

1.1.1 **Roderick MacLean Associates Ltd,** in association with **Ryden**, was commissioned by Perth & Kinross Council in March 2014 to prepare this study. It comprises forecasts of spare retail expenditure capacity for the Council area up to 2024, together with health checks for Perth City Centre and for the town centres of Crieff and Kinross.

1.1.2 The study updates and replaces the Perth & Kinross Retail Review 2011, with wider-ranging research. The objectives of the 2014 study are to provide up to date information and analysis to support the Council's retail and town centre-related planning policies, with the key focus on maintaining and enhancing the vitality and viability of Perth City Centre and other town centres in the network of centres. The research will also assist development management.

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

- Survey based information on consumers' views and uses of Perth City Centre and six other town centres (Aberfeldy, Auchterarder, Blairgowrie, Crieff, Kinross and Pitlochry);
- Identification of trends in town centre uses, especially convenience and comparison retailing, and the implications for Perth & Kinross;
- Identification of any shortfalls and opportunities for retail/ commercial/ leisure provision in Perth & Kinross;
- Assessment of potential improvements to Perth City Centre, including the night time economy, dwell time and parking provision.

1.1.4 Specific information is sought on a number of topics, including both quantitative and qualitative aspects:

- Identification of the main catchment areas for Perth and the other main towns, based on the five sub areas in the 2011 Study;
- Estimation of retail shopping patterns (inflows and outflows) for each sub area, based on a household survey and other sources showing inflows to the Council area;
- Identification of the mix and diversity of retail and non-retail floorspace in the specified town centres, including commercial and leisure, together with retail floorspace elsewhere in the Council area for the capacity analysis;
- Information on retail expenditure trends, including online shopping;
- Assessment of the likely effects of improvements to Dundee and Stirling City Centres on Perth & Kinross, and how to respond to the competition;
- Forecasting the convenience and comparison retail expenditure capacity for the next five and ten years for the five sub areas and for the Council area;
- Conduct health checks on Perth City Centre, Crieff and Kinross town centres to measure their vitality and viability, using market indicators, vitality indicators and qualitative indicators.

1.2 Surveys

1.2.1 The study is supported by three different surveys. NEMS Market Research undertook a telephone interview survey of a sample of 1,250 households in Perth & Kinross. NEMS also conducted a survey of a sample of business and retailer occupiers in Perth City Centre and in the town centres of Crieff and Kinross. Details of these surveys are provided in section 5.

1.2.2 PMRS Ltd conducted pedestrian footfall counts in Perth City Centre and in the town centres Crieff and Kinross as part of the health check analysis.

1.3 Retail capacity forecasts

1.3.1 The forecasts of spare retail expenditure capacity are for **2014-19** and cumulatively for **2014-24**. All values are expressed in constant **2012 prices**.

2 Retail catchment areas and population

2.1 Sub area retail catchments

2.1.1 The study references the same five sub areas for retail analysis, as in the 2011 Retail Review. These areas also form the basis for the spatial strategy in the recently adopted Perth & Kinross Council Local Development Plan (February 2014).

2.1.2 The sub areas include Perth, Kinross, Strathearn, Highland and Strathmore & the Glens, as illustrated on Map 2.1. The postcode sectors comprising the sub areas are shown in Appendix 1.

2.1.3 For Perth, the sub area represents the primary catchment, with the secondary catchment covering the rest of the Council area. For Kinross, the sub area represents the retail catchment of the town.

2.1.4 Crieff and Auchterarder share the Strathearn sub area and the town catchments are indicated in Appendix 1, based on the postcode sectors shown. It should be noted that Auchterarder was the subject of a retail capacity study and health check in 2013, which included a 500 sample household survey. In fact the Auchterarder primary catchment overlaps slightly with Perth, which is not shown in Appendix 1 and the Auchterarder Retail Study should be referenced for greater precision.

2.1.5 Aberfeldy and Pitlochry share the Highland sub area. The primary catchment areas for these towns are also shown in Appendix 1. These areas should be referenced for development management purposes.

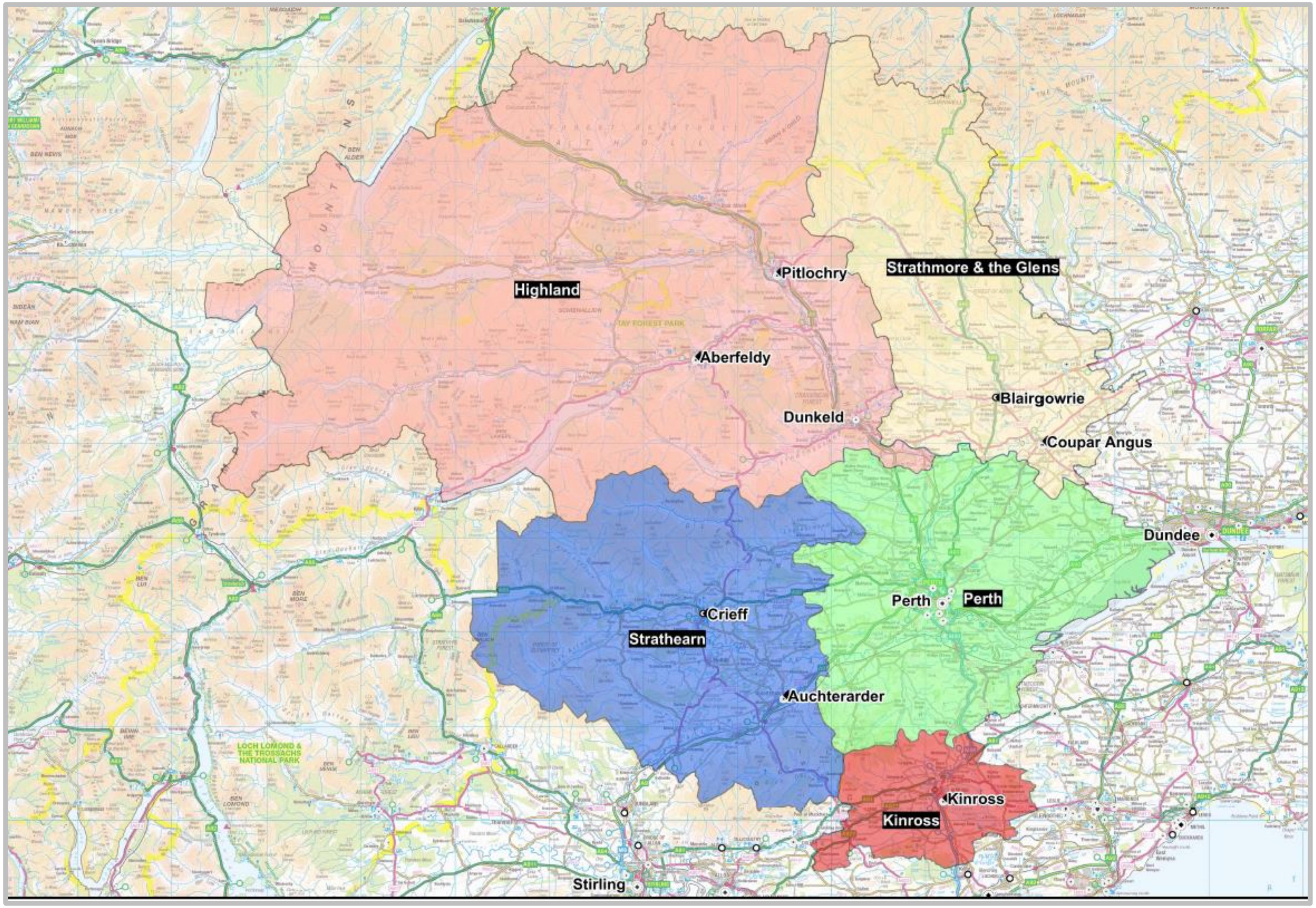
2.2 Population projections

2.2.1 The current and projected populations for Perth & Kinross and the sub areas are shown on Table 2.1.

Table 2.1
Perth & Kinross Council area: population projections

Sub area	Census 2011	2014	2019	2024
Perth	83,783	85,762	89,648	93,876
Kinross	11,940	12,222	12,776	13,378
Strathearn	20,238	20,716	21,655	22,676
Highland	11,516	11,788	12,322	12,903
Strathmore & the Glens	19,175	19,628	20,517	21,485
Total Perth & Kinross Council area	**146,652**	**150,116**	**156,918**	**164,318**

Note
Sub area populations from the 2011 Census are shown in Appendix 1
The RG 2012 based population projections for Perth & Kinross Council area applied for 2014, 2019 and 2024, with apportionment to the sub areas.



Map 2.1 Perth & Kinross- five sub areas

3 Town centre and retail planning policies

3.1 Introduction

3.1.1 This section provides a summary of the current and emerging planning policy framework in Perth & Kinross, as it relates to town centres and retailing.

3.2 Current Scottish Planning Policy (SPP)

3.2.1 Published in 2010, the SPP identifies town centres as a key element of the economic and social fabric of Scotland. Town centres should be the focus for a diversity of uses, including retail, leisure, entertainment, recreation, cultural and community facilities, homes and businesses. The SPP requires the development of a network of centres, with each centre having a defined role within the network. Town centre health check monitoring is needed to assess any changes in the roles of centres over time.

3.2.2 Improvement to town centres are promoted by the SPP, including quality of the built environment, accessibility, realisation of development opportunities, the evening economy, vitality and other qualities. Town centre strategies are the key to realising improvements and the SPP provides a summary structure of assessment and monitoring to achieve this.

3.2.3 The current SPP contains a list of key health check indicators to assess the vitality and viability of town centres:

- Pedestrian flow;
- Prime rental values;
- Space in use for different town centre uses and how has changed;
- Retailer representation and intentions;
- Commercial yields;
- Vacancy rates;
- Physical structure of the centre, including opportunities, constraints and accessibility;
- Periodic surveys of consumers; and
- Crime rates

3.2.4 Application of the sequential test is required to direct new retail and commercial leisure developments to town centres as a priority over other locations. The order of priority is: town centres, edge of centre locations, other types of centre and out of centre locations which are accessible by a variety of transport modes.

3.3 Draft Scottish Planning Policy

3.3.1 The Consultation Draft SPP was published in April 2013 and the final SPP will be published in June 2014. The main change in emphasis compared to the current SPP is the greater focus on encouraging the diversity of uses and vitality within town centres generally, alongside improvement to the quality of the centres as places to live and work. It proposes a holistic approach, with less singular focus on retailing and commercial leisure.

3.3.2 Additional health check indicators are proposed (alongside those in the current SPP), in order to assess town centres more fully. These include regular monitoring of the following town centre characteristics:

- Employment;
- Cultural and social activity;
- Leisure facilities; and
- Residential population

3.3.3 The draft also invites consideration of whether all significant footfall uses should be subject to the sequential test.

3.3.4 There is more detail on the development of town centre strategies in the draft SPP, especially on the need for local authorities to work with partners and engage the community. This requires establishment of long term visions for town centres; identify the potential for change; constraints; promotion of opportunities through funding; masterplanning and design, increased accessibility and other issues. All this supports the 'Town Centres First' policy in the draft document.

3.3.5 Also, the draft SPP contains a summary of key characteristics which must underpin the definition of a town centre in development plans:

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

3.3.6 The replacement SPP will contain some amendments. In the Consultation Responses to the draft SPP (published September 2013), nearly 90% of the respondents favoured town centre health checks, and overwhelming support for the proposal that local authorities should prepare town centre strategies.

3.4 National Review of Town Centres

3.4.1 The External Advisory Group's Report to the Scottish Government entitled *Community and Enterprise in Scotland's Town Centres* was published in June 2013. This document sets out a 'Town Centres First' principle, where the health of town centres is given central focus in planning for the future, with an emphasis on promoting diversity of activity within them. It has not been formally adopted by the Scottish Government, though.

3.4.2 The report draws attention to the importance of generating footfall as the key to successful town centres. This requires investment in town centres and the attraction of a range of footfall generating activities. Attention is drawn to the benefits of attracting new housing, creating accessible public services, community projects, arts and commercial opportunities to town centres. There is an emphasis on developing community engagement to realise this potential. The report contains a number of recommendations on how to stimulate this process, including funding, co-operation between organisations and establishing wider information systems, such as greater awareness of existing site/ property development opportunities in the town centres.

3.4.3 Under the 'Town Centres First' outlook, the report recommends that the current sequential test in planning policy should be applied to all footfall creating uses, giving priority to town centres as the preferred location.

3.4.4 Related recommendations include: evaluation of development of a single town centre use class; incentives to developers by reducing their usual contributions; application of a wider cost benefit appraisal of development proposals on an 'in-town centre' versus 'out of centre' approach; and proactive compulsory purchase orders to stimulate vacant and under-used land in town centres. It is also recommended that a 'masterplanning' toolkit is developed for communities to assist promote their vision within planning polices for the town centres.

3.4.5 In summary, the report by the External Group encourages a holistic approach to developing town centres, well beyond the current emphasis on retailing. It reinforces the provisions of the draft SPP policy on town centres in terms of the need to review the overall health of town centres.

3.4.6 The Scottish Government responded to the External Review Group's Report in November 2013, with publication of their *Town Centre Action Plan*. This political document sets out a number of action points. These include:

- How to make the 'town centre first' policy work in practice;
- Support for housing in town centres;
- Economic support/ business development
- Support for community involvement;
- Increase access to public services;
- Provision of digital technology; and
- Promotion of pro-active planning.

3.5 Current TAYplan

3.5.1 The current TAYplan was approved in June 2012, for the period 2012-32. On town centres, the document briefly summarises the aims of the current SPP, including the sequential test. As a strategic plan, the focus is on identification of the hierarchy of centres, and the TAYplan aims to focus the majority of development in the largest settlements. It adopts a three tier spatial strategy, which is re-iterated for Perth and Kinross in the Local Development Plan, as described later in this section.

3.5.2 Under Policy 7 of the TAYplan, comparison retail development is to be focussed on the centres identified in Table 2 (of the TAYplan), with the largest scale of activity in the largest town centres. This table is reproduced as at the end of this section.

3.5.3 Local Development Plans (LDPs) should identify the boundaries for each town centre listed under Table 2. LDPs can also identify roles for 'other service' centres, beneath the regional hierarchy. These can include commercial centres for leisure, bulky goods and other retail. Similarly, the role of local centres for convenience and comparison retailing can be included. LDPs should also support a mix of uses in city and town centres that encourage their vitality and diversity of economic and social activity, both during the day and in the evening.

3.5.4 Planning decisions should be based on the justification of planning proposals combining the hierarchy in Table 2, with application of the sequential test and other considerations as appropriate.

3.6 Emerging TAYplan 2

3.6.1 Consultation will begin on April 15th 2014 on the Main Issues Report for the second TAYplan.

3.7 Perth & Kinross Council Local Development Plan

3.7.1 **Policies**: the Perth & Kinross Council LDP was adopted in February 2014. It replaces the previous local plans. The LDP spatial strategy relates to the framework of the five sub areas described in section 2, although the Cairngorm National Park extends into the northern part of the Council area. Also, the Loch Lomond and Trossachs National Park extends into the western part of the Council area.

3.7.2 The LDP refers to the sub regional status of Perth and its role as the main shopping centre for Perth & Kinross- see Map 3.1. It has a competing/ complementary relationship to Dundee and other centres. In addition to the eight small town centres in Perth & Kinross identified in the TAYplan, the LDP identifies commercial centres at: St Catherine's Retail Park, Crieff Road and Dunkeld Road and the Highland Gateway at Inveralmond. There are neighbourhood centres at Bridgend, Craigie and Rannoch Road- see Map 3.2.

3.7.3 Under *Policy RC 1*- Class 1 retail uses are encouraged in the town & neighbourhood centres, with larger retail floor plates encouraged in the town centres. Class 2 and 3 uses are encouraged at ground floor level, where proposals support the vitality, viability and character of the town centres. On upper floors, use for housing is encouraged where appropriate.

3.7.4 Under *Policy RC2*- a mix of uses is encouraged within the secondary areas of Perth City Centre, including shops, offices, restaurants, residential, clubs and pubs. Specialist shops are especially encouraged. The uses must not adversely affect amenity.

3.7.5 Under *Policy RC3*- proposals for retail development are encouraged, although there will be restrictions in some cases.

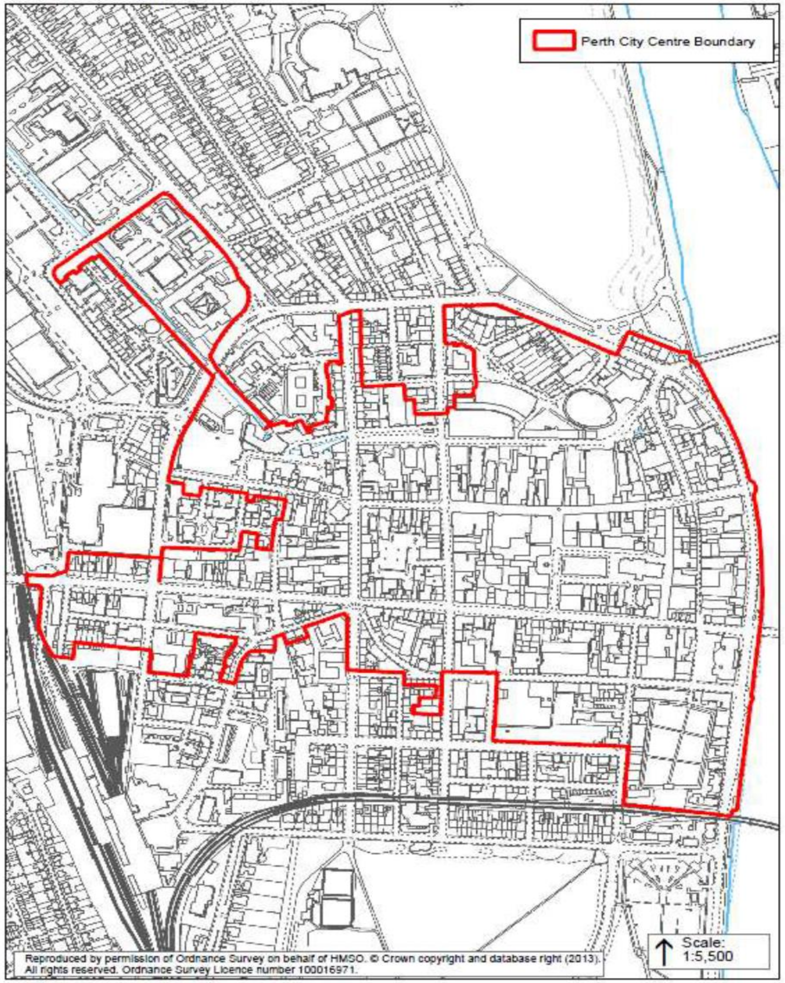
3.7.6 Under *Policy RC4*- proposals for retail and leisure development will follow the sequential test in the following order of preference:

1. Within town centres
2. Edge of town centre sites
3. Identified commercial centres
4. Out of centre locations easily accessible by a range of transport modes

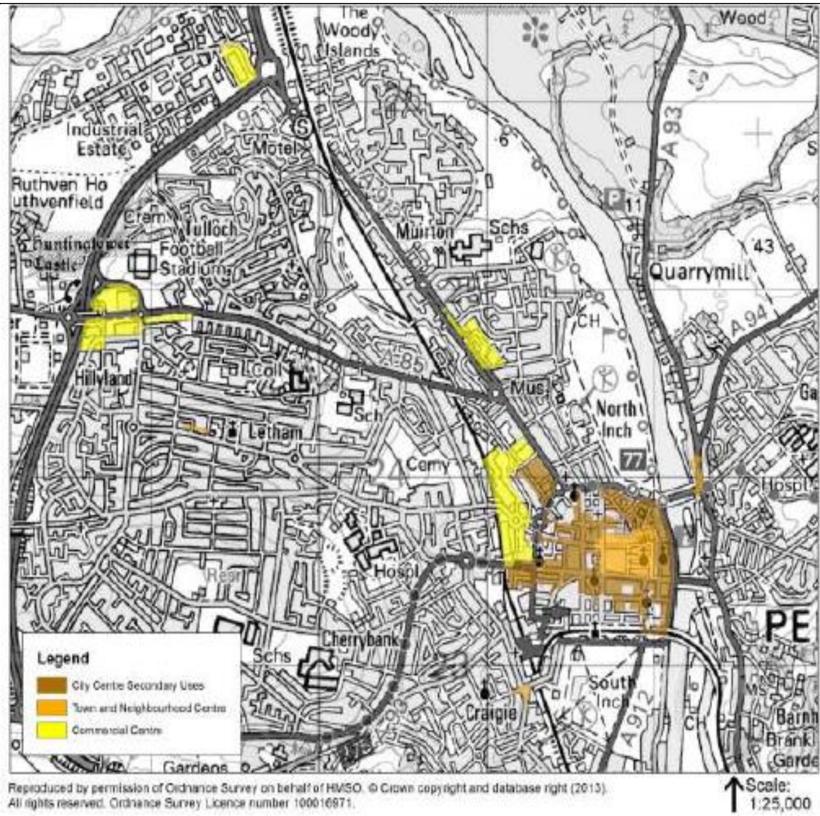
3.7.7 Retail and leisure developments of 1,500 sq m gross or more, will require a retail, leisure or transport assessment if the location is outwith the town centre boundary and not in accordance with the development plan. Proposals outwith town centres require to meet a set of criteria set out in the LDP. Also, the Council will consider the need for restrictions on mezzanine floors and the level of comparison floorspace in supermarket proposals, for developments outwith town centres.

3.7.8 Under *Policy RC5*- proposals to modify planning controls on retail floorspace or the range of goods for sale must be justified by a health check, a retail impact assessment and

Map 3.1 Perth City Centre



Map 3.2 Perth Retail Centres



Reproduced from the Perth & Kinross Council Local Development Plan 2014 a transport assessment if applicable. A set of criteria to address is set out in the LDP.

3.7.9 **Spatial Strategy:** following the TAYplan, the LDP sets out the tiers:

Tier 1 Perth Core Area- to accommodate the majority of new development

Tier 2 Regional Service Centres- Kinross/ Milnathort, Blairgowrie/Rattray and Crieff to accommodate a small share of development

Tier 3 Local Service Centres- Auchterarder, Aberfeldy, Pitlochry, Dunkeld/ Birnam, Coupar Angus and Alyth to accommodate a small share of development which is more about sustaining them.

3.7.10 The Spatial Strategy is based on the five sub areas referred-to in section 2, aside from that part of the Council area within the Cairngorms National Park.

3.7.11 **Retail Strategy- overall:** paragraph 4.3.6 of the LDP refers to the limited quantitative need for more convenience floorspace from the previous Council studies (the position is updated by this report). Proposals in Perth which improve the quality and distribution of convenience retailing could be supported. The LDP identified a need for additional comparison retail floorspace which will be directed to the town centres.

3.7.12 In the **Perth area**, the LDP emphasises the sub regional role of the City Centre and refers to its prime retail core areas around High Street, St John's Street, George Street, Mill Street, Scott Street and South Street. Larger units are encouraged in these areas. Reference is made to the commercial centres identified earlier in this section as shown in Map 3.2. The LDP supports improved linkages between the City Centre, St Catherine's Retail Park and other retail developments.

3.7.13 In the **Kinross area**, the LDP mentions that development of the Sainsbury's supermarket means that a requirement for an additional large supermarket is not anticipated.

3.7.14 In **Strathearn,** the LDP refers to the importance of Crieff and Gleneagles for tourism. There is planning consent for a new supermarket in Crieff, which will serve local needs. Planned growth in Auchterarder is likely to require additional supermarket provision in the future.

3.7.15 In the **Highland area**, the LDP identifies Pitlochry, Aberfeldy and Dunkeld as important local shopping and commercial centres, with Pitlochry as a focus for tourism. There is planning consent for a Sainsbury's supermarket in the town.

3.7.16 In **Strathmore & the Glens**, the LDP refers to the Tesco at Blairgowrie as contributing to lowering expenditure leakage from the area and the expectation that the supermarket consent in Pitlochry will also serve the northern part of Strathmore.

3.7.17 The next section reviews the retail and leisure market.

Current TAYplan- comparison retail centres

Table 2: Hierarchy of Comparison Retail Centres

Hierarchy of Comparison Retail Centres					
Regional Centre	Dundee City Centre				
Sub-regional Centre	Perth City Centre				
Larger Town Centres	Arbroath	Cupar	Forfar	Montrose	St Andrews
Smaller Town Centres	Aberfeldy Alyth Anstruther	Auchterarder Blairgowrie Brechin	Carnoustie Coupar Angus Crieff	Kirriemuir Kinross Monifieth	Newburgh Pitlochry
Commercial Centres	Gallagher Retail Park	Kingsway East	Kingsway West	St. Catherine's Retail Park (Perth)	

4 Retail and leisure market overview

4.1 Introduction

4.1.1 This section provides commentary on general trends in the retail market in Scotland, partly based on an overview by Ryden from their Scottish Property Review and other sources, together with more specific commentary for Perth & Kinross.

4.2 Market context

4.2.1 Scottish economic growth for 2013 was 1.6%. The fourth quarter of 2013 recorded only 0.2% growth, however this is attributed to particular events at Grangemouth refinery and the underlying trend remains stronger. Growth is now entrenched across the economy and forecasters expect this to continue, indicating 2.3% for 2014 and again in 2015 (source: Fraser of Allander Institute). This improving economic performance is not, however, flowing through immediately into improved retail sales growth.

4.2.2 **Retail spending-** The most recent Scottish Retail Consortium survey indicates a 3.8% fall in like-for-like sales over the twelve months to March 2014. The drag effect of weak income growth allied to high household debt is likely to explain the lack of expenditure growth recovery, although the more specific impact of the timing of Easter also plays a part. Scottish Government data reports static retail sales in Quarter 1 of 2014 but a rising 12-month trend, up by 2.5% in the 12 months to April 2014.

4.2.3 Looking to the future, [1]Pitney Bowes forecast an average growth rate of 0.8% per annum for convenience retail expenditure and 3.7% per annum for comparison expenditure for the UK up to 2023.

4.2.4 **Internet spending-** At a market-wide level, the continued migration of expenditure to on-line retailing is affecting growth potential. Pitney Bowes forecast that non-store comparison spending could rise to 17.6% in 2023 in the UK, from 14.3% in 2012.

[1] Oxford Economics – PB Expenditure Guide 2013-14.

4.2.5 **Other retailing trends-** also negatively affecting many town centres is the expansion by out-of-centre superstores, at least until very recently, which diverted potential growth. Superstores are now much less active, with only ASDA still clearly in expansion mode, and the focus has shifted to small convenience stores and discounters.

4.2.6 The ultra-long term concentration of retail activity into larger destination centres – as shoppers travel further to spend more in locations with more choice - has a negative effect upon town centres lower down the shopping hierarchy.

4.2.7 Dis-investment by national retailers is an important backcloth to current market activity and future potential. While high profile collapses, such as Comet, Blockbusters, Jessops and most recently Barratts and Internacionale attract headline attention, there is a wider and ongoing market attrition as retailers reaching the end of leases examine very closely which locations are delivering acceptable performance and which are not.

4.2.8 Retail chains pruning their branches in this way include Thorntons, HMV (following restructuring), New Look, Argos and Arcadia Group[2]. This underlying market activity again tends to favour larger centres. For example HMV recently closed all of its stores then re-opened only selectively; the store on Edinburgh's Princes Street re-opened while those in Perth, Kirkcaldy, Dumfries and Falkirk did not.

4.2.9 On the more positive side however, the very recent re-emergence of the retail/leisure mix is evident at a market-wide level, as landlords and authorities seek to maximise dwell-time and expenditure in their centres.

[2] Arcadia brands are BHS, Burton Menswear, Dorothy Perkins, Evans, Miss Selfridge, Top Shop, Top Man, Outfit & Wallis

4.2.10 **Leisure market trends-** the growth of the leisure property industry is currently about diversification of shopping destinations, rather than significant expansion of the available market. ONS data indicates that household expenditure on recreation, culture, restaurants and hotels was £102 per week in 2012, down from a peak of £105 in 2008 (figures are in 2012 prices). Leisure expenditure is discretionary however, and would be expected to resume growth as household finances improve over time through wage increases and gradually reducing debt.

4.2.11 Cinema and restaurants mixes are currently being added at Buchanan Galleries and Silverburn Shopping Centre in Glasgow, Fort Kinnaird in Edinburgh, Wellgate Shopping Centre in Dundee and at the Eastgate Shopping Centre in Inverness.

4.2.12 The market response to these challenges is to invest only selectively, in prime locations. Most medium to larger towns, which traditionally attracted retail development and investment, have very little activity ongoing or planned. Thus, there is a long term trend towards a *concentration of retail capital*.

4.2.13 **Retail rents (national trends)**- this long term trend towards concentration of retail capital is revealed by Ryden's retail rent index for Scotland's top twenty centres. The index has fallen by 19% since 2008, but within that, Glasgow's prime rents have increased by 2% and Edinburgh's also show recent resilience. Perth's prime rents have fallen by 10% since 2008, which is a better outcome than average across the top twenty centres.

4.3 Town centre floorspace

4.3.1 Prior to our market commentary on Perth, Crieff and Kinross, the level and diversity of floorspace in the main town centres is shown in Table 4.1 at a broad level, distinguishing retail from other uses. This is illustrated in the associated pie charts. Table 4.2 shows a further breakdown of the other occupied floorspace by type of use, divided into six categories, including leisure-related uses. Further analysis is provided in this section and in section 6 (health checks).

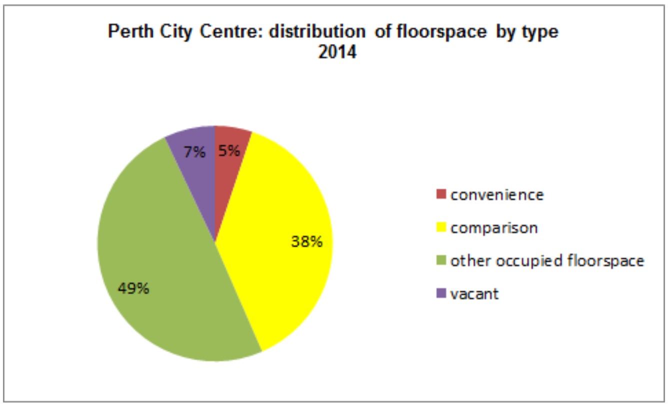
4.4 Vacancy rates

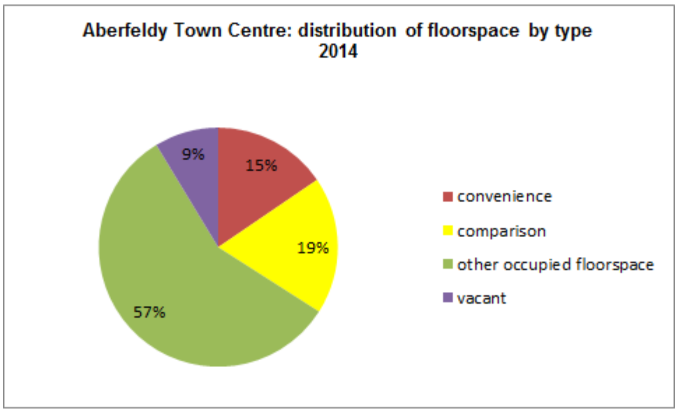
4.4.1 The vacant floorspace in Perth & Kinross is shown in Table 4.1. However, vacancy rates are commonly expressed in terms of the numbers of vacant units, which allows comparison with national averages from information collected by agencies such as LDC and the Scottish Retail Consortium. Table 4.3 shows the vacancy rates in the main towns in the Council area, which indicates that the highest vacancy rates are lower than the national average. The highest vacancy rate is in Kinross. The vacancy rates in Dundee, Stirling and Inverness are shown for comparison.

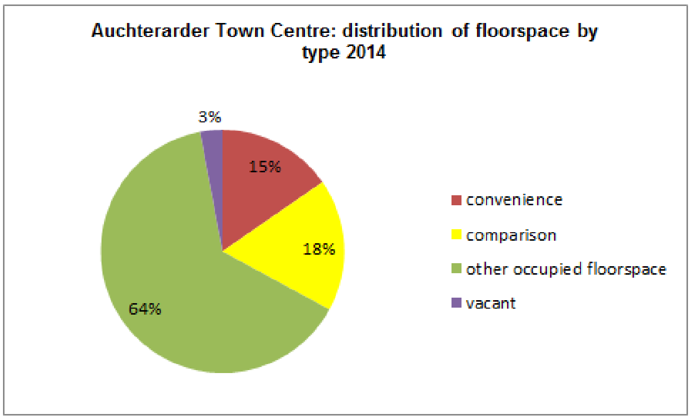
Table 4.1
Retail and all other occupied floorspace and vacant floorspace recorded the main town centres in Perth & Kinross 2014- sq m gross
(based on 2013 survey data)

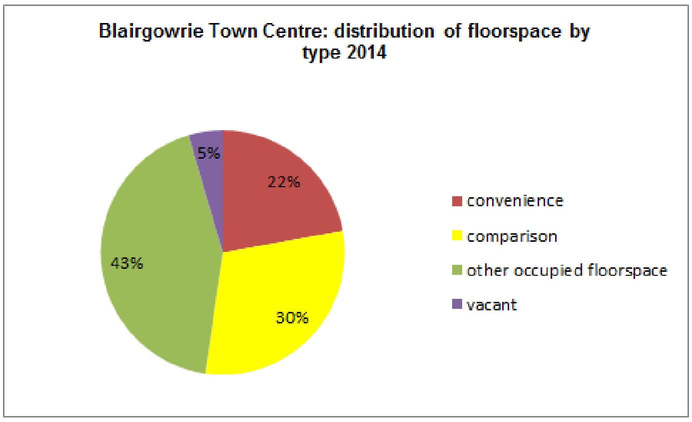
	Convenience floorspace		Comparison floorspace		Other occupied floorspace		Vacant floorspace		Total
	sq m gross 2014	% of total	sq m gross 2014	% of total	sq m gross 2014	% of total	sq m gross 2014	% of total	sq m gross
Perth City Centre	8,357	*5%*	62,420	*38%*	80,600	*49%*	11,520	*7%*	162,897
Other town centres									
Aberfeldy TC	1,500	*15%*	1,800	*19%*	5,550	*57%*	840	*9%*	9,690
Auchterarder TC	1,463	*15%*	1,675	*18%*	6,110	*64%*	280	*3%*	9,528
Blairgowrie TC- incl. Tesco	6,990	*22%*	9,722	*31%*	13,630	*43%*	1,430	*5%*	31,772
Coupar Angus TC- excl Co-op (o/c)	600	*17%*	800	*23%*	1,240	*35%*	900	*25%*	3,540
Crieff TC	2,920	*13%*	5,720	*26%*	10,790	*49%*	2,580	*12%*	22,010
Kinross TC- excl. Sainsbury's (o/c)	950	*13%*	1,190	*16%*	4,200	*56%*	1,190	*16%*	7,530
Pitlochry TC	2,330	*11%*	5,430	*25%*	12,550	*58%*	1,410	*6%*	21,720

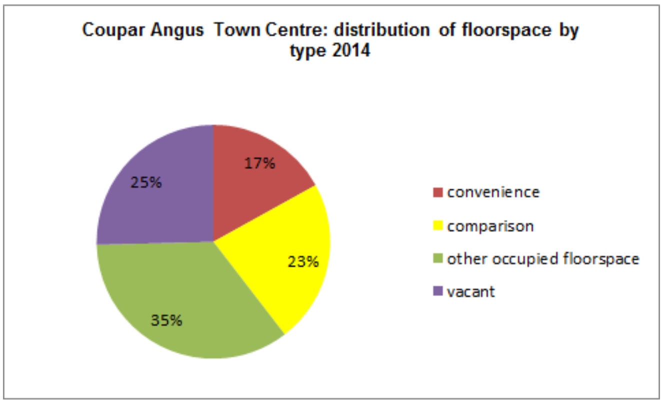
Sources: Mainly Goad 2013, with street count for Coupar Angus. Mosly Council data for supermarkets, adjusted to remove non-food floorspace.
Vacant includes retail and non retail floorspace

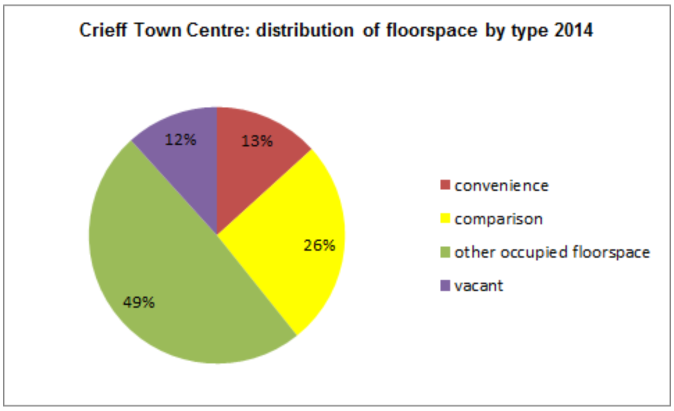

Perth City Centre: distribution of floorspace by type 2014
7%
5%
38%
49%
convenience
comparison
other occupied floorspace
vacant

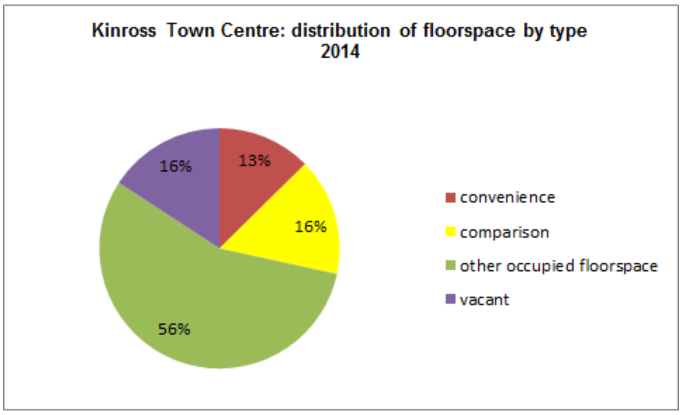

Aberfeldy Town Centre: distribution of floorspace by type 2014
9%
15%
19%
57%
convenience
comparison
other occupied floorspace
vacant


Auchterarder Town Centre: distribution of floorspace by type 2014
3%
15%
18%
64%
convenience
comparison
other occupied floorspace
vacant


Blairgowrie Town Centre: distribution of floorspace by type 2014
5%
22%
43%
30%
convenience
comparison
other occupied floorspace
vacant


Coupar Angus Town Centre: distribution of floorspace by type 2014
17%
25%
23%
35%
convenience
comparison
other occupied floorspace
vacant


Crieff Town Centre: distribution of floorspace by type 2014
12%
13%
26%
49%
convenience
comparison
other occupied floorspace
vacant


Kinross Town Centre: distribution of floorspace by type 2014
16%
13%
16%
56%
convenience
comparison
other occupied floorspace
vacant

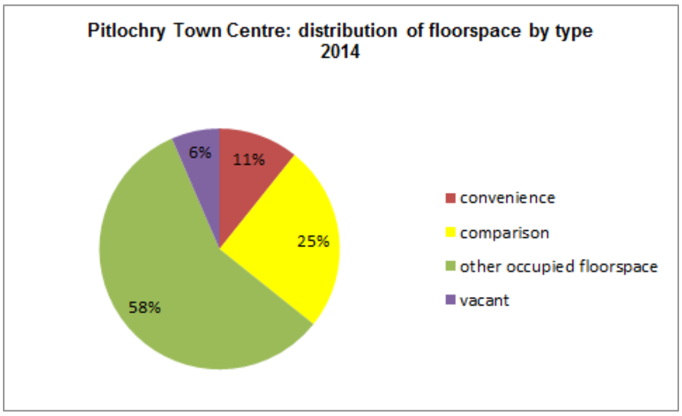

Pitlochry Town Centre: distribution of floorspace by type 2014
6%
11%
25%
58%
convenience
comparison
other occupied floorspace
vacant

Table 4.2
Distribution of other occupied floorspace in the town centres by type of use

	Other occupied town centre floorspace	based on Goad 2013 Perth City Centre		Street survey 2013 (Council) Aberfeldy TC	
Type			%		%
1	Restaurants, cafes, pubs, take aways	21,330	26%	2,250	41%
2	Other services-hair,cleaners, travel agents etc	8,280	10%	750	14%
3	Banks, BS, financial services, insurance	4,480	6%	600	11%
4	Property, offices and professional services	6,650	8%	1,050	19%
5	Leisure, gaming, halls cinemas, libraries etc	16,930	21%	600	11%
6	Public services, PO and other miscellaneous	22,930	28%	300	5%
	Total	80,600	100%	5,550	100%

	Other occupied town centre floorspace	based on Goad 2013 Auchterarder TC		based on Goad 2013 Blairgowrie TC	
Type			%		%
1	Restaurants, cafes, pubs, take aways	2,450	40%	4,040	30%
2	Other services-hair,cleaners, travel agents etc	1,170	19%	1,190	9%
3	Banks, BS, financial services, insurance	390	6%	1,580	12%
4	Property, offices and professional services	400	7%	500	4%
5	Leisure, gaming, halls cinemas, libraries etc	850	14%	2,500	18%
6	Public services, PO and other miscellaneous	850	14%	3,820	28%
	Total	6,110	100%	13,630	100%

	Other occupied town centre floorspace	Street survey 2013 Cupar Angus TC		based on Goad 2013 Crieff TC	
Type			%		%
1	Restaurants, cafes, pubs, take aways	240	19%	3,750	35%
2	Other services-hair,cleaners, travel agents etc	240	19%	2,310	21%
3	Banks, BS, financial services, insurance	160	13%	740	7%
4	Property, offices and professional services	320	26%	990	9%
5	Leisure, gaming, halls cinemas, libraries etc	280	23%	780	7%
6	Public services, PO and other miscellaneous		0%	2,220	21%
	Total	1,240	100%	10,790	100%

	Other occupied town centre floorspace	based on Goad 2013 Kinross TC		based on Goad 2013 Pitlochry TC	
Type			%		
1	Restaurants, cafes, pubs, take aways	1,400	33%	4,860	39%
2	Other services-hair,cleaners, travel agents etc	770	18%	560	4%
3	Banks, BS, financial services, insurance	290	7%	550	4%
4	Property, offices and professional services	260	6%	870	7%
5	Leisure, gaming, halls cinemas, libraries etc	130	3%	4,680	37%
6	Public services, PO and other miscellaneous	1,350	32%	1,030	8%
	Total	4,200	100%	12,550	100%

Table 4.3
Vacant units in Perth City Centre and six other town centres- 2014

	Vacant units	Total units	Vacancy rate %
Perth City Centre	71	642	11.1%
Crieff	13	167	7.8%
Kinross	8	58	13.8%
Aberfeldy	7	72	9.7%
Auchterarder	3	86	3.5%
Blairgowrie	10	155	6.5%
Pitlochry	9	107	8.4%
Other City Centres			
Dundee	89	529	16.8%
Stirling	47	372	12.6%
Inverness	56	417	13.4%
Scottish town centre average			14.5%

Note: vacancy rate= vacant units/ (retail and non-retail service units & vacant units)
Sources: Goad 2013 surveys except for Aberfeldy- street count 2013
The selected town centres include those referred to in the brief.
Scottish average- The Local Data Company December 2013

4.4.2 According to the Costar database, there are currently 37 units on the market in the city centre totalling 8,377sq.m. These are vacant units which are being formally marketed to attract new occupiers.

4.5 Perth market review

4.5.1 As the largest centre in Perth & Kinross and as one of Scotland's successful small cities, Perth sits reasonably high up the Scottish retail hierarchy. Consequently, while Perth is affected by the market challenges and dis-investment trends described earlier, it also retains the potential to continue to attract new investment.

4.5.2 There has been no major retail development in Perth in recent years. An extension to St Johns Shopping Centre was completed in 2013 comprising two retail units totalling 2,500 sq.m.; as well as these unit additions to the centre a general refurbishment took place. The former Woolworth's store on the High Street was redeveloped into two retail units during 2011. Meanwhile the City Hall redevelopment continues to stall. Elsewhere at St Catherine's Retail Park refurbishment and redevelopment works are underway. Aldi has planning consent for a new store at the Highland Gateway, to the north of the city.

4.5.3 [3]Multiple retailer representation in the city centre is 30% (82 retail units out of a total of 269 retail units). The city centre has a mix of national multiple retailers, along with local independent stores and chains. Key multiples include *Boots, Next, Marks & Spencers, Primark, Oasis, River Island, Greggs, H & M, Three Store, H Samuel and Ernest Jones and Tesco. Local multiples include Goodfellow and Stevens, Manifesto, and Davidson (chemist).*

4.5.4 Prime Zone A retail rents in Perth city centre are currently about £65 per sq ft. This compares to Dundee at £100 per sq ft, Stirling at £110 per sq ft and Inverness at £80 per sq ft. Perth rental values are ranked twelfth highest out of the twenty largest centres in Scotland. Rents in Perth have fallen by 13% since 2006, compared to a 9% fall in Dundee and no change in Stirling. Rents in Inverness have fallen by 30% over the same period

4.5.5 Both Dundee and Stirling have performed better than Perth, and arguably would be expected to do so based upon market trends favouring the largest shopping destinations, but Inverness performed considerably worse. Overall, Perth has proved

[3] Refers to retailers only, excluding non-retail service multiples

relatively resilient for its size, but it will need to remain competitive against the larger cities. Prime retail yields for Perth are in the range of 7% to 7.5 %.

4.5.6 Recent investment/ arrivals in Perth city centre (mainly in St John's Shopping Centre) by retailers/services since 2013 includes *Crabtree & Evelyn, H&M, River Island, Poundland, Sainsbury's Local, Rohan, Starbucks and Warren James, Byres & Co-jewellers.* Retailers recently located in St Catherine's Retail Park include *Maplin and Home Bargains, with Bensons for Beds* scheduled to open soon. This investment by national chains demonstrates that Perth's prime locations continue to be regarded as investment targets by some of those businesses which have become more discerning in the recent market cycle.

4.5.7 In common with other cities and towns across Scotland however, there have also been numerous store closures in Perth. The highest profiles amongst these were multiple retailers which were over-leveraged, had poor business models or were in sectors where the internet and supermarkets and department stores had eroded their markets and margins. In Perth recent store closures in these categories included *HMV, Game, Blockbuster, Jane Norman, Henderson Jewellers, Laura Ashley, Comet (St Catherine's) and Sweet Success.*

4.5.8 Looking to new demand to invest in Perth, there are currently ten operator requirements, of which five are retailers and five are services. These are shown in Table 4.4, along with their indicative floorspace requirements. This level of requirements is lower than for larger cities, but is still more than many traditionally strong town centres. Nevertheless, it is well below the level of vacant floorspace in the city centre currently being marketed (37 units), which suggests that many of these units do not match modern multiple requirements, which is common to most historic town centres.

4.5.9 The mix shows the importance of non-retail services, including leisure-related services, in the total demand. The total level of requirements is much reduced from 2006, when there were 17 operator requirements, of which around half have been met in Perth in the intervening period.

4.5.10 Importantly, Ryden note that, since January 2010 there have been 114 retail deals recorded in Perth totalling 20,773 sq.m, which equates to nearly 5,000 sq.m. per annum. This information presents a much more comprehensive view of the Perth retail market than just the list of property requirements by multiples alone, as it includes independent retailers and investors, which reflects the underlying strength of Perth.

Table 4.4
Retailer requirements to locate in Perth 2014

	Type	**Size (sq.m.)**
Retailer		
Bargain Book Time	Books / stationery	93 – 279
Farmfoods	Supermarket	557 – 743
Deichmann	Shoe retailer	372 – 557
Topps Tiles Plc	Tiles	279 – 743
Aldi (South Perth), in addition to Inveralmond	Supermarket	604 – 1,486
Sub total retail		**1,905 - 3,808**
Services/other		
Vets4Pets Ltd	Service / specialist	93 – 186
Halfords Ltd	Auto parts (non-retail)	325 – 743
Papa Johns	Café / Restaurant / Bar	79 – 93
Marstons Inns	Café / Restaurant / Bar	581 – 883
Pizza Hut Delivery	Take-away	9 – 93
Sub total services/ other		**1,087 - 1,998**

Source: Ryden

4.5.11 On convenience retailing, there is no main supermarket representation by Sainsbury's in Perth, aside from their Local store in the city. There is no Waitrose either.

4.5.12 St Catherine's Retail Park is closely linked to the city centre and it represents an opportunity to provide for large space users, who would otherwise not be able to locate in the Perth. Recent relaxations on the conditions restricting ranges of goods are testimony to this.

4.5.13 While Dundee is a larger centre with a much greater representation by national multiples, Perth's strong independent retail sector underpins much of its success. It also serves to complement the different offer in Dundee.

4.5.14 Therefore, to maintain and improve Perth's position, it will be essential to provide retail development which meets the requirements of both multiples and the independent operators.

4.5.15 Information from the business occupiers' survey in section 5 provides an indication of the business outlook among the retailers and other businesses in Perth city centre.

4.6 Perth leisure

4.6.1 From Table 4.2, there are 102 food and drink units (bars, restaurants, take-aways, public houses, cafes) in Perth city centre totalling 21,330 sq.m. and a further 25 units totalling 16,930 sq.m. classed as leisure (bingo & amusements, betting offices, cinema, theatre, clubs, nightclubs, hotel, guest houses, galleries and libraries). An IMAX cinema facility is being developed and the theatre is under refurbishment-see Perth health checks in section 6. Perth is the main centre for leisure in the Council area and reference to the out of centre leisure facilities is included under the health check.

4.6.2 Since 2010, there were eight leisure deals totalling around 2,800 sq.m, comprising a café, two public houses and five restaurants. Premier Inn is currently constructing an 83-bedroom hotel on Mill Street, which will sit alongside Perth Concert Hall. Retail space will also be included here along with a Costa coffee outlet.

4.7 Competition from Dundee and Stirling

4.7.1 We have already commented on the role of Dundee as the largest centre for multiple retailers in the TAYplan area, and that Perth should work to its strength in the quality independent retail sector, and as a pleasant destination for visitors and day trippers from a wide area. On account of its location, Perth has a wide retail catchment which gives it a strong base to draw upon.

4.7.2 Looking to the future, Perth will be faced with increased competition from Dundee in the leisure market, with development of the Waterfront and the arrival of the V&A.

4.7.3 Stirling too, is a strong shopping centre and a very prominent visitor destination with its Castle, Monument, general history, easy accessibility and pleasant setting. The main area of competition is likely to remain the visitor and day tripper market. Therefore Perth will need to continue to invest in the city centre in terms of its street, environment, retail and leisure offer in order to maintain its position against Stirling and Dundee. Promotion and management of the city centre will provide a key role towards achieving this.

4.8 Crieff market

4.8.1 Crieff town centre mostly contains local retailers, with limited multiple retailer representation at 7% (11/ 167 retail units). Among the key retailers are *Boots, Edinburgh Woollen Mill, RS McColl, Semi-Chem, Scottish Hydro Electric, Premier Stores and Co-operative Food.* It is a significant visitor destination.

4.8.2 Store openings in Crieff include a Nisa convenience store on Penny Lane (the former Haldanes). CeeGee's fashion store on East High Street burnt down in 2011 but has been rebuilt and re-opened in 2013. Closures in Crieff include *DE Shoes, Co-operative Travel, Nickel & Dime, Christian Bookshop and Meg's Kitchen*.

4.8.3 Retail rents in Crieff range from £6 to £14 per sq ft and commercial yields are between 8.5% to 9%.

4.8.4 There is one known retail requirement for Crieff (The Yorkshire Trading

Co.) for a unit of around 460 sq.m. The company is looking for shops in all towns across Scotland.

4.8.5 Since 2010 there were 29 retail deals in Crieff totalling 3,152 sq.m., equating to around 7 deals per annum. In addition there were two leisure related deals. The CoStar database shows that there are currently 10 available retail units being marketed in Crieff totalling 959 sq.m.

4.8.6 There are plans to convert the former Old South Church on Comrie Street / Coldwells Road into a 13-bedroom hotel with restaurant and spa. Crieff's role as a visitor/ leisure destination is also strongly bolstered by the Crieff Hydro and further reference is provided in the health check in section 6. Otherwise, the main leisure facilities are at the Strathearn Community Centre.

4.8.7 There is information on the business outlook of Crieff retailers and other businesses in section 5.

4.9 Kinross market

4.9.1 Kinross town centre mostly contains local retailers, with limited multiple retailer representation at 10% (6/ 58 retail units). Key multiple retailers include *Co-operative Food, Ferrier & MacKinnon Opticians, Rowlands Pharmacy, and Baynes the Bakers.* In addition Sainsbury's is located out of centre. Most of the town centre multiples are local rather than national retailers.

4.9.2 There have been a few closures in the town including *Blockbuster* and the *Acorn Pet Centre*. The Clydesdale Bank plans to close its Kinross branch following an announcement in March 2013.

4.9.3 Limited evidence on retail rents is available for Kinross but transactional evidence shows retail rents of mostly around £12 per sq ft. Commercial yields are between 9% to 9.5%.

4.9.4 Since 2010 there have been only three recorded retail transactions in Kinross totalling 78 sq.m. CoStar records only two retail units currently on the market in Kinross : 94 High Street (65 sq.m.) former Blockbuster; and the other encompasses the planned redevelopment of the motorway services at Junction 6 of the M90 which will include 8 shell retail units of c. 279 sq.m. each.

4.9.5 The leisure offer in the town centre is limited, but the Green Hotel is a venue for music/bands and the nearby Loch Leven Community Campus provides an excellent range of sports/ community facilities.

4.9.6 The next section provides an analysis of the interview surveys, including the findings of the business occupiers' survey for Kinross on their business outlook.

5 Interview surveys

5.1 Introduction

5.1.1 The Perth & Kinross Study includes two different interview surveys:

- Household telephone interview survey covering each of the five sub areas (sample total 1,252); and
- Town centre retailer/business survey in Perth, Crieff and Kinross (sample total 102)

5.1.2 This section summarises the findings of the surveys, which provide valuable data on shopping patterns, perceptions of the quality of shopping in the town centres and the views of local retailers/ businesses.

5.2 Household survey

5.2.1 A telephone interview survey of 1,252 households was undertaken in the Council area by NEMS Market in March 2014. It was divided into quotas by sub area-see Appendix 1). The survey sought to identify shopping patterns and also perceptions of the main town centres and the list of questions is provided in Appendix 2.

5.2.2 The output tables produced by NEMS Market Research, showing the questions and responses, are provided in a separate document to accompany this report.

5.3 Shopping patterns

5.3.1 Analysis of the survey findings, including graphs are provided in section 7 for convenience retailing and section 9 for comparison retailing.

5.4 Use and perceptions of the town centres- general

5.4.1 Questions on the use and perceptions of Perth city centre and the town centres of Crieff and Kinross (Q15-25) relate to respondents from the sub area in which these towns are located. For Crieff, this includes part of Strathearn (Zone 3a), which excludes Auchterarder. The survey in fact collected information on the use and perception of all the main town centres. While the study brief requires health checks of three specified town centres, the survey information on the other town centres is available for use by the Council for health checks in the future.

5.5 Frequency of visit to the town centres

5.5.1 Table 5.1 shows the reported frequency of visits to each of the three town centres. Weekly visits featured strongly in Perth city centre compared to the other town centres.

5.6 Mode of travel

5.6.1 The normal mode of travel to each of the town centres is shown in Table 5.1. It reveals the primacy of the car, but with more people using bus services to visit Perth city centre, compared to the other towns.

5.7 Dwell time in the town centres

5.7.1 In Perth and Crieff town centres, high proportions reported staying for between one and two hours. In Kinross, half the respondents stayed for up to half an hour only, as indicate in Table 5.1

5.8 Main reasons for visiting the town centre

5.8.1 The graphs overleaf indicate the most frequently stated reasons for visiting each of the three town centres. Shopping features much more frequently for Perth city centre compared to the smaller town centres, which reflects its sub regional status.

5.9 Likes and dislikes about the town centres

5.9.1 The respondents were asked to identify what they most liked and disliked about the town centres. The most frequent responses are shown on the graphs overleaf. For Perth, the main likes were ‘close to home’ and the choice and range of shops. In Crieff, the likes included the range of shops, shopping generally and the cafes/ restaurants. In Kinross, the main like was ‘close to home’, with limited other commendations.

Table 5.1
Frequency of visit, mode of travel and dwell time in the town centres, including frequency of visits in the evenings

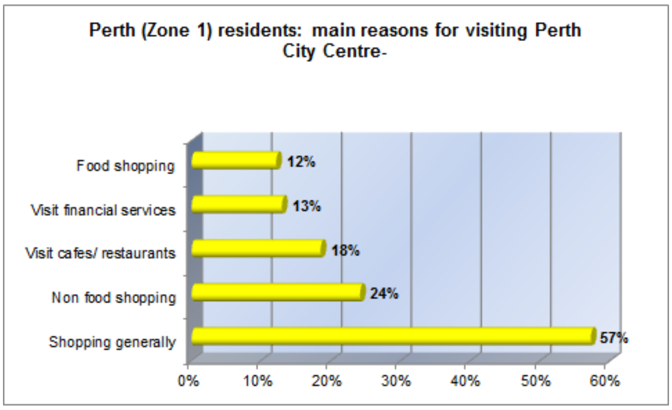
Frequency of visit	Perth City Centre	Crieff Town Centre	Kinross Town Centre
Daily	12%	8%	9%
Every 2 days	2%	4%	3%
Between 3 times and 6 times a week	15%	11%	14%
Weekly	24%	11%	15%
2-3 times a month	17%	11%	4%
Once a month	12%	10%	12%
Less frequently than once a month	12%	26%	14%
Never visit	5%	19%	30%
(Don't know / varies)	2%	1%	0%

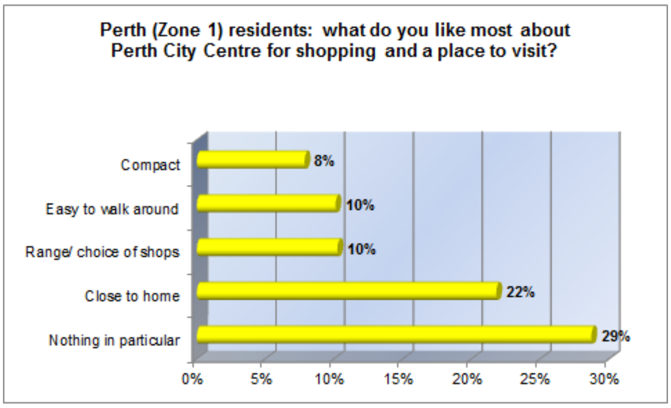
Normal mode of travel to the town centre	Perth City Centre	Crieff Town Centre	Kinross Town Centre
Drive self in car / van	57%	60%	63%
Passenger in car / van	5%	11%	1%
Walk	15%	20%	26%
Bus	22%	6%	7%
Taxi	0%	0%	0%
Cycle	0%	1%	2%
Motorcycle	0%	0%	0%
Rail	0%	0%	0%
Other	0%	0%	0%
Mobility scooter	0%	1%	0%
(Don't know)	0%	1%	2%

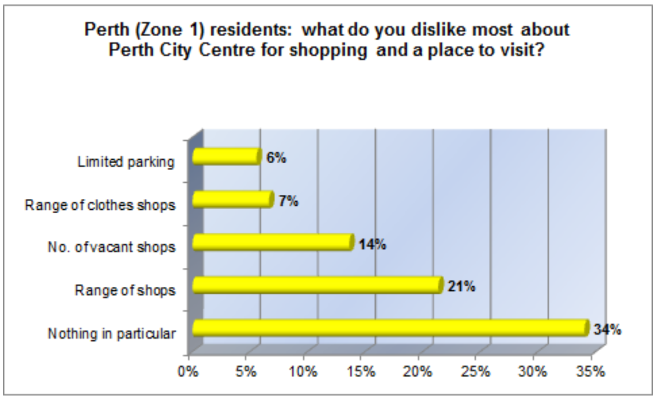
Dwell time in the town centre	Perth City Centre	Crieff Town Centre	Kinross Town Centre
Less than 30 minutes	2%	14%	50%
30 minutes - 59 minutes	12%	18%	17%
1 hour – 1 hour 59 mins	40%	44%	21%
2 hours – 2 hours 59 mins	30%	14%	4%
3 hours – 3 hours 59 mins	5%	2%	0%
4 hours or more	6%	2%	3%
(Don't know)	4%	7%	5%

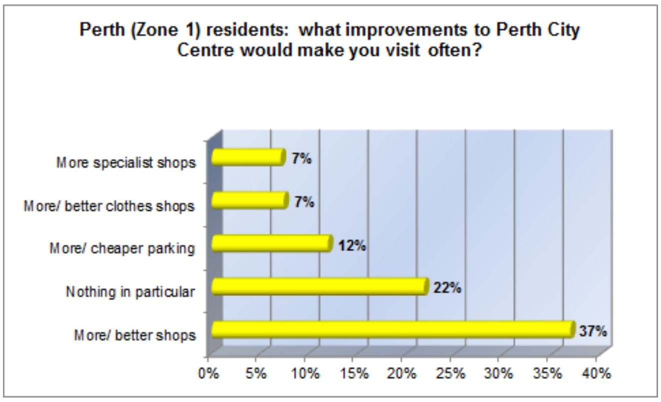
Frequency of visit to the town centre in the evenings after 6pm	Perth City Centre	Crieff Town Centre	Kinross Town Centre
Daily	0%	0%	1%
Every 2 days	0%	0%	1%
Between 3 times and 6 times a week	2%	0%	6%
Weekly	5%	1%	3%
2-3 times a month	9%	7%	3%
Once a month	8%	4%	6%
Less frequently than once a month	17%	15%	14%
Never	57%	72%	63%
(Don't know / varies)	1%	0%	4%

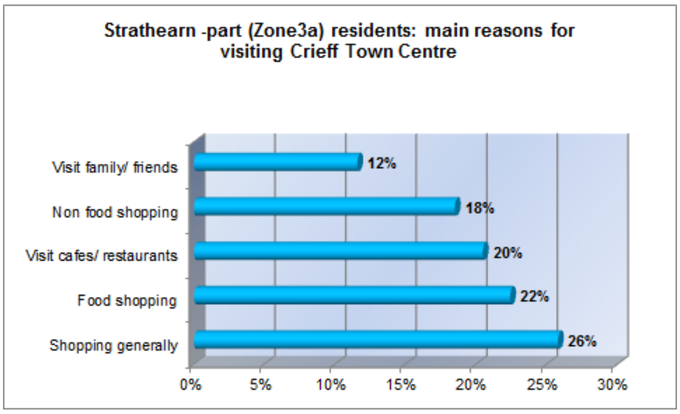
Use and perceptions of Perth, Crieff and Kinross town centres- household survey

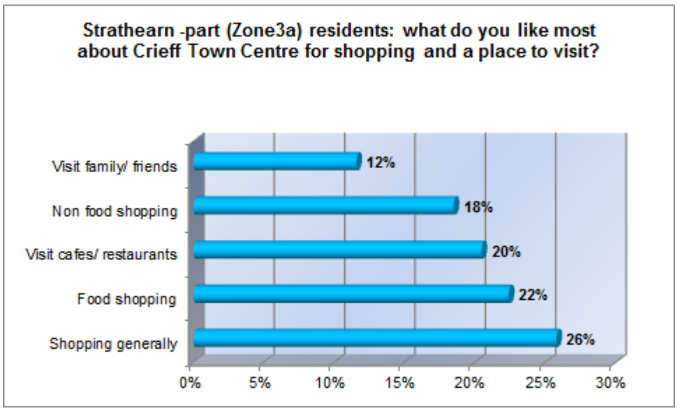




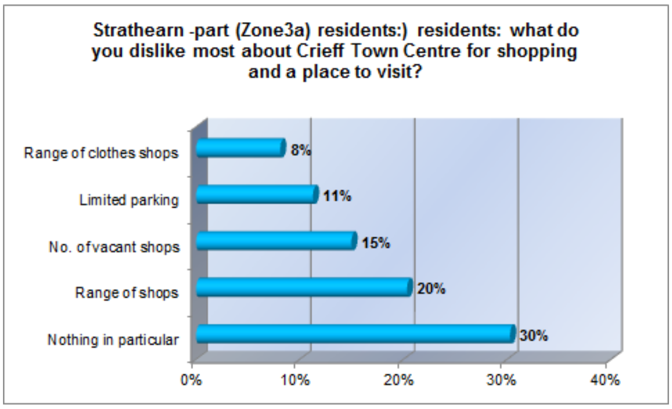


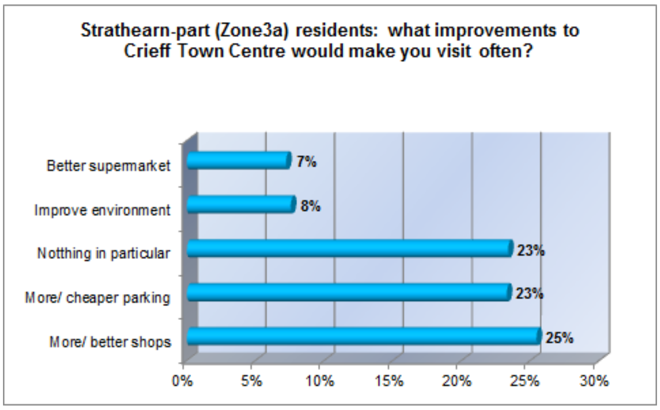


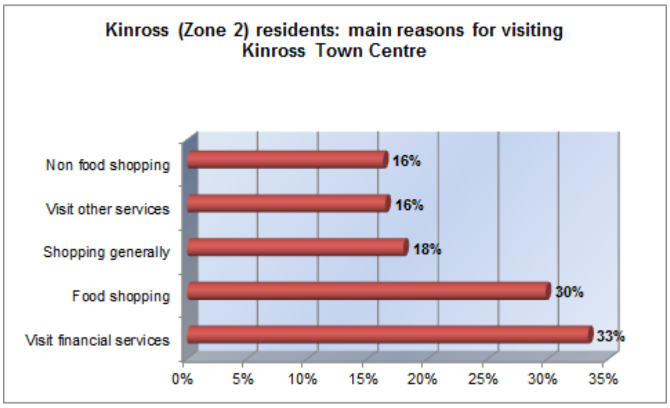


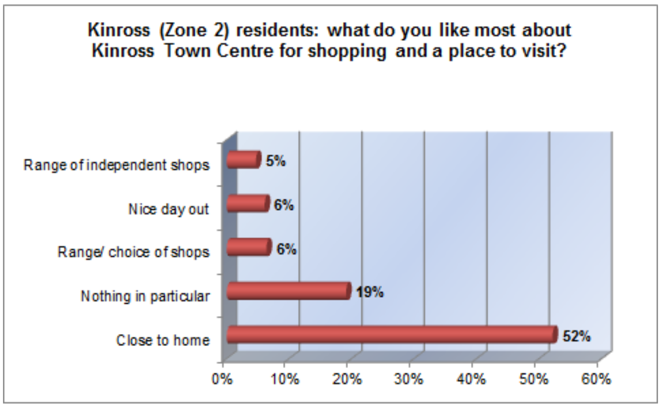


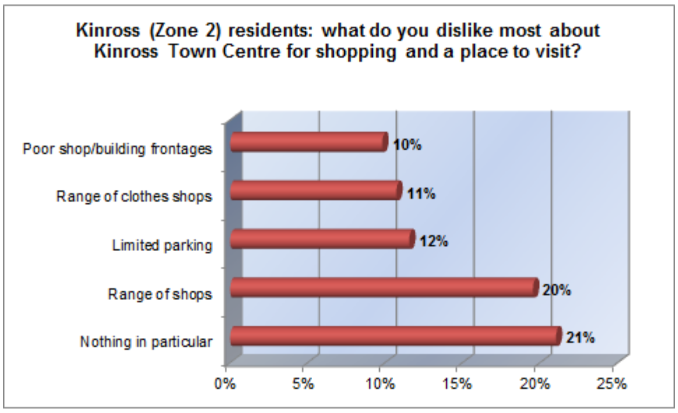
Use and perceptions of Perth, Crieff and Kinross town centres- household survey

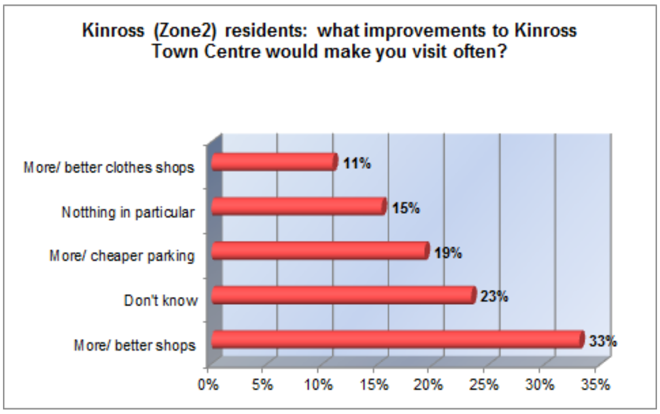












5.9.2 For Perth city centre, the main dislikes were the range of shops (21%) and the number of vacant shops (14%), as was the case for responses on Crieff town centre- 20% and 15% respectively. In Kinross, it was the range of shops (20%) and limited parking (12%). Given that these were the most frequent complaints, the proportions are quite moderate.

5.10 Improvements that would encourage more visits

5.10.1 The respondents were asked to identify improvements that would make them visit the town centre in their catchment more often. The most frequently mentioned responses are shown in the graphs in the preceding pages. For Perth city centre, the main improvements would be more and better shops and better parking (but much less significant). For Crieff town centre, it was also more and better shops and better parking, but at more even frequencies. For Kinross town centre, more and better shops and better parking were also the most frequently quoted improvements needed.

5.11 Rating the town centre qualities- household survey

5.11.1 The respondents were asked to rate selected qualities of the town centre in their catchment. The assessments are shown in Table 5.2.

5.11.2 Respondents from Perth rated the range and choice of shopping in the city centre as good/ average, but with most saying 'average'. The quality of shops was also rated quite well, but parking attracted more criticism. The city centre environment was rated quite strongly and it was strongly considered to be a pleasant place to visit.

5.11.3 Respondents from the Crieff catchment gave a similar rating to Perth for the range, choice and quality of shops in Crieff town centre. Parking was considered poor/ average. The town centre environment was rated average/ good and the centre was strongly considered to be a pleasant place to visit.

5.11.4 Respondents from the Kinross gave an average/ poor rating for the range and choice of shops, but an average/ good rating for the quality of shops. Parking was considered poor/ average. The town centre environment was rated mostly average/ poor, but rated quite well as a pleasant place to visit.

5.12 Frequency of visit in the evenings

5.12.1 The catchment respondents were asked how frequently they visited their town centre in the evenings and the findings are shown in Table 5.1. High proportions never visited the city centre, or Crieff and Kinross town centres in the evenings. Otherwise, it was mainly less frequently than once a month.

5.13 Leisure-related activities in the town centres in the evenings

5.13.1 Table 5.3 shows the most frequently mentioned leisure-related activities undertaken in the each of the town centres by respondents from the relevant catchment areas. The wide list of activities identified in Perth city centre indicates its much greater scale and range of offer, compared to the small town centres of Crieff and Kinross.

5.14 Retailer/business survey

5.14.1 A survey of retailers and other businesses in Perth, Crieff and Kinross town centres was undertaken by NEMS Market Research in April 2014. Self-completion questionnaires were distributed by hand to 300 occupiers in total, which were collected about a week later, with some returned by post. In addition, follow up telephone calls were made to boost completion.

5.14.2 The achieved completion rate was 34%, with 103 completed returns (Perth 59, Crieff 28 and Kinross 16). The output tables produced by NEMS Market Research, showing the questions and responses, are provided a separate document to accompany this report. Individual businesses are not disclosed, to respect confidentiality. A list of the questions asked is provided in Appendix 3.

Table 5.2
Household survey- how the catchment respondents rated their town centre

	Perth	Crieff	Kinross
Range and choice of shops			
Good	28%	26%	6%
Average	45%	42%	45%
Poor	26%	29%	44%
Don't know	1%	2%	4%
Quality of shops			
Good	43%	41%	35%
Average	44%	46%	52%
Poor	11%	10%	10%
Don't know	2%	2%	4%
Parking			
Good	31%	17%	13%
Average	27%	34%	30%
Poor	28%	42%	46%
Don't know	14%	7%	11%
Town Centre environment			
Good	52%	31%	26%
Average	33%	49%	36%
Poor	13%	20%	36%
Don't know	1%	1%	2%
As a pleasant place to visit			
Good	66%	59%	54%
Average	25%	31%	24%
Poor	8%	9%	19%
Don't know	1%	1%	2%

Table 5.3
Most requently mentioned leisure-related activities when visiting the town centre in the evenings- by catchment respondents

	Perth	Crieff	Kinross
Visit restaurants or cafes	73%	81%	50%
Buy take-aways	17%	15%	58%
Visit pubs / wine bars	43%	8%	19%
Use sports halls or gyms	10%	6%	24%
Swimming	13%	5%	10%
Community hall activities / meetings	8%	5%	22%
Theatre	33%	0%	0%
Cinema	41%	0%	0%
Concert hall	36%	0%	0%
Late shopping (when open)	14%	6%	8%

5.15 Types of businesses

5.15.1 The graphs overleaf show the types of business who responded in each of the three town centres. In Perth, there was a high proportion of comparison retailers, whereas in Crieff, a high proportion of service businesses responded. In Kinross, comparison retailers and service businesses comprised the majority of responses.

5.16 Multiples/ independents

5.16.1 Independent operators were the main group of respondents –Perth 71%, Crieff 82% and Kinross 94%.

5.17 Length of trading in the town centres

5.17.1 Most respondents reported that they had been trading locally for more than ten years, as indicated on the graphs overleaf.

5.18 Business outlook

5.18.1 The respondents were asked what they felt about their future sales performance over the next two years. Some 29% of those from Perth anticipated lower sales, with 19% saying no change and 34% expecting increasing sales. For those from Crieff, the corresponding proportions were 18% lower sales, 39% no change and 32% increasing sales. For Kinross, the proportions were 19% lower sales, 19% no change and 56% increasing sales. Small proportions in each case could not say. Generally, the picture is more optimistic than pessimistic.

5.18.2 Main reasons given for lower sales and higher sales are indicated on the graphs overleaf. Respondents from all three towns stated that they were actively considering improving their range of goods, pricing and improvements to their premises as ways of advancing their businesses.

5.19 Importance of tourist spending

5.19.1 The respondents were asked to assess the importance of tourism to their businesses and mostly it was rated as quite important, but very important in Crieff, as indicated on the graphs overleaf. The questionnaire also gathered information on the respondents' estimates of the proportion of their turnover attributable to tourist spending. This detail can be viewed in the survey tabulations. Note that the respondents have contradictory views on the contribution of tourism to their sales, as evident in the middle row of graphs in the following pages.

5.20 Rating the town centre qualities- business survey

5.20.1 The respondents were asked to rate the qualities and characteristics of their town centre over a range of specified issues. These are shown in Table 5.4, together with the responses.

5.20.2 From the Perth respondents, the range and quality of shops was mostly considered average. The Crieff and Kinross respondents mostly considered the range of shops as poor, but the quality as average.

5.20.3 Perth came out well in terms of the range and quality of places to eat, with Crieff as fair and Kinross as rather poor.

5.20.4 The level of parking in Perth was rated as average by 34% of the respondents and poor by 39% of the respondents. In Crieff 50% rated it as average and 39% rated it as poor. In Kinross, 19% of the respondents rated the level of parking as average and 69% rated it as poor.

5.20.5 The location of parking in Perth was rated as average by 39% of the respondents and poor by 29% of the respondents. In Crieff 46% rated it as average and 46% rated it as poor. In Kinross, 25% of the respondents rated the location of parking as average and 56% rated it as poor.

5.20.6 Parking costs were mainly considered unpopular in Perth and Crieff.

5.20.7 Pedestrian friendly access was rated strongly in Perth, but around average/ poor in Crieff and Kinross. Bus services were rated generally good in Perth, but more average in Crieff and Kinross.

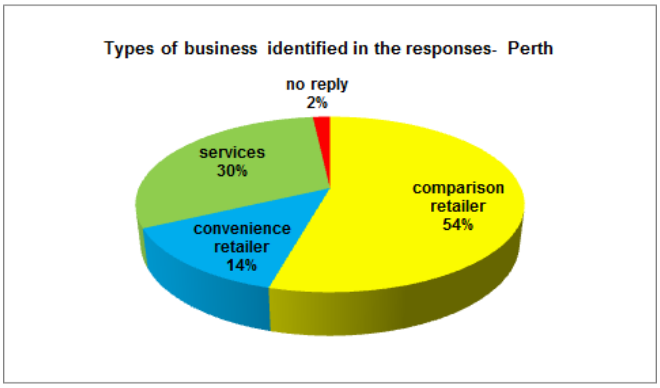
5.20.8 The town centre environment was rated average in Perth by 41% of the respondents, but with significant proportions rating it as good (27%), and poor (32%). Rating of the town centre environment of Crieff was lower at 32% saying average and 46% saying poor. The rating in Kinross was much lower with 38% saying average and 63% saying poor.

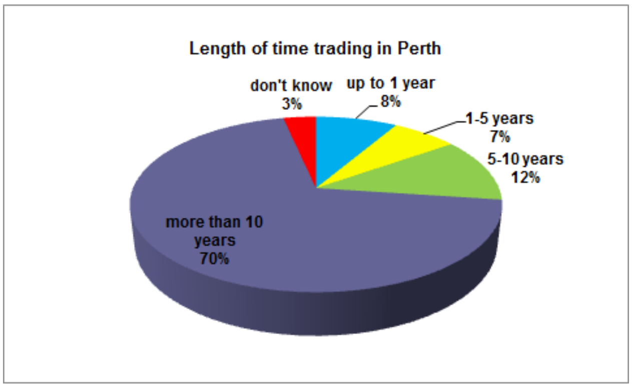
5.20.9 As a pleasant place to visit, Perth city centre came out best, followed by Crieff. Kinross was less well rated, with half of the respondents describing it as average.

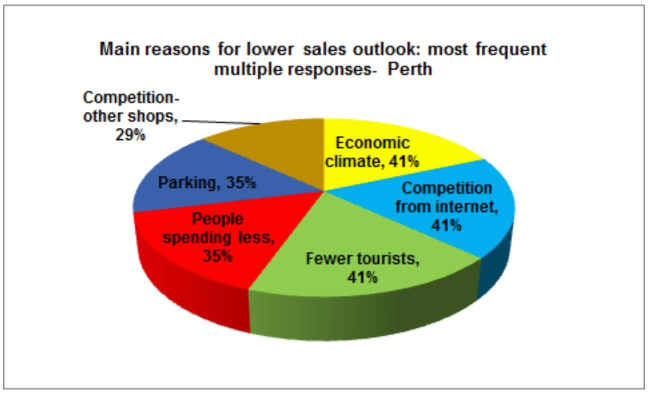
5.21 Priorities for improvement in the town centres

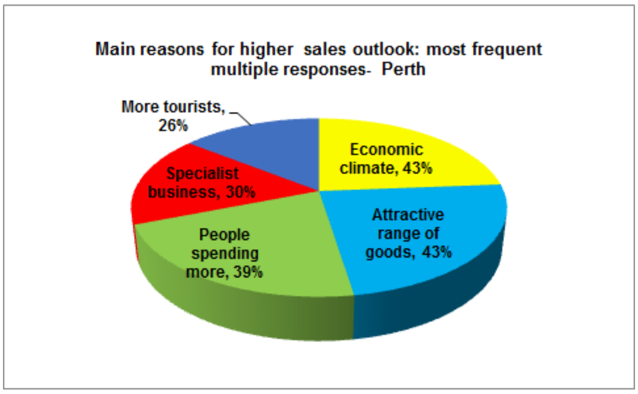
5.21.1 The respondents were asked to identify the level of importance they would allocate to a specified list of issues for potential improvement in the town centres. This detailed list is set out in Table 5.5 and it is largely self-explanatory. The need for improved shopping and parking emerge strongly, along with maintaining clean streets, and improved tourist information/ marketing.

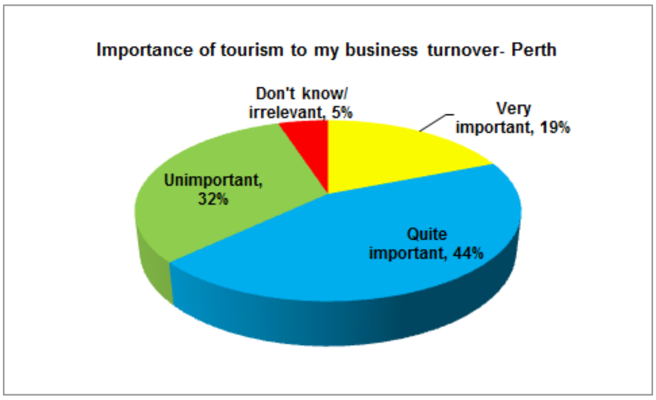
Perth City Centre retailer/ business survey



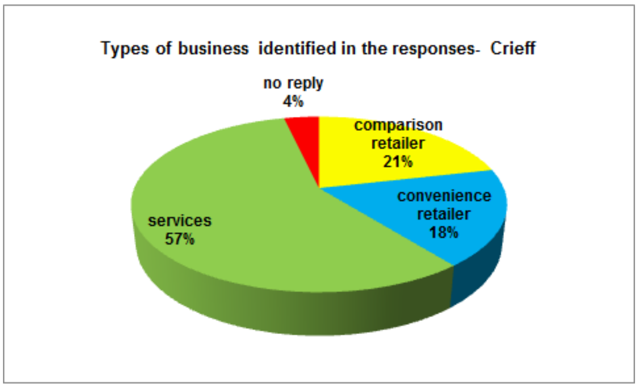


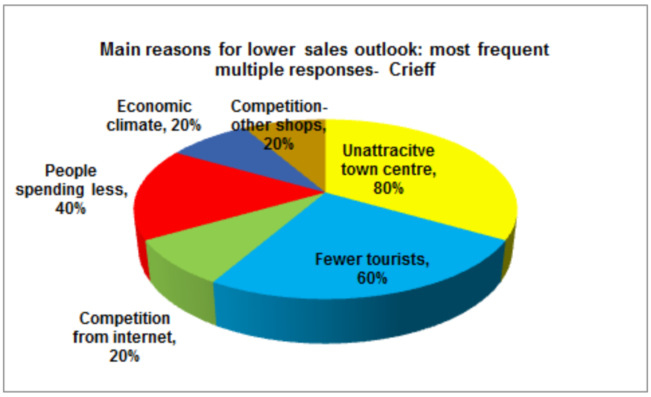


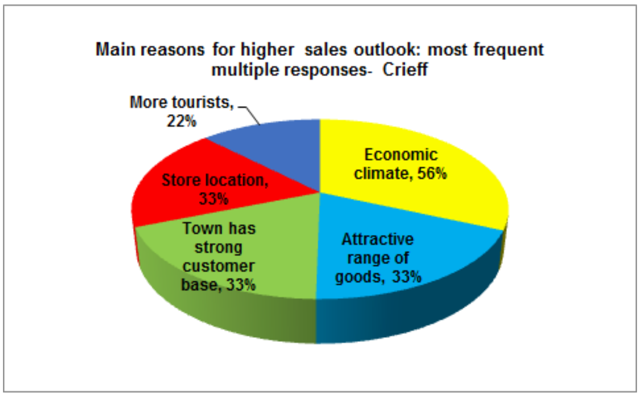


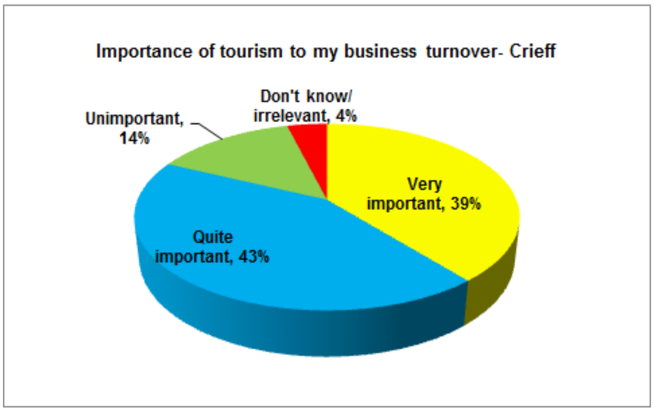


Crieff Town Centre retailer/ business survey

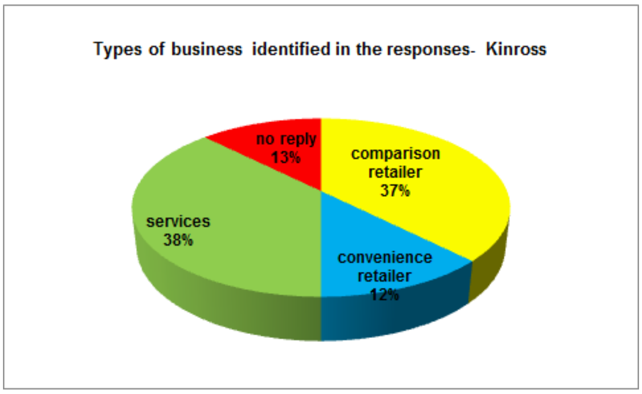


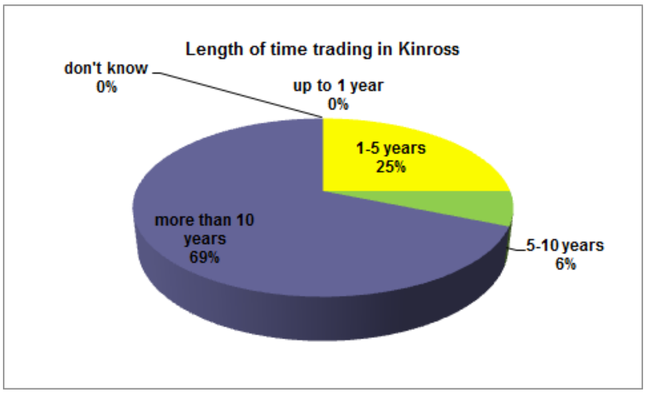


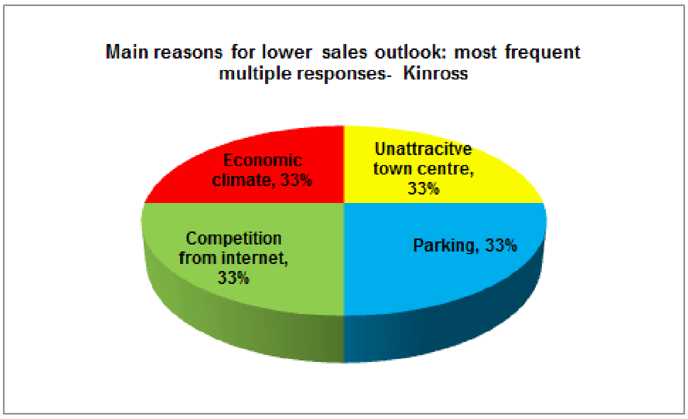


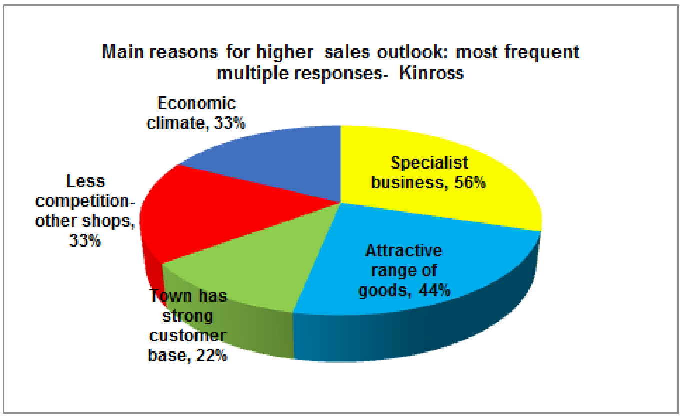


Kinross Town Centre retailer/ business survey









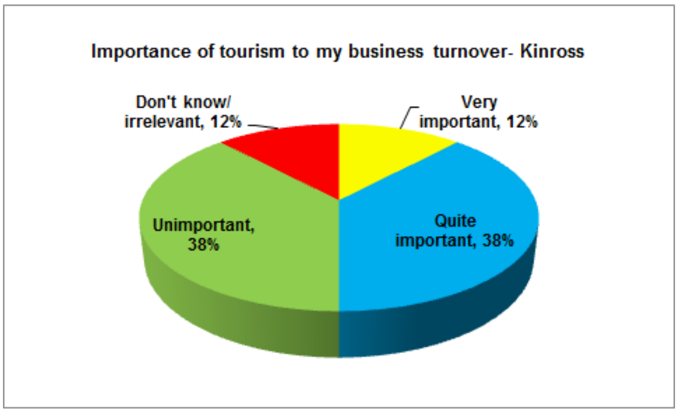


Table 5.4
Business occupiers survey- how they rated the town centre in which they are located

	Perth	Crieff	Kinross
Range and choice of shops			
Good	17%	11%	0%
Average	46%	21%	13%
Poor	37%	68%	88%
Don't know	0%	0%	0%
Quality of shops			
Good	20%	21%	19%
Average	61%	54%	63%
Poor	19%	25%	19%
Don't know	0%	0%	0%
Range and choice of eating places			
Good	69%	39%	31%
Average	19%	50%	25%
Poor	12%	7%	44%
Don't know	0%	4%	0%
Amount of parking			
Good	24%	11%	13%
Average	34%	50%	19%
Poor	39%	39%	69%
Don't know	3%	0%	0%
Location of parking			
Good	27%	7%	19%
Average	39%	46%	25%
Poor	29%	46%	56%
Don't know	5%	0%	0%
Cost of parking			
Good	10%	0%	75%
Average	12%	36%	13%
Poor	69%	54%	0%
Don't know	8%	11%	13%
Pedestrian- friendly access			
Good	37%	18%	13%
Average	46%	50%	50%
Poor	12%	32%	31%
Don't know	5%	0%	6%
Bus services			
Good	54%	32%	13%
Average	27%	36%	50%
Poor	3%	21%	6%
Don't know	15%	11%	31%
Town Centre environment			
Good	27%	18%	0%
Average	41%	32%	38%
Poor	32%	46%	63%
Don't know	0%	4%	0%
As a pleasant place to visit			
Good	42%	36%	19%
Average	39%	36%	50%
Poor	19%	29%	31%
Don't know	0%	0%	0%

Table 5.5
Business occupiers survey- improvements they would like in the town centre in which they are located, with the level of importance indicated

	Perth	Crieff	Kinross
Better amount of parking / pull-in areas			
Essential	53%	64%	75%
Quite important	39%	36%	19%
Not important	8%	0%	0%
(Not answered)	0%	0%	6%
Better located parking			
Essential	37%	57%	56%
Quite important	49%	36%	19%
Not important	14%	7%	13%
(Not answered)	0%	0%	13%
Cheaper parking			
Essential	73%	57%	13%
Quite important	19%	29%	19%
Not important	8%	7%	31%
(Not answered)	0%	7%	38%
Closer bus stop/ better services			
Essential	8%	29%	25%
Quite important	37%	29%	31%
Not important	51%	39%	19%
(Not answered)	3%	4%	25%
Improved access by foot			
Essential	10%	29%	31%
Quite important	39%	32%	25%
Not important	47%	32%	19%
(Not answered)	3%	7%	25%
Easier road crossings			
Essential	14%	21%	31%
Quite important	37%	54%	31%
Not important	46%	21%	13%
(Not answered)	3%	4%	25%
More separation from traffic/ more pedestrian areas			
Essential	10%	36%	25%
Quite important	19%	14%	31%
Not important	69%	46%	19%
(Not answered)	2%	4%	25%
Improvements to town centre streetscape and building frontages			
Essential	51%	64%	63%
Quite important	25%	18%	25%
Not important	17%	18%	0%
(Not answered)	5%	0%	13%
Introduction of more high quality shops			
Essential	68%	54%	75%
Quite important	25%	29%	25%
Not important	3%	11%	0%
(Not answered)	3%	7%	0%
Cleaner pavements/ less litter			
Essential	53%	61%	50%
Quite important	27%	25%	25%
Not important	19%	14%	13%
(Not answered)	2%	0%	13%
More cafes and restaurants			
Essential	17%	4%	19%
Quite important	20%	36%	25%
Not important	61%	57%	44%
(Not answered)	2%	4%	13%
More leisure facilities generally, especially for visitors			
Essential	42%	32%	25%
Quite important	34%	43%	44%
Not important	24%	21%	13%
(Not answered)	0%	4%	19%
Longer / later opening hours			
Essential	25%	18%	13%
Quite important	37%	39%	38%
Not important	34%	39%	38%
(Not answered)	3%	4%	13%
Better road signage			
Essential	24%	21%	13%
Quite important	34%	54%	38%
Not important	41%	21%	31%
(Not answered)	2%	4%	19%
Better tourist information/ marketing			
Essential	49%	46%	50%
Quite important	31%	39%	31%
Not important	19%	11%	13%
(Not answered)	2%	4%	6%
Improved security			
Essential	39%	36%	0%
Quite important	36%	32%	63%
Not important	19%	29%	25%
(Not answered)	7%	4%	13%
Reduced loitering/ vandalism			
Essential	71%	57%	25%
Quite important	22%	29%	44%
Not important	5%	11%	13%
(Not answered)	2%	4%	19%
More events			
Essential	54%	43%	25%
Quite important	27%	46%	50%
Not important	14%	7%	6%
(Not answered)	5%	4%	19%
Improved tourist accommodation- B&Bs, hotels etc			
Essential	32%	43%	13%
Quite important	39%	29%	44%
Not important	25%	25%	19%
(Not answered)	3%	4%	25%
Provision of improved Wi-Fi access (hot spots) in the town centre			
Essential	53%	43%	31%
Quite important	25%	46%	19%
Not important	19%	7%	31%
(Not answered)	3%	4%	19%

6 Town centre health checks

6.1 Introduction

6.1.1 This section contains health check assessments of Perth city centre and the town centres of Crieff and Kinross, as required by the study brief. It also draws on the survey information provided in previous sections. There is a short explanation of the key performance indicators, followed by the health checks for Perth, Crieff and Kinross town centres as distinct sub sections.

6.2 Key indicators

6.2.1 The selected key performance indicators are based on those in the SPP, including those from the draft SPP and National Review of Town Centres. These include:

- Pedestrian flow counts
- Diversity of uses
- Quality of built environment
- Recent/ proposed investment
- Accessibility
- Attitudes and perceptions
- Retailer representation and market demand
- Retail rents and commercial yields
- Vacancy rates
- Leisure and cultural facilities, including the evening economy
- Events
- Crime and Safety
- Sense of place

6.2.2 The approach follows that applied in the *Strategic Review of Town Centres and Retailing in the TAYplan November 2013*, fortified by all the detail from the recent surveys and other information for this study.

6.2.3 **Pedestrian footfall-** is a basic indicator of the vitality of town centres. Pedestrian counts were undertaken in all three town centres by PMRS for this study. The reports were provided as separate documents to the Council, including maps showing the survey points.

6.2.4 **Diversity of uses**- information on the mix of land uses in the town centres is provided in section 4. Simple summary descriptions are provided in the health checks, based on the following range: *wide variety, medium variety and limited variety.*

6.2.5 **Quality of the built environment**- This indicator is applied in the form of a brief written description for each town centre, based on key physical features and perceptions from the interview surveys.

6.2.6 **Recent and proposed investment-** contains a brief description of significant development projects and regeneration initiatives.

6.2.7 **Accessibility-** would indicate the ease with which the public can visit the three town centres and the key issues. It includes evidence on the levels of accessibility for each town centre to include car parking, bus services and rail services, together with public perceptions from the interview surveys.

6.2.8 **Attitudes and perceptions-** on the town centres is drawn from the interview survey findings in section 5. This provides valuable information on what the public see as key issues for the town centres.

6.2.9 **Retailer representation and demand-** is an indicator of the strength of the retail offer and demand in the three town centres. The information is drawn from section 4. Multiple retailer representation is expressed as: *nos. of multiple retailers/ (nos. of convenience + comparison retailers*) in this study.

6.2.10 **Retail rents and commercial yields-** are measures of the market demand and the overall value of town centre premises as investments.

6.2.11 **Vacancy rates-** are also an indicator of the market demand for town centre properties and a visible indicator of performance. Information is provided in section 4 for each of the three town centres. For the health checks, vacancy rates are expressed as: *vacant units/ (retail units+non-retail units and vacant units)*. The unit based approach allows comparison with national data.

6.2.12 **Cultural and social events-** are indicators which contribute towards the sense of identity associated with town centres, including community involvement. The main events associated with each town centre are listed.

6.2.13 **Leisure and cultural facilities, including the evening economy-** contribute to the range of land uses and vitality of the town centres. The main facilities are summarised, together with information on use and perceptions from the interview surveys.

6.2.14 **Crime and safety-** mainly draws on the findings of the household survey on peoples' perceptions on general street safety. The aim is to identify issues where town centre management may be able to encourage improvements.

6.2.15 **Sense of place-** is a subjectively expressed combination of the results of applying the other indicators, with an emphasis on the quality of environment, diversity of offer and social, historical and cultural associations. It is intended to distil the defining characteristics of any town centre into a few words or images.

6.2.16 **SWOT analysis**- is provided in a table at the end, for each of the three town centres. The aim is to highlight the main strengths, weaknesses, opportunities and threats.

6.3 Perth City Centre Healthcheck

6.3.1 **Pedestrian flow counts-** were undertaken by PMRS Ltd (Pedestrian Market Research Services) in Perth city centre. Counts were made over two days (Friday and Saturday) and the figures grossed up to provide weekly counts (a standard method). In Perth, 30 count points were included ($4^{th}/5^{th}$ April) and the busiest points were at 174 High St (by Gap Clothing) at 33,880 per week and at 111 High Street (by New Look) at 27,740 per week. The lowest counts were in George Street and in Fleshers Vennel. More detail is provided in the separate report by PMRS, which has been provided to the Council, including a map showing the survey points. They represent baseline information for future monitoring, as they were specially commissioned for this study, so there is no trend information, although City Centre Management report downward trend from other surveys on High Street and St John's Street.

NO	OCCUPIER	ADDRESS	NOTE	FRIDAY COUNT	FRIDAY INDEX	SATURDAY COUNT	SATURDAY INDEX	WEEK COUNT	WEEK INDEX
1	WHITE STUFF L/WR	3 St John Street	T	1.62	61	2.52	74	9.74	68
2	WHISPERS OF THE PAST GIFTS	15 George Street		0.69	26	0.96	28	3.88	27
3	ELIZABETH PARKER JEWELLERY	20 George Street		0.39	15	0.58	17	2.27	16
4	MARKS & SPENCER	75-85 High Street	T	5.64	212	5.58	165	26.40	186
5	NEW LOOK L/WR	111-119 High Street	T	5.79	217	6.00	177	27.74	195
6	MONSOON L/WR	17-18 St Johns Centre	T	3.69	138	5.49	162	21.60	152
7	GAP CLOTHING	174 High Street	T	6.96	261	7.44	220	33.88	238
8	THE BOTHY BAR PH	30-33 Kinnoull Street		4.23	159	4.56	135	20.68	145
9	SAINSBURYS	199-205 High Street		3.06	115	4.02	119	16.66	117
10	NATIONWIDE BUILDING SOCIETY	204-206 High Street		3.36	126	3.93	116	17.15	121
11	SIMPLY BROW BEAUTY SALON	9 North Methven Street		2.07	78	2.88	85	11.65	82
12	GEORGE MCCONELL CTN	15 North Methven Street		1.74	65	2.79	82	10.66	75
13	THE MANNA HOUSE BAR PH	240-244 High Street	T	3.51	132	3.78	112	17.15	121
14	PREMIER BINGO	53 South Methven Street		0.96	36	1.47	43	5.72	40
15	DELICIOUS CAFÉ	46 South Methven Street		1.17	44	1.74	51	6.85	48
16	MAI PING THAI REST	161-165 South Street		2.01	75	2.31	68	10.16	71
17	BENSONS FOR BEDS FURN	188 South Street		1.65	62	2.04	60	8.68	61
18	EVA LUCIA L/WR	29 Scott Street		1.53	57	2.76	82	10.09	71
19	JADE GARDEN CHINESE REST	14 Scott Street		2.22	83	3.24	96	12.85	90
20	ROBERTSONS L/WR	22 Scott Street	T	2.52	95	3.12	92	13.27	93
21	ROYAL BANK OF SCOTLAND	131 South Street		3.54	133	4.68	138	19.34	136
22	TESCO METRO	122-134 South Street		3.39	127	4.47	132	18.49	130
23	DUNFERMLINE BUILDING SOCIETY	95 South Street	T	4.56	171	5.01	148	22.52	158
24	CAFÉ ROCCO	41 St Johns Centre	T	4.02	151	4.83	143	20.82	146
25	WATERSTONES BOOKS	28-31 St Johns Square	T	5.10	191	5.31	157	24.49	172
26	ANGUS GORDON HAIR	8 St Johns Place	T	0.84	32	2.70	80	8.33	59
27	VACANT	South St Johns Place	T	0.81	30	2.61	77	8.05	57
28	THE GRILL BAR PH	1-3 Fleshers Vennel	T	0.36	14	0.54	16	2.12	15
29	EXEL DINING	47 South Street		1.11	42	1.68	50	6.56	46
30	BANKS CAMP/SPTS GOODS	29 St John Street	T	1.41	53	2.46	73	9.11	64
	AVERAGE			2.67	100	3.38	100	14.23	100

Note: count data in the above table is in thousands (requires to be multiplied by 1,000).

6.3.2 **Distribution of floorspace-** is shown in detail in section 4 for Perth city centre in Tables 4.1 and 4.2, together with the accompanying graphs. The high proportion of floorspace devoted to comparison floorspace reflects the role of Perth as the sub regional shopping centre for the Council area (Tier 1 centre in the LDP). The proportion relating to convenience floorspace is very limited, as most provision is out of centre. Other occupied floorspace accounts for about half the floorspace in the city centre. Much of this is accounted-for by restaurants, cafes, leisure related and community uses and Council/ public services uses. This is assisted by promotion of the Café Quarter and the Cultural Quarter. Overall, Perth city centre has a wide variety of uses which is a positive attribute.

6.3.3 **Quality of the built environment-** in general, the quality of environment is high in the city centre, with its Conservation Area and large numbers of listed buildings. A large number of buildings require repairs and substantial investment (see *Perth Conservation Area Appraisal 2008*). The city centre environment was rated quite highly in the household survey (Table 5.2), but mostly average in the survey of businesses (Table 5.4). Many felt that improvements to the building frontages and street environment were essential (Table 5.5). This may be interpreted as recognising the underlying high quality. The findings of the business survey supported street cleaning as an essential improvement, and consultations with City Centre Management concur with. Cleaning and painting of the venels in the city centre is also supported by the CC Management.

6.3.4 **Recent and proposed investment-** there has been fairly recent upgrading of the pedestrianised central area. Investment in St John's Shopping Centre has been completed with River Island and H&M open and also the arrival of Crabtree & Evelyn. The centre appears to be trading well. It is proposed to invest £1.2 million in Mill Street to improve pedestrian linkages by 2015- see *Invest in Perth* and the associated *City Plan 2013-23*. Continuing investment is needed though, to compete with centres outside the Council area, including Dundee, Stirling and others.

6.3.5 **Accessibility-** Perth is a transport nodal point within the Scottish road and rail network, which provides good accessibility to the city centre from the Central Belt and the North/ North East of Scotland. Linkages with Dundee are very strong. Within Perth, road access to the city centre is fairly direct, with the main roads radiating out from the centre. The city centre itself has pedestrianised street sections. Pedestrian friendly access came out quite strongly in the business survey (section 5). There is a mix of off-street and on-street parking, with 28 car parks providing 2,775 spaces plus 1,179 on-street spaces (Council data). Perth is served by 17 bus services *(14,15A, 16A, 16B, 17, 23, 27,34A, 34B, 35A, 36A, 53B, 56A, 56B, 57, 333 and 823).* Bus services were rated well in the business survey (Table 5.4). Train services are provided by Scotrail.

6.3.6 In the household survey, similar proportions rated parking in the city centre as good/ average/ poor. Similar views emerged from the business survey, but with more in the 'poor rating', including criticism of the cost of parking (section 5). Overall, accessibility could be described as fairly good generally.

6.3.7 **Attitudes and perceptions of the city centre**- were recorded by the household and business surveys and summarised in section 5. The household survey indicated strongly that the main reason for visiting the city centre by far, was for shopping. Other significant reasons included visiting restaurants, cafes, financial institutions etc. The survey also revealed that substantial proportions of people do not have hold strong opinions on the city centre (i.e no particular likes/ dislikes). More/ better shops emerged as the main reason that people mentioned would attract them to visit the centre more often. The household survey indicated that most respondents considered that the city centre was a pleasant place to visit (Table 5.2), and a similar view emerged from the business survey (Table 5.4). Also in the business survey, more events, more marketing and improved provision for visitors featured as essential improvements (Table 5.5). Overall, attitudes were reasonably favourable but there is room for improvement over a range of issues, including fundamentally, the retail offer.

6.3.8 **Retailer representation and demand-** multiple retailer representation is 30% (82/269) in the city centre (excluding charity shops), which is a good level for a traditional historic city centre of this scale. The proportion is based on the Goad 2013 survey. However, the strength of Perth is its range of quality of independent retailers, including specialists. This feature distinguished it from Dundee, which has a much higher proportion of multiples (70%). In this way, the two cities are able to complement each other to some extent. Continuing demand by retailers is evident, with recent take up of units, but no requirements for large scale additions to date. The survey findings in section 5 indicate pressures from competition, including internet shopping. Maintaining and improving the city centre environment will be essential to support the shopping, especially 'destination' shopping trips from beyond the Council area.

6.3.9 **Retail rents and yields-** current Zone A retail rents are around £65 per sq ft in the city centre, which compares with around £100 per sq ft in Dundee and £110 per sq ft in Stirling. Commercial yields are estimated to be around 7% to 7.5%.

6.3.10 **Vacancy rates-** the vacancy rate (units) in the city centre is 11.1%, compared to the average for town centres in Scotland of 14.5%- see section 4. This also compares with over 16% for Dundee. Thus, the vacancy rates in the city centre are lower than average.

6.3.11 **Cultural and social events-** Perth has a range of events and a programme for the city centre is being developed. These include arts festivals, kilt run, winter festival and sporting events. There is a farmers' market, a continental market and craft markets in the city centre. Perth also has an agricultural show and highland games.

6.3.12 **Leisure and cultural facilities, including the evening economy-** as shown in section 4, Perth has a good variety of facilities and venues. The principal facilities include the Concert Hall, museums, galleries, leisure pool, ice rink, cinema (new IMAX to open shortly), halls, dining out, cafes, betting/ amusements and city centre walks. The Horsecross Theatre is closed for refurbishment and scheduled to re-open in 2017.

6.3.13 Results of the household survey (Table 5.1), show that the frequency of visits to the city centre in the evenings was limited (5% weekly, 17% between one and three times a month), 17% less frequently than once a month, with 57% stating that they never visit in the evenings). These figures suggest potential scope for increased attraction. Indeed, the business survey findings indicated that more leisure facilities generally were essential/ quite important. Table 5.3 reveals a wide range of leisure related activities undertaken in the city centre in the evenings, including dining, drinks, theatre, cinema, concerts and sports. Perth did well in the household survey for places to eat (Table 5.4).

6.3.14 **Crime and safety-** security issues did not feature much in the household survey findings, with less than 4% mentioning the issue as a 'dislike' of the city centre. In the business survey findings (Table 5.5), there was a higher level of concern, with many stating that improved security is essential and also reduced loitering and vandalism.

6.3.15 **Sense of place-** Perth has a very strong identity and it is a significant visitor destination, as recognised in the STEAM/ VisitScotland data and in the findings of the business survey. The combination of historic buildings/ streets, historic role, attractive environment and mix of town centre uses is very positive.

6.3.16 **SWOT summary**

Strengths	**Weaknesses**
• Sub regional centre with a wide variety of town centre uses	• Difficulties in sustaining major property investment and redevelopments
• Extensive defined catchment area, plus a visitor destination	• Multiple retailer representation could be higher, with limited multiple requirements currently
• Good retail offer with a strong, distinctive independent sector	• Issues of mismatch between modern property requirements and historic centre properties
• Good range of non-retail services and leisure-related facilities, café quarter etc	• High costs of improvements and building maintenance in historic centre
• Fairly stable level of retail demand and supply	• Evidence that locals want improvement to the range and choice of shops generally
• Attractive setting, including historic street environment	
• Mostly good accessibility	
• Strong sense of place	
Opportunities	**Threats**
• Potential to increase the attraction to Perth as a destination	• Continuation of the economic climate, causing reduced spending/ town centre investment
• Potential to boost the evening economy	• Increasing competition from Dundee and Stirling for shopping and leisure
• Invest further on the strength of the independent retail sector	• Increasing internet spending
• Host more events/ promotions	• Any reduction in effort to improve the commercial offer and environmental quality
• Improve range/ choice of shops	

6.4 Crieff Town Centre Healthcheck

6.4.1 **Pedestrian flow counts-** were undertaken by PMRS Ltd (Pedestrian Market Research Services) in Crieff town centre Counts were made over two days (Friday and Saturday) and the figures grossed up to provide weekly counts (a standard method). In Crieff, 18 count points were included (11th/12th April) and the busiest points were at 19 High St (by Subway) at 8,010 per week and at 20 High Street (by Lloyds TSB) at 5,960 per week. The lowest counts were in King Street and at 32 St James Square. More detail is provided in the separate report by PMRS, which has been provided to the Council, including a map showing the survey points. They represent baseline information for future monitoring, as they were specially commissioned for this study, so there is no trend information.

NO	OCCUPIER	STREET & ADDRESS	NOTE	FRIDAY COUNT	FRIDAY INDEX	SATURDAY COUNT	SATURDAY INDEX	WEEK COUNT	WEEK INDEX
1	D GOURLAY BUTCHER	13 East High Street		0.39	59	0.41	52	1.87	55
2	VACANT	6 Church Street	T	0.44	66	0.47	60	2.12	63
3	POST OFFICE	45 High Street		0.92	140	1.41	181	5.47	162
4	SUBWAY S/W BAR	19-21 High Street		1.26	192	2.15	275	8.01	237
5	MEMORIAL	James Square	T	0.90	137	1.46	187	5.54	164
6	THE GOLF CO SPTS GDS	30-31 James Square	T	0.30	46	0.65	83	2.22	66
7	STRATHEARN MEMORIALS	10 King Street		0.54	82	0.42	54	2.26	67
8	SALON SHADES HAIR	62 King Street		0.32	48	0.27	35	1.38	41
9	VACANT	53 King Street		0.17	25	0.30	38	1.09	32
10	COUNCIL OFFICE	32 James Square	A	0.20	30	0.38	48	1.34	40
11	KRAGTEN FLOORING	36 James Square		0.41	62	0.90	115	3.07	91
12	JAS COMPUTERS & MOBILES	20 West High Street		1.04	158	0.84	108	4.41	131
13	CARNELIAN CRAFTS GIFTS	11 Comrie Street		0.45	69	0.26	33	1.66	49
14	CHILLI'S T/A	13 West High Street		0.56	85	0.72	92	3.00	89
15	ELLIES CELLAR OFF LICENCE	7-8 James Square		1.07	162	0.86	110	4.52	134
16	LLOYDS TSB SCOTLAND	20 High Street		1.28	194	1.26	162	5.96	177
17	COCO BELLE HAIR SALON	54 High Street		1.10	167	0.95	121	4.80	142
18	ROYAL TANDOORI T/A	10 East High Street		0.51	78	0.38	48	2.08	62
	AVERAGE			0.66	100	0.78	100	3.38	100

Note: count data in the above table is in thousands (requires to be multiplied by 1,000).

6.4.2 **Distribution of floorspace-** is shown in detail in section 4 for Crieff town centre in Tables 4.1 and 4.2, together with the accompanying graphs. The limited proportion of floorspace devoted to comparison floorspace reflects the role of Crieff as a smaller town centre with the role of regional service centre (Tier 2 centre in the LDP). Nearly half the floorspace is taken up by services including, restaurants, cafes, take-aways, personal services, banks, professional/ property service and miscellaneous. Overall, the variety is medium for a town of this size and it has proven sufficient to continue to attract visitors over the years.

6.4.3 **Quality of the built environment-** in general, the quality of environment is fair, although parts of the town centre suffer from busy through traffic along the A85. Crieff has a conservation area designation and there are a number of listed buildings. The building frontages and streetscapes appear generally of fair quality. The town centre environment was rated as average by nearly half the respondents in the household survey, but rated as good by over 30% (Table 5.2). In the business survey, the majority rated the town centre environment as poor/ average (Table 5.4). Improvements to the town centre streetscape and building frontages were considered essential by nearly 65% of the respondents (Table 5.5). Better street cleanliness was also sought by most of the respondents.

6.4.4 **Recent and proposed investment-** funding of £40K has been provided by the Council to the Crieff Community Trust initiative to upgrade shop fronts in the town centre. A BID project is also progressing with the aim of strengthening the attraction of Crieff for tourists. There are also proposals for expansion of lodge development and other facilities at the Crieff Hydro, which will assist the promotion of Crieff as a visitor destination to the benefit of the town centre shops and services.

6.4.5 **Accessibility-** Crieff is situated on the A85 with ready access to Perth and the A9. This road also links with the Loch Earn, Loch Tay and Callander tourist areas. Its rural location means that it is not quickly accessible from the major conurbations, except Perth. With the A85 passing straight through the town, it does not have a particularly pedestrian friendly access and half the respondents to the business survey comment that this feature is largely average/ poor quality (Table 5.4).

6.4.6 There is a mix of off-street and on-street parking, with 3 car parks providing 128 spaces plus 109 on-street spaces (Council data). Parking was rated mostly poor/average in the household survey (Table 5.2). The level of parking, location and costs were mostly rated poor/ average in the business survey (Table 5.4) with improvements to this situation strongly rated as essential (Table 5.5). Crieff is served by 10 bus services (*15A, 18A, 18B, 45, 46, 47A, 155, 601, 602 and, 603).* Bus services were rated as mostly average/ good in the business survey (Table 5.4). Overall, accessibility could be described as moderate quality generally.

6.4.7 **Attitudes and perceptions of the town centre**- were recorded by the household and business surveys and summarised in section 5. The household survey indicated strongly that the main reason for visiting the town centre by far, was for shopping. Other significant reasons included visiting restaurants, cafes, financial institutions etc. More/ better shops emerged as the main reason that people mentioned would attract them to visit the centre more often, followed by improved parking. The household survey indicated that most respondents considered that the town centre was a pleasant place to visit (Table 5.2), though less strongly in the business survey (Table 5.4). Also in the business survey, more events, more marketing and improved provision for visitors featured as essential improvements (Table 5.5). Overall, attitudes suggest scope for improvement over a range of issues, especially with a focus on promoting the town for tourists.

6.4.8 **Retailer representation and demand-** multiple retailer representation is 7% (11/167) in the town centre (excluding charity shops), which is a fairly low level compared to other small towns, such as Kinross 10%, Pitlochry 12%, Monifieth 15% and Brechin 9%. The proportions are based on the Goad survey. Crieff relies heavily on its range of independent retailers, which also cater for visitors, so the low multiple representation is not necessarily a weakness. Results of the household survey indicated that the quality of shopping was good, but the range and choice was closer to average. The findings of the business survey were more critical, especially about the range and quality of shops. Limited convenience shopping until the new Tesco opens.

6.4.9 **Retail rents and yields-** current Zone A retail rents are in the range £6 to £14 per sq m. Commercial yields are estimated to be around 8.5% to 9%.

6.4.10 **Vacancy rates-** the vacancy rate in the town centre is 7.8%, compared to the average for town centres in Scotland of 14.5% (section 4),which is much better than average. Comparison with other centres is provided in Table 4.3.

6.4.11 **Cultural and social events-** the Crieff Highland Games are planned in August to celebrate 'The Homecoming' and there is also a high street arts festival. The town also has a monthly market, featuring foods and crafts.

6.4.12 **Leisure and cultural facilities, including the evening economy-** Crieff is well provided-for in terms of the community and sports facilities at the Strathearn Community Campus, located close to the town centre. It has sports halls, studios, a gym, swimming pool and other facilities including a library and conference facilities. Leisure uses in the town centre itself are limited to halls and betting. Crieff also has a visitor centre, which includes Caithness Glass. Otherwise, Crieff is a base for exploring numerous visitor attractions in the wider area (museums, wildlife parks etc) and it is a visitor destination.

6.4.13 Results of the household survey (Table 5.1), show that the frequency of visits to the town centre in the evenings was limited (1% weekly, 11% between one and three times a month), 15% less frequently than once a month, with 72% stating that they never visit in the evenings). These figures suggest potential for creating increased attraction. Table 5.3 reveals that the predominant reasons for visiting the town centre were to visit restaurants/ cafés and to buy take-aways. Other reasons only featured in low proportions. The business survey rated the range and choice of eating places as good/ average. With a relatively narrow range of evening attractions, the potential for increasing the evening economy will probably relate mostly to improving the quality of offer, as the town is too small a market too small to support major facilities such as in the cities.

6.4.14 **Crime and safety-** security issues did not feature much in the household survey findings, with about 1% mentioning the issue as a 'dislike' of the town centre. In the business survey findings (Table 5.5), there was a higher level of concern about security and reducing loitering and vandalism.

6.4.15 **Sense of place-** Crieff has a strong identity and it is a significant visitor destination, as recognised in the STEAM visitor data and in the findings of the business survey. The town is attractive, but requires continued efforts to improve its environmental quality and range of shops, especially for marketing to visitors. Among its strengths is its setting in the attractions of the Strathearn countryside.

6.4.16 **SWOT summary**

Strengths	Weaknesses
• Historic town	• Improvement to building frontages and street environment needed
• Visitor destination and a pleasant place to visit generally. Has a visitor centre	• Limited range and choice of shops, but quality is reasonable
• Good base for visiting the Strathearn countryside, plus Crieff Hydro	• Surveys indicate the need for Improved parking
• Good sports and leisure facilities in the Strathearn Community Centre	• More facilities for visitors in the town centre itself are needed
• Low vacancy rate	• Trunk road through the town
• Strong sense of place	
Opportunities	**Threats**
• Potential to increase the attraction to Crieff town centre as a destination, including marketing initiatves	• Continuation of the economic climate, causing reduced spending/ town centre investment
• Potential to boost the evening economy by attracting more people into the centre	• Increasing competition from other centres, including visitor attraction
• New Tesco supermarket being developed, with potential to claw back expenditure leakage	• Increasing internet spending
• Improve range of shops focussed on visitors	• Any reduction in effort to improve the commercial offer and environmental quality
• Grant funding to upgrade shop fronts and BID initiative	

6.5 Kinross Town Centre Healthcheck

6.5.1 **Pedestrian flow counts-** were undertaken by PMRS Ltd (Pedestrian Market Research Services) in Kinross town centre Counts were made over two days (Friday and Saturday) and the figures grossed up to provide weekly counts (a standard method). In Kinross, 10 count points were included (28th/29th March) and the busiest points were at 52 High St (by Co-op) at 4,980 per week and at 83 High Street (by Ballie's) at 3,110 per week. The lowest counts were at 118 High Street and at 146 High Street. More detail is provided in the separate report by PMRS, which has been provided to the Council, including a map showing the survey points. They represent baseline information for future monitoring, as they were specially commissioned for this study, so there is no trend information.

NO	OCCUPIER	STREET & ADDRESS	NOTE	FRIDAY COUNT	FRIDAY INDEX	SATURDAY COUNT	SATURDAY INDEX	WEEK COUNT	WEEK INDEX
1	THE DOG HOUSE PET FOOD	118 High Street		0.20	42	0.23	37	0.99	39
2	HUNTERS BUTCHERS	104 High Street		0.51	109	0.77	127	3.00	119
3	SUNRISE CHINESE T/A	78 High Street		0.57	122	0.74	122	3.07	122
4	CO-OP	52 High Street		0.96	206	1.16	192	4.98	198
5	KIRKLANDS HOTEL	20 High Street		0.26	55	0.27	45	1.24	49
6	ROYAL BANK OF SCOTLAND	55 High Street		0.66	141	0.63	105	3.04	121
7	BAILLIES CONV STORE	83 High Street		0.54	116	0.78	130	3.11	124
8	BAYNE'S BAKERS	101 High Street		0.48	103	0.83	137	3.07	122
9	FIFE COMPUTERS	113 High Street		0.27	58	0.38	62	1.52	60
10	CUSTOM HOUSE PROPERTY	146 High Street		0.23	48	0.26	42	1.13	45
	AVERAGE			0.47	100	0.60	100	2.51	100

Note: count data in the above table is in thousands (requires to be multiplied by 1,000).

6.5.2 **Distribution of floorspace-** is shown in detail in section 4 for Kinross town centre in Tables 4.1 and 4.2, together with the accompanying graphs. It is among the smallest Tier 2 centres. Kinross town centre has the lowest proportion of floorspace devoted to comparison floorspace among the smaller town centre in this study –see Table 4.1. The proportion of floorspace for convenience retailing is also low in the town centre, but it excludes the out of centre Sainsbury's supermarket, which is a good provision for the town. Over half the floorspace comprises services including, restaurants, cafes, take-aways, personal services, banks, professional/ property service, post office sorting, and medical. Overall, the variety is limited.

6.5.3 **Quality of the built environment-** in general, the quality of environment is moderate, but it is an historic town with a number of listed buildings. The town centre is included within a conservation area. Parts of the town centre have attractive historic frontages, but there is also a mix of less attractive, poor quality modern properties and older buildings with unattractive paintwork/ window conversions etc. There are some vacant buildings, including the prominent former Town Hall. The streetscape is in need of considerable improvements (see investment below). The town centre environment was rated as mainly average/ poor by the respondents in the household survey and rated as poor in the business survey (Tables 5.2 and 5.4). Improvements to the town centre streetscape and building frontages were considered essential by 63% of the business survey respondents (Table 5.5). Better street cleanliness was also sought by half the respondents.

6.5.4 **Recent and proposed investment-** appropriately to address some of the environmental issues, £1.2 million has been allocated for funding public realm improvements. Proposals for conversion of the Town Hall to flats have been approved.

6.5.5 **Accessibility- Kinross** is close to the M90, giving it excellent accessibility to Perth, Dunfermline and via connecting roads to Glenrothes and Kirkcaldy. It is closely linked to the neighbouring town of Milnathort. Kinross has a large commuter population. The minor B996 passes through the town centre, which gives the High Street a narrow feel in places, reinforced by the narrow pavements. Kinross does not have a particularly pedestrian friendly access and half the respondents to the business survey comment that this feature is largely average/ poor quality (Table 5.4).

6.5.6 There are car parks at Curate Wynd, School Wynd and The Causeway with a total of 74 spaces. In addition, there is a park and ride facility by the M90 access with 126 spaces. Parking was rated mostly poor/average in the household survey (Table 5.2). The level of parking, location and costs were mostly rated poor in the business survey (Table 5.4) with improvements to this situation strongly rated as essential (Table 5.5). Kinross is served by 13 bus services, plus City Link (*23, 31, 56, 56A, 56B, 66, 201, 202, 203, 204, 205, 622, 624, & City Link*) . Bus services were rated as mostly average in the business survey (Table 5.4). Overall, accessibility could be described as good generally.

6.5.7 **Attitudes and perceptions of the town centre**- were recorded by the household and business surveys and summarised in section 5. The household survey indicated strongly that the main reason for visiting the town centre was for food shopping and visiting financial services (it is assumed that the respondents meant Sainsbury's, although it is out of centre.

6.5.8 Other significant reasons included visiting restaurants, cafes, financial institutions etc. More/ better shops emerged as the main reason that people mentioned would attract them to visit the centre more often, followed by improved parking. The household survey indicated that most respondents considered that the town centre was a pleasant place to visit (Table 5.2), though less strongly in the business survey (Table 5.4). Also in the business survey, more events, more marketing and improved provision for visitors featured as essential improvements (Table 5.5). Overall, attitudes suggest scope for improvement over a range of issues.

6.5.9 **Retailer representation and demand-** multiple retailer representation is 10% (6/58) in the town centre (excluding charity shops), which can be compared to other small towns as follows: Crieff 7% Pitlochry 12%, Monifieth 15% and Brechin 9%. The proportions are based on the Goad survey. Results of the household survey indicated that the quality of shopping was good/ average, but the range and choice was mainly average/poor, which reflects the small scale of offer. The findings of the business survey were more critical, especially about the range and quality of shops which was largely rated as poor.

6.5.10 **Retail rents and yields-** current Zone A retail rents are around £12 per sq. Commercial yields are estimated to be around 9% to 9.5%.

6.5.11 **Vacancy rates-** the vacancy rate in the town centre is 13.8%, compared to the average for town centres in Scotland of 14.5% (section 4), which is slightly lower than average. Comparison with other centres is provided in Table 4.3.

6.5.12 **Cultural and social events-** Kinross has an annual road cycling event ' Sportive Kinross'. There are various clubs, guided specialist nature walks at Loch Leven, bands/ music at the Green Hotel, an antique fair and a Sunday market. The annual major rock music event- T in the Park- takes place by Kinross.

6.5.13 **Leisure and cultural facilities, including the evening economy-** Kinross is well provided-for in terms of the community and sports facilities at the nearby Lochleven Community Centre. It has sports halls, studios, a gym, swimming pool and other facilities including conference facilities. Leisure uses in the town centre itself are limited. The proximity to Loch Leven provides opportunities for visitors to enjoy wildlife experiences, while provide a context for the town. There is a recently opened path network around the Loch.

6.5.14 Results of the household survey (Table 5.1), show that the frequency of visits to the town centre in the evenings was limited (3% weekly, 9% between one and three times a month), 14% less frequently than once a month, with 63% stating that they never visit in the evenings). These figures suggest potential for creating increased attraction. Table 5.3 shows that the predominant reasons for visiting the town centre were to visit restaurants/ cafés and to buy take-aways, but sports activities and community activities were an important reason too (may be referring to the Community Centre). The business survey rated the range and choice of eating places as mostly poor, but nearly one third described them as good (Table 5.4). With a relatively narrow range of evening attractions in the town centre itself, the potential for increasing the evening economy will probably relate mostly to improving the quality of offer.

6.5.15 **Crime and safety-** security issues did not feature as a 'dislike' in the household survey findings at all. In the business survey findings (Table 5.5), improved security was rated 'quite important' by over 60% of the respondents.

6.5.16 **Sense of place-** Loch Leven and the surrounding countryside mainly give Kinross its sense of place. The town centre has a pleasant, but not particularly distinctive character when compared to many other small towns. There are limited places of interest for people to wander about in the town centre. Its location on a minor road, close to the M90, gives it a backwater feeling. Environmental improvements, increased linkages with Loch Leven and improved marketing (as suggested by the business survey findings), would all assist in giving the town a higher profile and create a greater sense of place to attract people. The town is essentially commuter- orientated and it may prove harder to attract greatly increased visitor numbers compared with the other small towns.

6.5.17 **SWOT summary**

Strengths	Weaknesses
• Historic town	• Improvement to building frontages and street environment/ public realm needed
• Proximity to Loch Leven and countryside	• Limited range and choice of non- food shops
• Good accessibility	• Little for visitors to do in the town centre
• Good sports and leisure facilities in the Loch Leven Community Centre	• Very limited profile in a quiet location off the M90
• Good supermarket provision nearby	• Greater sense of place needs to be generated
• Secure commuter population- fair prosperity combined with a degree of captive local market by geography	
Opportunities	**Threats**
• Some potential to increase the attraction to Kinross town centre as a destination, including marketing initiatves	• Continuation of the economic climate, causing reduced spending/ town centre investment
• Potential to boost the evening economy by attracting more people into the centre	• Any reduction in effort to improve the commercial offer and environmental quality
• Funding for public realm improvements approved	• Any failure to increase marketing of the town

7 Convenience retail expenditure and turnover

7.1 Introduction

7.1.1 This section of the report examines the convenience expenditure and turnover relationships in Perth & Kinross, taking account of the current shopping patterns based on the household survey for this report. The analysis covers each of the five sub areas, and the Council area as a whole.

7.2 Convenience expenditure potential

7.2.1 Table 7.1 shows the forecast expenditure per capita data for Perth & Kinross based on data commissioned from Pitney Bowes for this study. These forecasts by Pitney Bowes specifically take account of the socio economic structure of the area.

7.2.2 Special forms of trading (SFT), including internet shopping, are removed from the expenditure per capita data, so that it relates to conventional shop floorspace, as shown in Table 7.1. The proportion of SFT is projected to increase up to 2024. It should be noted that the proportions of SFT shown in this table do not include internet home delivery coming from existing supermarket shelves.

7.2.3 Forecasts of the total convenience expenditure potential of the residents of each sub area are shown in Table 7.2. The growth rate to 2024 is the result of combining projected population growth with the forecast growth in expenditure per capita.

Table 7.1
Perth & Kinross residents' convenience expenditure per capita per annum (in 2012 prices)

2012 £	2014 £	**2018** £	2019 £	**2023** £	2024 £
2,119	2,095	2,047	2,047	2,049	2,049
**Excluding special forms of trading (SFT)*					
2,070	2,047	1,998	1,998	1,998	1,998

Sources;
Figures in bold are from the Pitney Bowes' projected expenditure data commissioned for the study area. Figures for the other years are interpolations/ extrapolations.
Deductions require to be made to allow for special forms of trading (SFT- internet expenditure ,mail order etc), which do not relate to conventional floorspace. On page 28 (Table 3.2) of the *Retail Expenditure Guide 2013-14* by Pitney Bowes, the following estimates of convenience SFT are made in relation to non store sales:

2012	2014	2018	2019	2023	2024
2.3	2.3	2.4	2.4	2.5	2.5

This excludes items picked from shelves as internet sales, or otherwise associated with retail floorspace.

Table 7.2
Perth & Kinross residents' convenience expenditure potential (in 2012 prices)

(excluding special forms of trading) Sub area	2014 £ million	2019 £ million	2024 £ million
Perth	175.5	179.1	187.6
Kinross	25.0	25.5	26.7
Strathearn	42.4	43.3	45.3
Highland	24.1	24.6	25.8
Strathmore & The Glens	40.2	41.0	42.9
Total Perth & Kinross Council area	307.3	313.6	328.3

Note
From Table 2.1 and Table 7.1. See text on population growth rate and expenditure per capita growth rate

7.3 Market shares by sub area

7.3.1 Market shares refer to the proportions of expenditure from residents of a defined area which are spent in that area and in other areas. Table 7.3 shows the convenience market shares for each sub area, based on the household survey - see Appendix 4. More detail on the specific stores/ centres visited is shown in the graphs overleaf. Internet/ delivery shopping accounted for just over 4% of the responses overall, with the following reported delivery shares: ASDA 51%, Tesco 48% and Sainsbury's 1%.

7.3.2 Table 7.3 reveals that 85% of convenience shopping by Perth residents is done locally, with the balance mainly in locations outside the Council area. In Kinross, 45% of convenience shopping is done locally, with substantial proportions in Perth and outside the Council area. In Strathearn, just over half the convenience shopping is done outside Perth & Kinross, with the balance undertaken in Strathearn and Perth.

7.3.3 In the Highland sub area, 55% of convenience shopping is undertaken in Perth, with most of the balance in Highland. In Strathmore & The Glens, 63% of convenience shopping is done locally, with most of the rest in Perth and in locations outside the Council area. Overall, the leakage of convenience expenditure from the Council area as a whole is 20%.

7.3.4 Development of the supermarket consents in Crieff and Pitlochry will no doubt greatly increase the retention of expenditure in their related sub areas.

7.4 Convenience expenditure and turnover by sub area

7.4.1 The relationship between total expenditure and turnover in each sub area is defined simply as: residents' expenditure potential plus inflows, less outflows equals total turnover.

7.4.2 Appendix 5 shows the estimates of expenditure inflows to each sub area in detail, based on the household survey, visitor spending (Visit Scotland and STEAM data) and estimated inflows from neighbouring local authority areas. Total estimated convenience expenditure inflows to Perth & Kinross amount to around £30 million, of which nearly half goes to Perth. The expenditure outflows in Appendix 6 also derive from the household survey.

7.4.3 Tables 7.4 to 7.9 show the survey based convenience expenditure and turnover relationships for each sub area and for Perth & Kinross in 2014, 2019 and 2024.

7.4.4 While Perth attracts most convenience expenditure inflows, visitor spending is a significant proportion of the totals in the Strathearn and Highland sub areas, owing to the attractions of Crieff, Pitlochry and the House of Bruar.

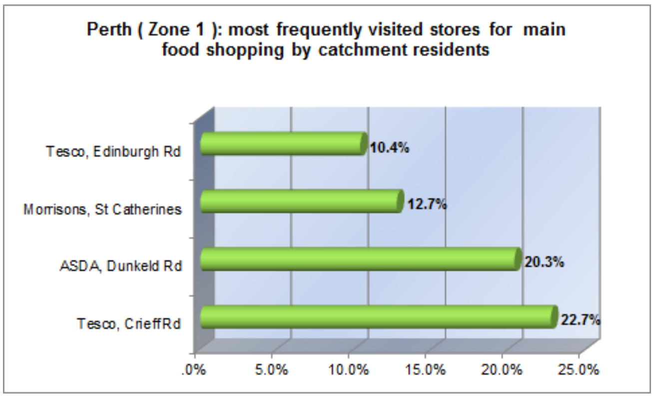
Table 7.3
Where residents of each sub area do their convenience shopping (market shares)

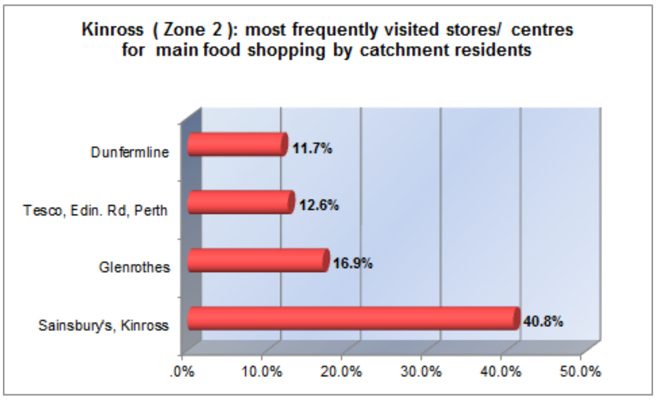
	Origin Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
Destination						
Zone 1- Perth	85%	20%	26%	55%	20%	60%
Zone 2 - Kinross	1%	45%	1%	0%	0%	4%
Zone 3 - Strathearn	0%	2%	20%	0%	0%	3%
Zone 4 - Highland	1%	0%	0%	43%	1%	4%
Zone 5 - Strathmore & The Glens	0%	0%	0%	1%	63%	9%
Outside study area	12%	33%	53%	1%	16%	20%
Total	100%	100%	100%	100%	100%	100%

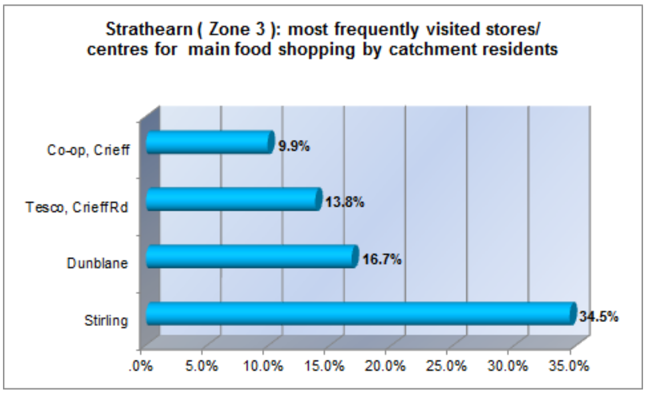
Note
Based on the household survey results for main food and top-up shopping w eighted and combined-see Appendix 4.
The percentages are show n rounded to the nearest w hole number.

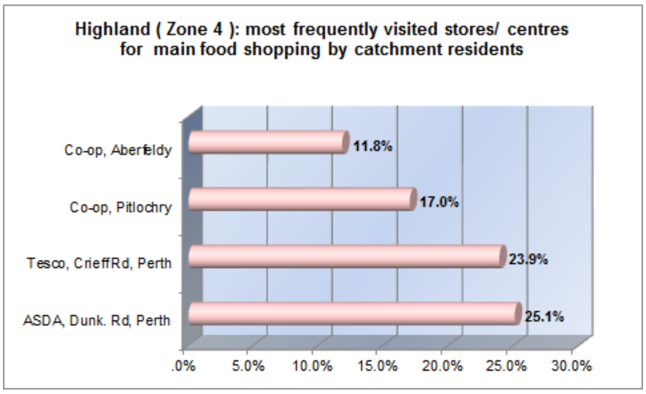
Main food shopping patterns by sub area- household survey

Q1 & Q3 combined, excluding don't knows, varies, internet









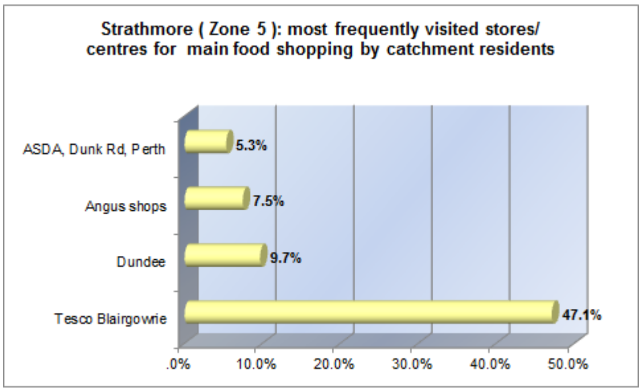


Table 7.4
Perth catchment (Zone1): convenience expenditure and turnover (in 2012 prices)

	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		175.5	179.1	187.6
Add: inflows from rest of Perth & Kinross	21%	37.0	37.7	39.5
inflows from outside Perth & Kinross	8%	14.0	14.2	14.9
Less: outflows	-15%	-26.1	-26.6	-27.9
Retained expenditure (turnover)		200.4	204.5	214.1

Note
Inflows and outflows from Appendix 5

Table 7.5
Kinross catchment (Zone 2): convenience expenditure and turnover (in 2012 prices)

	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		25.0	25.5	26.7
Add: inflows from rest of Perth & Kinross	7%	1.9	1.9	2.0
inflows from outside Perth & Kinross	1%	0.4	0.4	0.4
Less: outflows	-55%	-13.7	-14.0	-14.6
Retained expenditure (turnover)		13.6	13.8	14.5

Note
Inflows and outflows from Appendix 5

Table 7.6
Strathearn catchment (Zone3): convenience expenditure and turnover (in 2012 prices)

	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		42.4	43.3	45.3
Add: inflows from rest of Perth & Kinross	3%	1.1	1.2	1.2
inflows from outside Perth & Kinross	13%	5.4	5.6	5.8
Less: outflows	-80%	-33.7	-34.4	-36.1
Retained expenditure (turnover)		15.2	15.5	16.3

Note
Inflows and outflows from Appendix 5

Table 7.7
Highland catchment (Zone4): convenience expenditure and turnover (in 2012 prices)

	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		24.1	24.6	25.8
Add: inflows from rest of Perth & Kinross	8%	2.0	2.0	2.1
inflows from outside Perth & Kinross	31%	7.4	7.5	7.9
Less: outflows	-57%	-13.8	-14.0	-14.7
Retained expenditure (turnover)		19.8	20.2	21.1

Note
Inflows and outflows from Appendix 5

Table 7.8 Strathmore & The Glens catchment (Zone 5): convenience expenditure and turnover (in 2012 prices)				
	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		40.2	41.0	42.9
Add: inflows from rest of Perth & Kinross	2%	0.8	0.9	0.9
inflows from outside Perth & Kinross	7%	2.8	2.8	3.0
Less: outflows	-37%	-14.9	-15.2	-15.9
Retained expenditure (turnover)		28.9	29.5	30.9
Note Inflows and outflows from Appendix 5				

Table 7.9 Perth & Kinross: convenience expenditure and turnover (in 2012 prices)				
	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		307.3	313.6	328.3
Add:				
inflows from outside Perth & Kinross	10%	30.0	30.6	32.0
Less: outflows	-20%	-60.0	-61.2	-64.1
Retained expenditure (turnover)		277.9	283.6	296.9
Note Inflows and outflows from Appendix 5				

7.5 Convenience floorspace and turnover 2014

7.5.1 The current distribution of convenience floorspace in Perth & Kinross and in the five sub areas is shown in Table 7.10, based on the latest data provided by Goad (2013) and other sources, including Council data for most of the out of centre main supermarkets.

7.5.2 The current total of some 54,500 sq m gross compares to the total of 51,300 sq m gross in the 2011 Capacity Study. The main additions are the M&S Simply Food at Inveralmond and the inclusion of shops in Alyth from a recent survey.

7.5.3 Average company turnover/ floorspace ratios from the Retail Rankings 2014 are applied, with adjustments to include VAT and remove petrol/ non-retail sales, expressed in 2012 prices. These ratios are applied to the main supermarkets, with estimated average ratios applied to other shops. The turnover ratios in the 2014 Retail Rankings are well down from previous years. Table 7.10 shows the total average turnover in each catchment at average levels, based on this method.

7.5.4 Comparison with the survey based totals (actual turnover) is included for each catchment in Table 7.10, to indicate where there is any over or under-trading. From the table, the total over-trading in Perth & Kinross is low at 9%.

7.5.5 However, there are significant variations in trading among the five sub areas. Over-trading in the Perth sub area is 16% and very high at 62% in the Highland sub area, which is supportive of the supermarket consent there. Trading is close to average levels in Strathearn, but Kinross and Strathmore sub areas are substantially under-trading, mostly because of the high levels of convenience expenditure outflow.

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

Table 7.10
Perth & Kinross: convenience floorspace and turnover, 2014 (in 2012 prices)

	Floorspace sqm gross	Floorspace sqm net	Turnover ratio £/sq m	Turnover at average level £million
PERTH				
(1) **Perth City Centre total**	**8,357**	**5,564**		**41.6**
Tesco Metro, South Street	1,990	1,393	9,622	13.4
Marks & Spencer foodhall	1,077	700	9,536	6.7
Sainsbury's Local	330	248	15,375	3.8
Rest of City Centre	4,960	3,224	5,500	17.7
(2) **Perth out of centre stores- total**	**24,590**	**14,705**		**131.8**
ASDA (7,833 sq m gross)-60% conv	4,700	2,820	11,495	32.4
Morrison (4,965 sq m gross)-90% conv	4,469	2,234	11,900	26.6
Tesco, Edinburgh Rd (5,300 sq m gross)-75% conv	3,975	2,385	9,622	22.9
Tesco, Crieff Rd (7,863 sq m gross)-65% conv	5,111	3,067	9,622	29.5
Lidl, Riggs Road total 1,407 sq m gross- 85% conv	1,196	897	4,070	3.7
Aldi, Glasgow Rd total 1,160 sq m gross- 85% conv	986	740	4,070	3.0
M&S Simply Food, Inveralmond-unit 7b (2,393 sq m total - 989 sq m (7a)	1,404	913	9,536	8.7
(3) Other Perth	2,750	1,650	3,000	5.0
Total at average levels	32,947	20,269		**173.4**
Over-trading			*16%*	*27.0*
Total from survey (actual levels)				**200.4**
KINROSS				
(1) Sainsbury's (out of centre) 2,900 sq m gross- 90% conv	2,610	1,566	10,024	15.7
(1) Other shops	950	618	3,000	1.9
Total at average levels	3,850	2,184		**17.6**
Under-trading			*-23%*	*-4.0*
Total from survey (actual levels)				**13.6**
STRATHEARN				
(1) **Crieff**				
Co-op	1,450	943	8,628	8.1
Other shops	1,470	956	3,000	2.9
(4) **Auchterarder**				
Co-op	780	468	6,000	2.8
Other Auchterarder shops	683	410	3,000	1.2
Blackford & Dunning	303	182		
Total at average levels	4,686	2,958		**15.0**
Over-trading			*1%*	*0.2*
Total from survey (actual levels)				**15.2**
HIGHLAND				
(5) **Aberfeldy** 10 units	1,500	900	3,000	2.7
(1) **Pitlochry**				
Co-op	1,150	748	8,628	6.4
Other Pitlochry shops	1,180	767	3,000	2.3
(6) Dunkeld	400	240	3,000	0.7
Total at average levels	4,230	2,655		**12.2**
Over-trading			*62%*	*7.6*
Total from survey (actual levels)				**19.8**
STRATHMORE & THE GLENS				
(1) **Blairgowrie**				
Tesco total 4,480 sq m gross- 85% conv	3,808	2,285	9,622	22.0
Co-op	1,060	689	8,628	5.9
Other shops	1,450	943	3,000	2.8
(5) **Alyth** 9 units	1,350	810	3,000	2.4
(7) **Coupar Angus** 4 units	600	360	3,000	1.1
Co-op -out of centre	500	300	6,000	1.8
Total at average levels	8,768	5,386		**36.1**
Under-trading			*-20%*	*-7.1*
Total from survey (actual levels)				**28.9**
Total Perth & Kinross at average levels	**54,481**	**33,451**		**254.2**
Overtrading			*9%*	*23.7*
Total Perth & Kinross at actual levels (from survey)				**277.9**

Note: Estimated net/ gross floorspace ratios vary betw een store types, Goad data and other sources, as indicated.
Average supermarket turnove ratios based on the Retail Ranking 2014, adjusted to remove petrol sales and incl. VAT
(1) Goad 2013 for tow n centres, except for M&S Foodhall in Perth (estimate)
(2) Council based gross floorspace from previous retail studies, except for 'Other Perth'
(3) Estimate based on 11 neighbourhood Co-ops and Spars identified in Perth/ Scone/Erroll/ Stanley.
(4) Records based on the Assessor in the catchment, Auchterarder Retail Study 2013
(5) Council street survey 2013 for TAYplan research. Estimated convenience floorspace.
(6) Co-op 198 sq m - Assessor, plus 3 others- estimated total
(7) Street survey for TAYplan research 2013 by CA Regeneration Trust- 4 convenience units. Estimated total floorspace

turnover of new development proposals. Others apply average turnover ratios for the strictly convenience floorspace in supermarkets estimated by Verdict and other agencies, as the split by convenience/ comparison is not published in the Retail Rankings. These external estimates are mostly higher than the average ratios published in the Retail Rankings, which relate to food and non-food sales combined.

7.5.7 The weakness of relying on the very high estimated average turnover ratios for convenience floorspace only, is that it fails to recognise that the supermarket operators are often content to trade at lower than these levels in many areas. The approach adopted in this study is to apply the average turnover ratios for supermarkets (food and non-food combined) based on the 2014 Retail Rankings, as the convenience turnover ratio. It is a compromise that goes some way towards meeting market reality, while retaining the all-important benchmarks for estimating the turnover of new proposals.

7.6 Convenience planning consents & opportunities

7.6.1 Table 7.11 shows the current convenience retail planning consents and opportunities in Perth & Kinross. These include consents for new supermarkets in Crieff (Tesco) and Pitlochry (Sainsbury's). In Scone there is a site consent with no operator and a new application has been lodged for detailed consent. Provision for a store in Scone is a commitment in the LDP. Also, Aldi propose to occupy a vacant unit at Inveralmond.

7.6.2 In addition, there is flexibility in the Section 75 Agreement for St Catherine's Retail Park to accommodate 3,350 sq m of convenience retail floorspace. The provision has not been included in Table 7.1 as it is anticipated that the comparison retail use will continue in the meantime.

7.6.3 Otherwise, the main opportunity in this report is for a possible new supermarket in Auchterarder, which has been the subject of a separate Council appraisal of capacity. There is no planning consent or commitment beyond Council recognition of the opportunity. It is included in the current study for consistency, while recognising that there is more uncertainty associated with opportunity sites or store consents with no operator.

7.6.4 Table 7.12 provides broad guidance on the likely pattern of trade diversion to these consents, including the Auchterarder opportunity, assuming they are developed. The Crieff consent is anticipated to claw back leakage to Stirling, Dunblane and Perth. The Pitlochry consent will draw on the local over-trading and claw back leakage to Perth. The Scone consent will largely redistribute turnover in the Perth area, rather than claw back leakage or attract new trade. The proposed Aldi will attract trade from the Highland area, as well as Perth, plus passing trade on the A9. This is relevant in consideration of future convenience expenditure capacity across the sub areas.

Table 7.11
Convenience floorspace in Perth & Kinross: consents and opportunities 2014 (in 2012 prices)

	Floorspace sq m gross	Floorspace sq m net	Turnover ratio £/sq m	Turnover £million
Consents				
Supermarket, land at Duchlage Farm, Crieff (A&L King and Tesco) 08/01955/FLM. Approved in July 2011. Possible completion late 2014. Total 3,425 sq m gross, 2,000 sq m net, with 1,600 sq m conv (80%): 400 sq m comp	2,740	1,600	9,622	15.4
Supermarket, Bridge Rd, Pitlochry (Sainsbury) total 2,417 sq m gross/ 1,393 sq m net. 10/00666/FLM. Split of 80:20 conv: comp sales	1,934	1,114	10,024	11.2
Perth, Inveralmond-unit 6 & 7a - 1,563 sq m gross. 967 sq m net Aldi- approved March 2014. Est split 85% conv: 15% comp.	1,329	822	4,070	3.3
Supermarket, David Douglas Ave, Scone (A&J Stephen Ltd) 09/01311/IPM Approved Jan 2010. 3,500 sq m gross (72% conv) Net floorspace 2,450 sq m: 1,764 sq m conv/ 686 sq m comp floorspace Application for detailed consent now lodged. No named operator, but commitment in LDP	2,520	1,764	10,760	19.0
Opportunities-no commitment				
Auchterarder- potential for a new supermarket of around 1,200 sq m net convenience floorspace (Auchterarder Retail Study 2013)	2,300	1,200	10,760	12.9

Note
Gross floorspace from the Council. Estimated turnover based on company averages from the 2014 Retail Rankings

Table 7.12
Estimated pattern of trade diversion to the convenience planning consents, including an opportunity location with Council recognition (in 2012 prices)

Trade diversion from:	Tesco Crieff	Sainsbury's Pitlochry	Aldi Inveralmond	Supermarket Scone	Auchterarder opportunity
Zone1 Perth	35%	65%	50%	100%	35%
Zone 2 Kinross	0%	0%	0%	0%	0%
Zone 3 Strathearn	10%	0%	5%	0%	5%
Zone 4 Highland	0%	30%	25%	0%	0%
Zone 5 Strathmore & The Glens	0%	5%	0%	0%	0%
Stores outside Perth & Kinross	55%	0%	20%	0%	60%
Total	100%	100%	100%	100%	100%
	£million	£million	£million	£million	£million
Turnover of commitment/ opportunity	15.4	11.2	3.3	19.0	12.9

Note
Total turnover from previous table. The patterns of trade diversion are broad brush estimates. Where 0% is shown, this means very small/ negligible rather than none at all.
Account is also taken of the survey based shopping patterns in this report

8 Spare convenience capacity to 2024

8.1 Introduction

8.1.1 This section provides estimates of the spare convenience retail expenditure capacity that could service new retail floorspace in Perth & Kinross, including each of the five sub areas. The forecasts of spare capacity are for the period 2014-19 and for the ten year period 2014-24, after allowing for the existing planning commitments.

8.2 Definition

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

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

8.2.2 A range of spare capacity can be prepared from these components, showing a low and high estimate, *after deducting planning commitments*. The **low estimate** includes any over-trading and the forecast growth in expenditure in the sub areas over the target periods. The **high estimate** also includes the potential to claw back leakage and attract new trade into the sub areas. Provision of a range of spare capacity normally reduces the need for sensitivity tests. However, the high estimate is really only relevant to Perth, as explained in the following paragraphs.

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

8.2.4 It should be noted that Perth, with its substantial provision of out of centre supermarkets and superstores, offers most potential for servicing another supermarket, substantially by trade diversion from these stores. However, diversion from the city centre would be subject to scrutiny to avoid potential adverse effects.

8.3 Spare convenience expenditure capacity

8.3.1 **Low estimates**- Tables 8.1 to 8.6 show the forecast spare convenience expenditure for each of the five sub areas and for the Council area in total, at the low end of the range.

8.3.2 Assuming the current consents are developed, there is predicted negative capacity in Kinross, Strathearn and Strathmore & The Glens, which indicates under-trading at below average levels after the commitments, with limited ability to accommodate further convenience retail development.

8.3.3 In the Highland sub area, there is a predicted low level of spare capacity after development of the Sainsbury’s consent in Pitlochry. This could support small unit developments, or store extensions, for example.

8.3.4 In Perth, under the low estimate, there is negative capacity over the next five years and minimal capacity over the next ten years. It is a consequence of the effect of the current planning consents, assuming they are implemented.

8.3.5 **High estimate**- For estimates at the high end of the range to apply, there would have to be potential to accommodate a large supermarket or superstore which would be capable of reducing leakage and attracting new trade. A large store development would also generate significant additional trade diversion locally.

8.3.6 Apart from Perth, none of the sub areas have sufficient capacity for the high forecast to be relevant after trade diversion to the commitments.

8.3.7 Even when the high estimate is applied to Perth in Table 8.1, there would not be capacity to support anything more than a mid-size supermarket over the next ten years. In isolation, this may be unrealistic in terms of meeting the criteria for the high forecast to apply, unless trade diversion is taken into account.

8.3.8 The ability to claw back leakage from the sub area will be limited by the fact that there is already substantial supermarket representation in Perth. Also, the probability of attracting significant new trade into Perth will be limited by geography and also the scale of existing representation.

8.3.9 However, it is fair to recognise that a larger store could possibly be accommodated in Perth when account is taken of the potential to part-service it by trade diversion from the existing supermarkets. That is the reason why the high estimate has been applied to Perth.

8.3.10 The strict policy limitation is that the impacts do not threaten the vitality and viability of the city centre and other established centres. While the proportion of convenience floorspace in the city centre is not high, it is of key importance in support of the large comparison and service sectors in terms of retaining footfall.

8.3.11 Also, while this study recognises that there is considerable uncertainty associated with implementation of consents with no operator or opportunity sites, any material threat to their potential future viability from trade diversion would present an opportunity cost to the community for the Council to consider.

8.3.12 To conclude on future convenience capacity in Perth, there is limited spare capacity before consideration of trade diversion on other stores (Table 8.1). Our advice is that it would be up to any future supermarket applications to provide a convincing case that the levels of impact on established centres would not threaten their vitality and viability.

Table 8.1 Perth catchment (Zone1): spare convenience expenditure capacity (in 2012 prices)		
Components of spare capacity	2014-19 £million	2014-24 £million
(a) Current over- trading (Table 7.10)	27.0	27.0
(b) Retained expenditure growth (turnover grow th in Table 7.4- from 2014-19 and from 2014-24)	4.1	13.7
(c) Less: convenience planning consents (Table 7.12)		
Tesco Crieff trade diversion: estimate 35% of £15.4 million turnover	-5.4	-5.4
Sainsbury's Pitlochry trade diversion: estimate 65% of £11.2 million turnover	-7.3	-7.3
Aldi Inveralmond trade diversion: estimate 50% of £3.3 million turnover	-1.7	-1.7
Supermarket, Scone: trade diversion	-19.0	-19.0
Auchterarder opportunity trade diversion: estimate 35% of £12.9 million turnover	-4.5	-4.5
Low estimate: Total spare capacity after commitments (a+b-c)	**-6.7**	**2.9**
(d)		
Add: potential to claw back up to, say 30% of outflows (Table 7.4- 2019 & 2024)	8.0	8.4
Add: potential to increase inflows by up to, say 10% (Table 7.4- 2019 & 2024)	5.2	5.4
High estimate: Total spare capacity after commitments (a+b-c+d)	**6.5**	**16.7**
	sq m net	sq m net
*Equivalent net convenience floorspace (rounded to the nearest 100 sq m)		
Low	*-600*	*300*
High	*600*	*1,600*
Note (figures are rounded) The potential to claw back leakage w ill be limited, as the existing supermarke representation in Perth is substantial. An additional supermarket is unlikely to attract more than a small increase in new inflow s, because of the local geography. * Based on the average turnover ratio of ASDA, Tesco, Sainsbury's and Morrisons at £10,760 per sq m net from the Retail Rankings 2014		

Table 8.2 Kinross catchment (Zone2): forecast spare convenience expenditure capacity (in 2012 prices)		
Components of spare capacity	2014-19 £million	2014-24 £million
(a) Current under- trading (Table 7.10)	-4.0	-4.0
(b) Retained expenditure growth (turnover grow th in Table 7.5- from 2014-19 and from 2014-24)	0.3	0.9
(c) Less: convenience planning consents (Table 7.12) No significant diversion from Kinross stores		
Total spare capacity after commitments (a+b-c)	**-3.7**	**-3.0**
Note (figures are rounded)		

Table 8.3 **Strathearn catchment (Zone3): forecast spare convenience expenditure capacity** **(in 2012 prices)**		
Components of spare capacity	2014-19 £million	2014-24 £million
(a) Current over- trading (Table 7.10)	0.2	0.2
(b) Retained expenditure growth (turnover growth in Table 7.6- from 2014-19 and from 2014-24)	0.3	1.0
(c) Less: convenience planning consents (Table 7.12)		
Tesco Crieff trade diversion: estimate 10% of £15.4 million turnover	-1.5	-1.5
Aldi Inveralmond trade diversion: estimate 5% of £3.3 million turnover	-0.2	-0.2
Auchterarder opportunity trade diversion: estimate 5% of £12.9 million turnover	-0.6	-0.6
Total spare capacity after commitments (a+b-c)	**-1.8**	**-1.1**
Note (figures are rounded)		

Table 8.4 **Highland catchment (Zone 4): forecast spare convenience expenditure capacity** **(in 2012 prices)**		
Components of spare capacity	2014-19 £million	2014-24 £million
(a) Current over- trading (Table 7.10)	7.6	7.6
(b) Retained expenditure growth (turnover growth in Table 7.7- from 2014-19 and from 2014-24)	0.4	1.4
(c) Less: convenience planning consents (Table 7.12)		
Sainsbury's Pitlochry trade diversion: estimate 30% of £11.2 million turnover	-3.4	-3.4
Aldi Inveralmond trade diversion: estimate 25% of £3.3 million turnover	-0.8	-0.8
Total spare capacity after commitments (a+b-c)	**3.8**	**4.7**
Note (figures are rounded)		

Table 8.5 **Strathmore & Glens catchment (Zone 5): forecast spare convenience expenditure capacity** **(in 2012 prices)**		
Components of spare capacity	2014-19 £million	2014-24 £million
(a) Current under- trading (Table 7.10)	-7.1	-7.1
(b) Retained expenditure growth (turnover growth in Table 7.8- from 2014-19 and from 2014-24)	0.6	2.0
(c) Less: convenience planning consents (Table 7.12) Sainsbury's Pitlochry trade diversion: estimate 5% of £11.2 million turnover	-0.6	-0.6
Total spare capacity after commitments (a+b-c)	**-7.1**	**-5.7**
Note (figures are rounded)		

Table 8.6 **Perth & Kinross total: forecast spare convenience expenditure capacity** **(in 2012 prices)**		
Components of spare capacity	2014-19 £million	2014-24 £million
(a) Current over- trading (Table 7.10)	23.7	23.7
(b) Retained expenditure growth (turnover growth in Table 7.9- from 2014-19 and from 2014-24)	5.7	19.1
(c) Less: convenience planning consents (Table 7.12)		
Tesco Crieff trade diversion: estimate 45% of £15.4 million turnover	-6.9	-6.9
Sainsbury's Pitlochry trade diversion: estimate 100% of £11.2 million turnover	-11.2	-11.2
Aldi Inveralmond trade diversion: estimate 80% of £3.3 million turnover	-2.7	-2.7
Supermarket, Scone: trade diversion	-19.0	-19.0
Auchterarder opportunity trade diversion: estimate 40% of £12.9 million turnover	-5.2	-5.2
Low estimate: Total spare capacity after commitments (a+b-c)	**-15.6**	**-2.2**
High estimate: includes potential claw back of leakage/ increased inflows- Relates to Perth only- Table 8.1	**6.5**	**16.7**
Note (figures are rounded)		

9 Comparison retail expenditure and turnover

9.1 Introduction

9.1.1 This section of the report examines the comparison expenditure and turnover relationships in Perth & Kinross, taking account of the current shopping patterns based on the household survey for this report. The analysis covers each of the five sub areas, and the Council area as a whole.

9.2 Comparison expenditure potential

9.2.1 Table 9.1 shows the forecast expenditure per capita data for Perth & Kinross based on data commissioned from Pitney Bowes for this study. As with convenience expenditure, these forecasts by Pitney Bowes specifically take account of the socio economic structure of the area. This means that the differences in the socio economic structure between the Council area and the national structure cause differences in the forecast expenditure per capita.

9.2.2 Special forms of trading (SFT), including internet shopping, are removed from the expenditure per capita data, so that it relates to conventional shop floorspace, as shown in Table 9.1. The proportion of SFT is projected to increase up to 2024, and it is higher than for convenience retailing.

9.2.3 Forecasts of the total comparison expenditure potential of the residents of each sub area are shown in Table 9.2.

Table 9.1
Perth & Kinross residents' comparison expenditure per capita per annum (in 2012 prices)

2012 £	2014 £	**2018** £	2019 £	**2023** £	2024 £
3,058	3,216	3,532	3,634	4,040	4,150
**Excluding special forms of trading (SFT)*					
2,621	2,708	2,928	3,005	3,329	3,415

Sources;
Figures in bold are from the Pitney Bowes' projected expenditure data commissioned for the study area. Figures for the other years are interpolations/ extrapolations.
Deductions require to be made to allow for special forms of trading (SFT- internet expenditure ,mail order etc), which do not relate to comparison floorspace. On page 27 (Table 3.1) of the *Retail Expenditure Guide 2013-14* by Pitney Bowes, the following estimates of comparison SFT are made in relation to non store sales, applying Oxford Economics' broad definition:

2012	2014	2018	2019	2023	2024
14.3	15.8	17.1	17.3	17.6	17.7

Table 9.2
Perth & Kinross residents' comparison expenditure potential (in 2012 prices)

(excluding special forms of trading) Sub area	2014 £ million	2019 £ million	2024 £ million
Perth	232.2	269.4	320.6
Kinross	33.1	38.4	45.7
Strathearn	56.1	65.1	77.4
Highland	31.9	37.0	44.1
Eastern	53.1	61.7	73.4
Total Perth & Kinross Council area	406.5	471.5	561.2

Note
From Tables 2.1 and 9.1

9.3 Market shares by sub area

9.3.1 As explained in section 7, market shares refer to the proportions of expenditure from residents of a defined area which are spent in that area and in other areas. Table 9.3 shows the comparison market shares for each sub area, based on the household survey- see Appendix 6.

9.3.2 More detail on the specific stores/ centres most frequently visited by category of goods is shown on the graphs overleaf, from the household survey. There is also a graph showing the proportions of reported internet spending.

9.3.3 Table 9.3 reveals that the main destinations for comparison shopping are Perth and centres outside Perth & Kinross, with limited retention in the small towns. Among all those visiting St Catherine's Retail Park, 30% usually visit the city centre at the same time and 30% reported visiting it occasionally at the same time.

9.3.4 In Perth, 73% of comparison shopping by Perth residents is done locally, with the balance in locations outside the Council area. In Kinross, 50% of comparison shopping is done locally and 46% outside the Council area. In Strathearn, only 7% is retained, with 35% in Perth and 58% done outside the Council area.

9.3.5 In the Highland sub area, 77% of comparison shopping is undertaken in Perth, and 12% retained locally. In Strathmore & The Glens, 9% of comparison shopping is done locally, with most of the rest in Perth (44%) and in locations outside the Council area (47%). Overall, the leakage of comparison expenditure from the Council area as a whole is 34%.

9.4 Comparison expenditure and turnover by sub area

9.4.1 Similar to the analysis in section 7, the relationship between total expenditure and turnover in each sub area is defined simply as: residents' expenditure potential plus inflows, less outflows equals total turnover.

9.4.2 Appendix 7 shows the estimates of comparison expenditure inflows to each sub area in detail, based on the household survey, visitor spending (VisitScotland and STEAM data) and estimated inflows from neighbouring local authority areas. Total estimated comparison expenditure inflows to Perth & Kinross amount to around £64 million, of which over half goes to Perth. The expenditure outflows in Appendix 7 also derive from the household survey.

9.4.3 Tables 9.4 to 9.9 show the survey based comparison expenditure and turnover relationships for each sub area and for Perth & Kinross in 2014, 2019 and 2024.

9.4.4 Similar to the situation for convenience shopping, Perth attracts most comparison expenditure inflows, but visitor spending is a significant proportion of the totals in the Strathearn and Highland sub areas (the latter includes The House of Bruar).

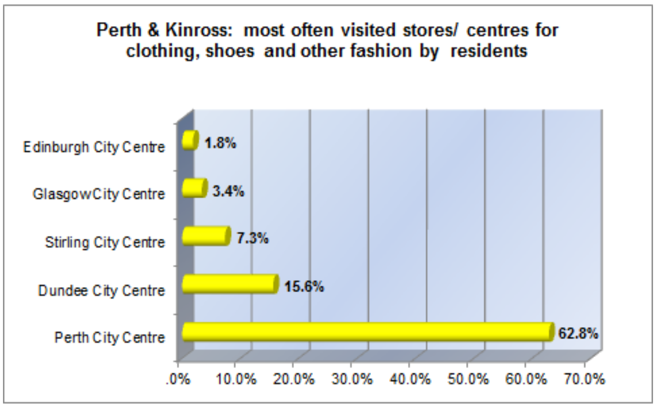
Table 9.3
Where residents of each sub area do their comparison shopping (market shares)

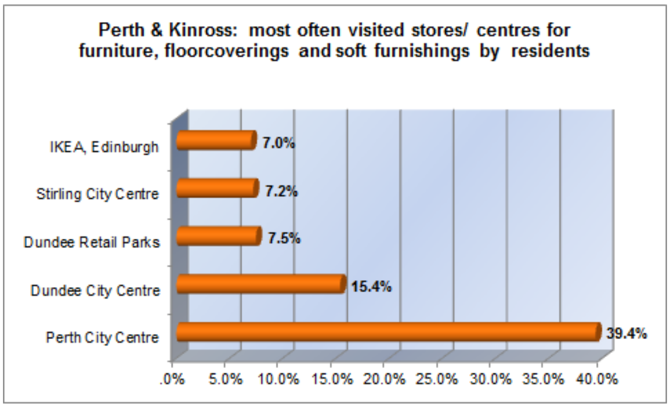
	Origin Zone 1 Perth	Zone 2 Kinross	Zone 3 Strathearn	Zone 4 Highland	Zone 5 Strathmore	Total
Destination						
Zone 1	73%	50%	35%	77%	44%	62%
Zone 2	0%	4%	0%	0%	0%	0%
Zone 3	0%	0%	7%	0%	0%	1%
Zone 4	0%	1%	0%	12%	0%	1%
Zone 5	0%	0%	0%	0%	9%	1%
Outside study area	27%	46%	58%	11%	47%	34%
Total	100%	100%	100%	100%	100%	100%

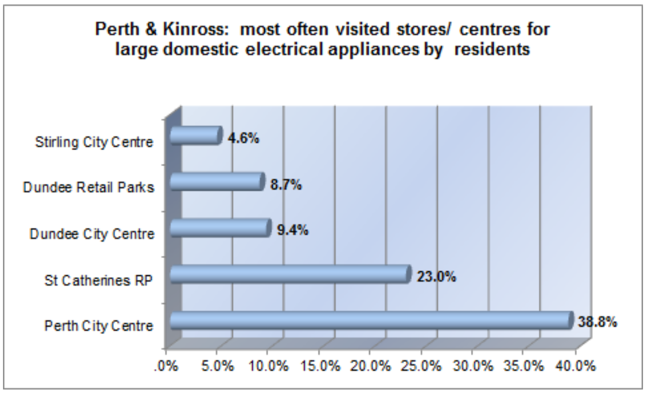
Note
Based on the household survey results for shopping by categories of goods (Q9 to Q13), w eighted and combined-see Appendix 6.
The percentages are show n rounded to the nearest w hole number.

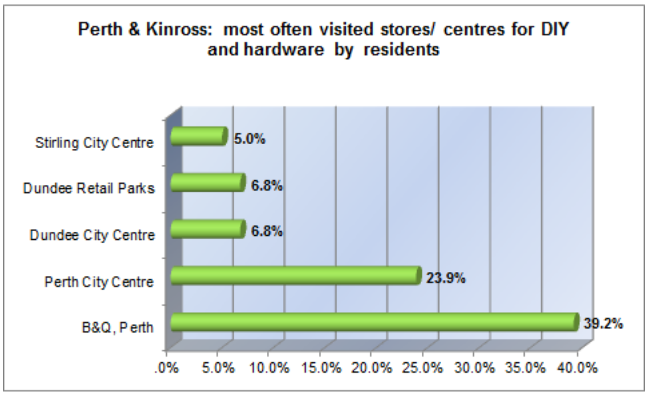
Comparison shopping patterns by types of goods, Perth & Kinross overall- household survey

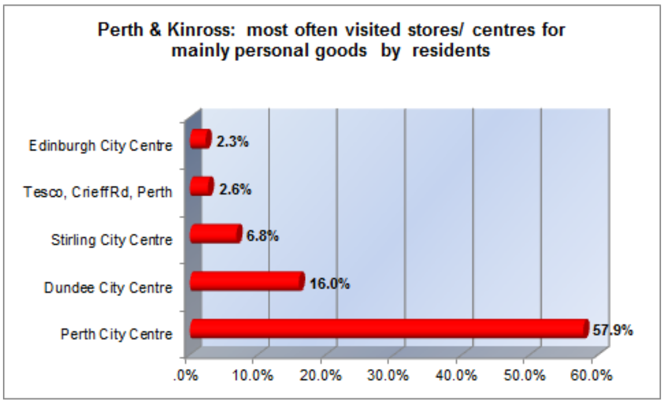
Goods categories graphs exclude don't knows, don't buy, varies, internet











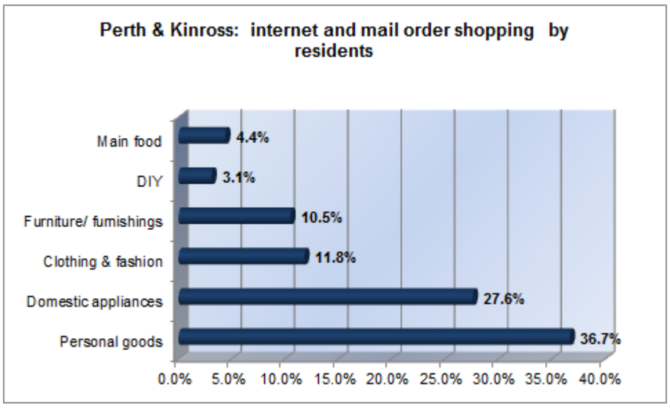


Table 9.4 Perth catchment (Zone1): comparison expenditure and turnover (in 2012 prices)				
	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		232.2	269.4	320.6
Add: inflows from rest of Perth & Kinross	36%	84.1	97.6	116.2
inflows from outside Perth & Kinross	16%	36.5	42.4	50.4
Less: outflows	-27%	-63.6	-73.8	-87.8
Retained expenditure (turnover)		289.3	335.6	399.4
Note Inflows and outflows from Appendix 7				

Table 9.5 Kinross catchment (Zone 2): comparison expenditure and turnover (in 2012 prices)				
	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		33.1	38.4	45.7
Add: inflows from rest of Perth & Kinross	0%	0.0	0.0	0.0
inflows from outside Perth & Kinross	2%	0.6	0.7	0.9
Less: outflows	-96%	-31.8	-36.9	-43.9
Retained expenditure (turnover)		1.9	2.2	2.6
Note Inflows and outflows from Appendix 7				

Table 9.6 Strathearn catchment (Zone3): comparison expenditure and turnover (in 2012 prices)				
	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		56.1	65.1	77.4
Add: inflows from rest of Perth & Kinross	1%	0.3	0.3	0.4
inflows from outside Perth & Kinross	17%	9.5	11.1	13.2
Less: outflows	-93%	-52.2	-60.6	-72.1
Retained expenditure (turnover)		13.7	15.9	18.9
Note Inflows and outflows from Appendix 7				

Table 9.7 Highland catchment (Zone4): comparison expenditure and turnover (in 2012 prices)				
	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		31.9	37.0	44.1
Add: inflows from rest of Perth & Kinross	2%	0.7	0.8	1.0
inflows from outside Perth & Kinross	39%	12.6	14.6	17.4
Less: outflows	-88%	-28.0	-32.5	-38.7
Retained expenditure (turnover)		17.2	19.9	23.7
Note Inflows and outflows from Appendix 7				

Table 9.8 Strathmore & The Glens catchment (Zone 5): comparison expenditure and turnover (in 2012 prices)				
	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		53.1	61.7	73.4
Add: inflows from rest of Perth & Kinross	0%	0.2	0.2	0.2
inflows from outside Perth & Kinross	9%	4.8	5.5	6.6
Less: outflows	-91%	-48.4	-56.1	-66.8
Retained expenditure (turnover)		9.7	11.3	13.4
Note Inflows and outflows from Appendix 7				

Table 9.9 Perth & Kinross: comparison expenditure and turnover (in 2012 prices)				
	%	2014 £million	2019 £million	2024 £million
Main catchment residents' expenditure potential		406.5	471.5	561.2
inflows from outside Perth & Kinross	16%	64.0	74.3	88.4
Less: outflows	-34%	-139.4	-161.7	-192.4
Retained expenditure (turnover)		331.8	384.9	458.1
Note Inflows and outflows from Appendix 7				

9.5 Comparison floorspace and turnover 2014

9.5.1 The current distribution of comparison floorspace in Perth & Kinross and in the five sub areas is shown in Table 9.10, based on the latest data provided by Goad (2013) and other sources, including Council data for most of the out of centre main supermarkets.

9.5.2 The current total of some 134,500 sq m gross compares to the total of 145,800 sq m gross in the 2011 Capacity Study. The main reasons for the reduction are fewer comparison shops generally, and the change of use of most of Eaglesgate to manufacturing.

9.5.3 Unlike convenience retailing, comparison retailing is not dominated by a few participants, so the concept of over/ under-trading has limited application for comparison retailing.

9.6 Planning consents

9.6.1 There are no outstanding major planning consents for comparison retail floorspace in Perth & Kinross.

Table 9.10
Perth & Kinross comparison retail floorspace and turnover 2014 (in 2012 prices)

	Floorspace sq m		Turnover	Turnover
	Gross	Net	£ per sq m	levels £million
PERTH				
City Centre	62,420	40,573	4,842	196.5
St Catherine's Retail Park	20,000	16,000	2,757	44.1
*Comparison floorspace in o/c supermarkets	8,092	4,863		32.0
B&Q Crieff Road	5,806	4,645	1,753	8.1
** Other Perth out of centre	5,040	3,528	2,421	8.5
Total	101,358	69,609		289.3
KINROSS	1,190	774	2,475	1.9
Sainsbury's total 2,900 sq m gross, 10% comp	290	174		
Town Centre shops	1,190	774		
Total	1,480	948	2,020	1.9
STRATHEARN				
Crieff	5,720	3,718		
Auchterarder (Assessor)	1,675	1,005		
Other Auchterarder (Gleneagles Furniture)- Assessor	633	506		
Eaglesgate (Pavers Shoes & Leading Lables)	600	480		
Total	8,628	5,709	2,400	13.7
HIGHLAND				
Pitlochry	5,430	3,530		
Aberfeldy 18 units	1,800	1,080		
House of Bruar total 5,723 sq m gross-70% comp	4,006	2,804		
Dunkeld 6 units	600	360		
Total	11,836	7,774	2,211	17.2
STRATHMORE & THE GLENS				
Blairgowrie	9,050	5,883		
Tesco total 4,480 sq m gross- 15% comp	672	403		
Coupar Angus 8 units	800	480		
Alyth 7 units	700	420		
Total	11,222	7,186	1,352	9.7
Total Perth & Kinross	**134,524**	**91,226**		**331.8**

Note
Retail floorspace derives from the same sources as convenience retailing (mostly Goad)
* this refers to the comparison floorspace in the Perth supermarkets- see calculations below (65% of the av in 2014 Retail Rankings)

ASDA, Dunkeld Road (7,833 sq m gross)-40% comp	3,133	1,880	7,471	14.0
Morrison, St C R Park (4,965 sq m gross)-10% comp	497	248	7,735	1.9
Tesco, Edinburgh Road (5,300 sq m gross)-25% comp	1,325	795	6,255	5.0
Tesco, Crieff Road (7,863 sq m gross)-35% comp	2,752	1,651	6,255	10.3
Lidl, Riggs Road total 1,407 sq m gross- 85% conv	211	158	2,645	0.4
Aldi, Glasgow Rd total 1,160 sq m gross- 85% conv	174	131	2,645	0.3
Total	8,092	4,863		32.0

** Other out of centre includes Highland Gateway Retail Park unit 1 (Tiso- 1,437 sq m) and unit 4 (Nevada Bobs- 603 sq m) and Christian Bookshop, Riggs Road 1,350 sq m gross
Plus nominal allowance for other comparison floorspace in Perth, outside the city centre (3,000 sq m gross)

10 Spare comparison expenditure to 2024

10.1 Introduction

10.1.1 This section provides estimates of the spare comparison retail expenditure capacity that could service new retail floorspace in Perth & Kinross, including each of the five sub areas. The forecasts of spare capacity are for the period 2014-19 and for the ten year period 2014-24, after allowing for the existing planning commitments.

10.2 Definition

10.2.1 The definition of spare capacity is described in section 8, which includes:

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

10.2.2 A range of spare capacity can be prepared from these components, showing a low and high estimate, *after deducting planning commitments*. The **low estimate** includes any over-trading (not relevant for comparison retailing) and the forecast growth in expenditure in the sub areas over the target periods. The **high estimate** also includes the potential to claw back leakage and attract new trade into the sub areas. Provision of a range of spare capacity normally reduces the need for sensitivity tests. However, the high estimate is really only relevant to Perth, as explained in the following paragraphs.

10.2.3 'Acceptable' levels of retail impact refer to the situation where new developments would not threaten the vitality and viability of established centres. This source of spare capacity is explained in section 8. By convention, this aspect is not usually embraced into capacity studies, because it is normally addressed by retail impact assessments in support of specific retail planning applications.

10.3 Spare comparison expenditure capacity

10.3.1 **Low estimates**- Tables 10.1 to 10.6 show the forecast spare comparison expenditure for each of the five sub areas and for the Council area in total, at the low end of the range. The spare capacity is entirely related to the forecast comparison expenditure growth to 2024. In other words, the low forecast is a situation where Perth and the other towns in the Council continue to 'hold their own' in the retention of comparison retail expenditure. Therefore much will depend on maintaining and improving the range and quality of shopping against competition from major centres beyond the Council area.

10.3.2 The concentration of spare comparison expenditure capacity is in Perth, with capacity to support relatively minor retail developments in the other sub areas.

10.3.3 **High estimate**- For estimates at the high end of the range to apply, there would have to be potential for clawing back comparison expenditure and attracting new trade. This is relevant to Perth, but not really to the small towns, because of the market forces in comparison retailing, where the tendency is to gravitate towards the largest centres.

10.3.4 Table 10.1 shows the high estimate for Perth, which in fact includes very modest potential to claw back leakage or attract new trade.

10.3.5 Overall, the forecast spare capacity over the next ten years would potentially support substantial additions to the comparison floorspace in the city centre, for example, with small scale additions in the other towns. Much will depend on further investment in retail property provision, though.

Table 10.1 **Perth catchment (Zone1): spare comparison expenditure capacity** **(in 2012 prices)**		
Components of spare capacity *(there are no planning consents to be deducted)*	2014-19 £million	2014-24 £million
(a) **Low estimate**- retained expenditure growth (turnover growth in Table 9.4- from 2014-19 and from 2014-24)	**46.3**	**110.1**
(b) Add: potential to claw back up to, say 10% of outflows (Table 9.4- 2019 & 2024) Add: potential to increase inflows by up to, say 5% (Table 9.4- 2019 & 2024)	7.4 7.0	8.8 8.3
High estimate: (a+b)	**60.7**	**127.2**
*Equivalent net comparison floorspace (rounded to the nearest 100 sq m) ***Low*** ***High***	sq m net *9,600* *12,600*	sq m net *22,900* *26,500*
Note (figures are rounded) Equivalent net floorspace @ £4,800 per sq m		

Table 10.2 **Kinross catchment (Zone2): forecast spare comparison expenditure capacity** **(in 2012 prices)**		
Components of spare capacity *(there are no planning consents to be deducted)*	2014-19 £million	2014-24 £million
Retained expenditure growth (turnover growth in Table 9.5- from 2014-19 and from 2014-24)		
Total spare capacity	**0.3**	**0.7**
Equivalent net floorspace @ £2,500 per sq m	sq m net *100*	sq m net *300*

Table 10.3 **Strathearn catchment (Zone3): forecast spare comparison expenditure capacity** **(in 2012 prices)**		
Components of spare capacity *(there are no planning consents to be deducted)*	2014-19 £million	2014-24 £million
Retained expenditure growth (turnover growth in Table 9.5- from 2014-19 and from 2014-24)		
Total spare capacity	**2.2**	**5.2**
Equivalent net floorspace @ £2,500 per sq m	sq m net *900*	sq m net *2,100*

Table 10.4 **Highland catchment (Zone 4): forecast spare comparison expenditure capacity** **(in 2012 prices)**		
Components of spare capacity *(there are no planning consents to be deducted)*	2014-19 £million	2014-24 £million
Retained expenditure growth (turnover growth in Table 9.5- from 2014-19 and from 2014-24)		
Total spare capacity	**2.8**	**6.5**
Equivalent net floorspace @ £2,500 per sq m	sq m net *1,100*	sq m net *2,600*

Table 10.5 **Strathmore & Glens catchment (Zone 5): forecast spare comparison expenditure capacity** **(in 2012 prices)**		
Components of spare capacity *(there are no planning consents to be deducted)*	2014-19 £million	2014-24 £million
Retained expenditure growth (turnover growth in Table 9.5- from 2014-19 and from 2014-24)		
Total spare capacity	**1.6**	**3.7**
Equivalent net floorspace @ £2,500 per sq m	sq m net *600*	sq m net *1,500*

Table 10.6 **Perth & Kinross total: forecast spare comparison expenditure capacity** **(in 2012 prices)**		
Components of spare capacity *(there are no planning consents to be deducted)*	2014-19 £million	2014-24 £million
(a) **Low estimate**- retained expenditure growth (turnover growth in Table 9.9- from 2014-19 and from 2014-24)	**53.1**	**126.3**
High estimate: includes potential claw back of leakage/ increased inflows- Relates to Perth only- Table 8.1	**60.7**	**143.4**
*Equivalent net comparison floorspace (rounded to the nearest 100 sq m) ***Low*** ***High***	sq m net *12,300* *15,300*	sq m net *29,400* *33,000*
Note (figures are rounded) Equivalent net floorspace @ £4,800 per sq m for Perth and £2,500 elsewhere		

11 Conclusions

11.1 The town centres

11.1.1 The slow economic recovery and limited levels of investment are likely to affect the retail market for some time into the future. Retailing remains a crucial economic component of town centre activities. Growth in internet spending and the increasing concentration of demand by major multiples too locate mainly in the largest destinations is having a considerable effect on smaller town centres. Success for smaller towns and cities will depend heavily on independent operators in the future, combined with what is on offer.

11.1.2 Therefore it is important for town centres to try and differentiate themselves to attract people into them for shopping, services, leisure and other activities. A vibrant town centre is much more likely to attract the necessary investment to remain competitive.

11.1.3 **Perth-** has achieved a steady track record of being able to offer a distinctive quality of retail offer, mostly through its independent sector combined with investment in the town centre environment to maintain its attraction to locals and visitors alike. It also has a wide range of leisure related offer, making it an attractive destination.

11.1.4 There is nothing in this study that suggests the need for any radical change of planning policy for Perth city centre. The main issues include: maintaining and improving the city centre environment, promoting the profile of Perth city centre as a destination, encouraging developments which support additional quality retailing and leisure facilities, and encouraging further development of the evening economy. All these actions would be consistent with the planning policies which support new retail and leisure development in the city centre as a priority over other locations.

11.1.5 The development of improved linkages to St Catherine's Retail Park is important. Further relaxations on restrictions on the range of goods for sale need to be considered with care, in order to focus new development in the city centre as the priority.

11.1.6 Under planning policies, the city centre, including the upgraded St John's Centre and other central locations, is also the priority location for large floorspace retail operator requirements. Examples include Primark and H&M. Therefore careful consideration of the city centre opportunities needs to be given first, before possible location in St Catherine's with associated relaxation of restrictions.

11.1.7 **Crieff-** serves as an important service centre for the local population and as a visitor destination, mainly for the surrounding attractions in Strathearn. There is a general need to continue with environmental improvements in the town centre, including improved parking. Primarily though, the priority is to promote the town centre strongly as a visitor destination, including improvements to the range of retail offer, plus opportunities for increasing the evening economy. The nearby Crieff Hydro is a supportive opportunity for promoting Crieff, with potentially more spin off benefits to the town centre. Development of the new Tesco store in Crieff will greatly improve the convenience retail offer.

11.1.8 **Kinross-** will continue to serve as a commuter town because of its good accessibility. There is a need to continue to promote improvements to the town centre environment, over and above the recent funding for public realm improvements. The shopping is limited and that is likely to remain the case in view of its role. The convenience shopping is good, because of Sainsbury's nearby. Local sports and leisure facilities are also good. Increased marketing would assist with raising the profile of Kinross for visitors and assist with boosting the evening economy.

11.2 Spare retail capacity

11.2.1 The forecasts of spare retail expenditure capacity over the next five and ten years are supportive of additional floorspace, mostly in Perth.

11.2.2 For convenience retailing, limited additional floorspace could be supported by the forecast spare capacity in Perth, over and above the current consents. However, there is potential for more convenience floorspace through servicing by trade diversion on existing stores, which is not part of the capacity study. Planning applications for larger foodstores would have to be supported by a credible case that the vitality and viability of established centres would not be threatened.

11.2.3 In the small towns, minor additions could be supported, over and above the existing consents.

11.2.4 For comparison retailing, the forecast spare capacity is substantial and it is largely based on the projected growth in comparison retail expenditure in the UK by economists. Most of the potential spare expenditure relates to Perth, especially in relation to the city centre. Minor developments would be supported in the smaller towns.

11.2.5 It is important to recognise that capture of this forecast spare expenditure will be highly dependent on the retail market. The 'potential' nature of the capacity forecasts cannot be over-stressed. With increasing concentration of multiple retailer demand in the major cities, Perth city centre in particular, will need to remain highly competitive to retain the forecast growth in comparison expenditure.

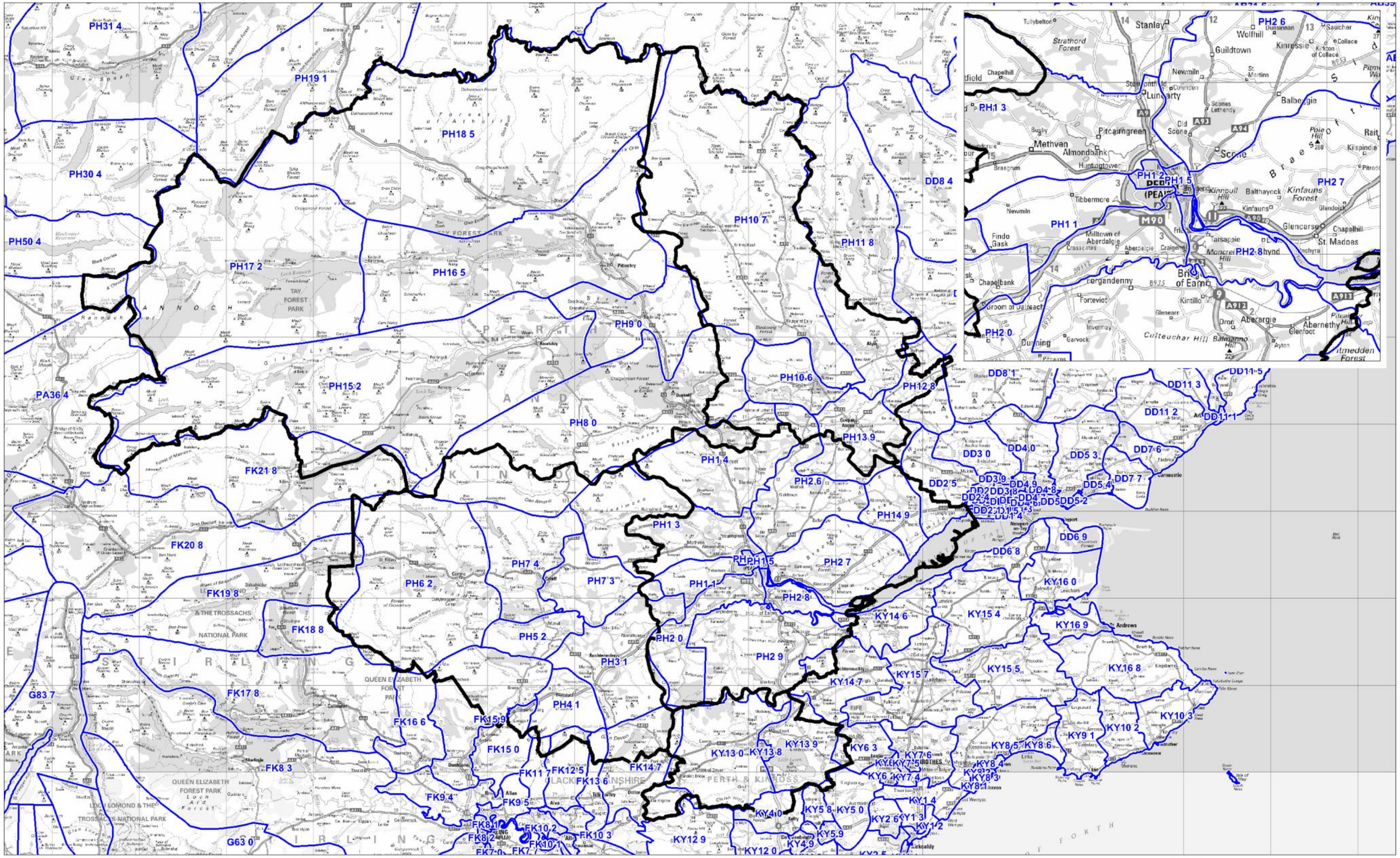
11.2.6 Nevertheless, the study findings indicate that the forecast levels of potential comparison expenditure capacity are most supportive of further investment in Perth city centre. For example, the forecasts of potential spare capacity in section 10, could support another shopping centre on the scale of the St John's Centre (c 10,000 sq m gross) over the next five years.

Appendix 1

Postcode sectors in the 5 sub areas of Perth & Kinross

Perth & Kinross sub areas- postcode sector populations and the household survey sample quotas						
Sub area	**Main town catchments**	**Postcode Sector**	**Population 2011 Census**	**Population** %	**Sample** in proportion	**Sample Actual**
Perth Area	Perth					
Zone 1		DD2-5				
		PH1-1				
		PH1-2				
		PH1-3				
		PH1-4				
		PH1-5				
		PH14-9				
		PH2-0				
		PH2-6				
		PH2-7				
		PH2-8				
		PH2-9				
Total			**83,783**	57%	714	**600**
Kinross Area	Kinross	KY13-0				
Zone 2		KY13-7				
		KY13-8				
		KY13-9				
		KY4-0				
		KY5-0				
		KY6-3				
		KY14-6				
		KY14-7				
Total			**11,940**	8%	102	**102**
Strathearn Area						
Zone 3						
Zone 3a	Crieff	PH6-2				
Zone 3a	Crieff	PH7-3				
Zone 3a	Crieff	PH7-4				
Zone 3a	Crieff	PH5-2				
Zone 3a	Crieff	FK15-9				
Zone 3a	Crieff	FK21-8				
Zone 3a	Crieff	FK19-8				
Zone 3a	*Sub total Crieff*		*13,378*	*9%*	*114*	*140*
Zone 3b	Auchterarder	FK15-0	*314*			
Zone 3b	Auchterarder	PH3-1	*5,726*			
Zone 3b	Auchterarder	PH4-1	*820*			
Zone 3b	*Sub total Auchterarder*		*6,860*	*5%*	*58*	*100*
Total			**20,238**	14%	173	**240**
Highland Area						
Zone 4						
Zone 4a	Aberfeldy	PH15-2	*3,502*	*2%*	*30*	*50*
Zone 4b	Pitlochry	PH16-5				
Zone 4b	Pitlochry	PH17-2				
Zone 4b	Pitlochry	PH18-5				
Zone 4b	Pitlochry	PH8-0				
Zone 4b	Pitlochry	PH9-0				
Zone 4b	*Sub total Pitlochry*		*11,516*	*8%*	*98*	*101*
Total			**11,516**	8%	98	**151**
Strathmore	Blairgowrie	PH10-6				
and the Glens	Blairgowrie	PH10-7				
Zone 5	Blairgowrie	PH11-8				
	Blairgowrie	PH13-9				
	Blairgowrie	PH12-8				
	Blairgowrie	DD8-1				
Total			**19,175**	13%	163	**159**
Total Perth & Kinross Council area			**146,652**	**100%**	**1,250**	**1,252**

Source:
Scotland's Census 2011 online- usually resident population by postcode and postcode sector geography
Note that,in some cases, the post code sectors in this table extend into other local authority areas, but only the population in the part within Perth & Kinross Council area is included in the above figures.
The sample sizes have been selected to enhance representation in the smallest sub areas



Perth & Kinross Council Area (inc. Postal Sectors)

24/02/2011

Pitney Bowes Business Insight
Minton Place, Victoria Street, Windsor, Berkshire, SL4 1EG
Tel: 01753 848200
Web: www.mapinfo.co.uk

Appendix 2

Household survey questions

Q01	Where did you last do your MAIN FOOD shopping for the household?
Q02	Which internet retailer did you use on that trip? Those who said Internet at Q01
Q03	Where did you last go the time before that to do your MAIN FOOD shopping? Was it the same or different, please specify
Q04	Which internet retailer did you use on that trip? Those who said Internet at Q03
Q05	Where did you last go to do small, day-to-day TOP-UP food shopping?
Q06	Where do you normally do your small, day-to-day top up food shopping?
Q07	On average, how often do you do your TOP UP food shopping? Those who do top up food shopping at Q05
Q08	Could you tell me what other things you usually combine with doing your MAIN food shopping?
Q09	Where do you visit most often to buy clothes, shoes and other fashion items?
Q10	Where do you visit most often to buy furniture, floor coverings and soft furnishings?
Q11	Where do you visit most often to buy large domestic electrical appliances such as fridges, washing machines, vacuum cleaners etc?
Q12	Where do you visit most often to buy DIY and hardware?
Q13	Where do you visit most often to buy other items of a mainly personal nature, such as sports goods, jewellery, books, toys, CD's, computers, mobiles, cameras, electronic games etc?
Q14	When visiting St Catherine's Retail Park, do you visit the City Centre at the same time? Those who mentioned St Catherine's Retail Park at Q09-Q13
	**** Questions about the town centres were put to respondents from the sub area catchments in which the town is located. *Perth City Centre- from Zone 1, Kinross TC- from Zone 2, Crieff TC- from Zone 3a, Auchterarder TC- fom Zone 3b, Aberfeldy TC- from Zone 4a, Pitlochry TC- from Zone 4b, Blairgowrie TC- from Zone 5. See sample quotas in Appendix 1*
Q15	Thinking about **** Town Centre, on average, how often do you visit it?
Q16	How do you normally travel to **** Town Centre?
Q17	What typically, are your main reasons for visiting ****Town Centre - what range of things do you do when you get there?
Q18	On average, how long do you normally spend in **** Town Centre when you visit?
Q19	What do you like most about **** Town Centre for shopping and as a place to visit generally?
Q20	What do you dislike most about *** Town Centre for shopping and as a place to visit generally?
Q21	Overall, how do you rate **** Town Centre on the following aspects, - As 'Good', 'Average' or 'Poor' *(see table in section 5 for list of aspects)*
Q22	What improvements to **** Town Centre would make you visit there more often?
Q23	On average, how often do you visit **** Town Centre in the evenings i.e. after 6pm?
Q24	Do you undertake any of the following leisure related activities when you visit **** Town Centre in the evenings? *(see table in section 5 for list of activities)*
Q25	What would make you visit **** Town Centre more often in the evenings?
Q26	Thinking about Perth City Centre briefly, on average, how often do you visit it? Those not living in Perth
Q27	What improvements to Perth City Centre would make you visit there more often? Those not living in Perth
GEN	Gender of respondent.
AGE	Which of the following age ranges do you fall in to?
PC	Postcode sector of home address

Appendix 3

Retailer/business survey questions

Q01	Please indicate which of the following best describes your business?
Q02	Is your business a national multiple/ regional chain or an independent operator?
Q03	How long has your business been operating in this area?
Q04	Generally speaking, what is your feeling about the likely sales performance of your business over the next two years?
Q05	From the reasons listed below, please indicate the main 3 reasons for your outlook on future sales performance stated at Q04: Those who answered Lower sales" at Q04"
Q05	From the reasons listed below, please indicate the main 3 reasons for your outlook on future sales performance stated at Q04: Those who answered No change in sales" at Q04"
Q05	From the reasons listed below, please indicate the main 3 reasons for your outlook on future sales performance stated at Q04: Those who answered Increasing sales" at Q04"
Q06	Is your business actively considering any of the following over the next 5 years?
Q07	Thinking about tourists, how important is tourist spending to the turnover of your business?
Q08	Please could you indicate the approximate proportion of your turnover which relates to tourist spending? Those who view tourist spend as important to the turnover of their business at Q07
Q09	Overall, how do you rate the Town Centre on the following aspects? Rate as good/ average/ poor *(see table in section 5 for list of aspects)*
Q10	What improvements, (which you think would most benefit local businesses and retailers in general), would you like to see in the Town Centre? Rate as essential/ quite important/ not important *(see table in section 5 for list of improvements)*
Q11	Please make any additional comments:

Appendix 4

Convenience shopping patterns- household survey

Main food shopping destinations- based on last visited store/centre and the one prior to that
Combined Q1 and Q3 from the questionaire

	Origin Zone 1 Perth	Zone 2 Kinross	Zone 3 Strathearn	Zone 4 Highland	Zone 5 Strathmore	Total
Destination						
Zone 1	85%	22%	31%	66%	22%	63%
Zone 2	1%	42%	1%	0%	0%	4%
Zone 3	0%	0%	14%	0%	0%	2%
Zone 4	1%	0%	0%	31%	1%	3%
Zone 5	0%	0%	0%	1%	58%	8%
Outside study area	13%	36%	54%	1%	19%	20%
Total	100%	100%	100%	100%	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order

Top-up food shopping destinations- based on last visited store/centre and the one prior to that
Q5 from the questionaire

	Origin Zone 1 Perth	Zone 2 Kinross	Zone 3 Strathearn	Zone 4 Highland	Zone 5 Strathmore	Total
Destination						
Zone 1	84%	12%	5%	8%	9%	47%
Zone 2	1%	59%	1%	1%	0%	6%
Zone 3	2%	8%	45%	0%	0%	9%
Zone 4	1%	0%	0%	90%	1%	8%
Zone 5	1%	1%	0%	1%	85%	13%
Outside study area	11%	21%	49%	1%	5%	17%
Total	100%	100%	100%	100%	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order and those w ho said that they don't do top-up shopping

All convenience shopping patterns- based on survey findings for main food and top-up shopping
weighted and combined

	Origin Zone 1 Perth	Zone 2 Kinross	Zone 3 Strathearn	Zone 4 Highland	Zone 5 Strathmore	Total
Destination						
Zone 1	85%	20%	26%	55%	20%	60%
Zone 2	1%	45%	1%	0%	0%	4%
Zone 3	0%	2%	20%	0%	0%	3%
Zone 4	1%	0%	0%	43%	1%	4%
Zone 5	0%	0%	0%	1%	63%	9%
Outside study area	12%	33%	53%	1%	16%	20%
Total	100%	100%	100%	100%	100%	100%

Note
The combined shopping data is w eighted at 80% main food and 20% top-up shopping.
The proportion of top-up shopping is an estimate from other studies, commonly at 20%-25% of all convenience shopping, w hile taking account of 20% of respondents in the survey w ho said that they did not do top-up shopping.

Appendix 5

Convenience expenditure inflows and outflows, including visitor spending

	Visitor Expenditure on shopping in 2012 STEAM	Convenience	Comparison
		37%	63%
	£million	£million	£million
City of Perth	9.83	3.6	6.2
Kinross	1.00	0.4	0.6
Strathearn	11.3	4.2	7.1
Highland	19.99	7.4	12.6
Strathmore & Glens	7.54	2.8	4.8
Total	49.66	18.4	31.3

Note: convenience/ comparison split based on visitor research in Highland Council area- R MacLean

Retail expenditure inflows to Perth & Kinross from Stirling (Stirling Retail Study Update 2009)
Roger Tym & Partners
(from working papers on market shares)

	£million
Convenience spend by Stirling area residents:	
in Perth	1.47
*in rest of Perth & Kinross	1.26
Comparison spend by Stirling area residents:	
in Perth	8.41
*in rest of Perth & Kinross	2.42

* estimated by R MacLean to be mainly in Strathearn

Retail expenditure inflows to Perth & Kinross from Dundee and Angus
(TAYplan Retail Framework, 2009- Report)- Roderick MacLean Associates Ltd

(interpretation from Colliers Dundee Retail Study 2006)

	£million
Comparison spend by residents of these areas in Perth:	11.7
Convenience spend in Perth (notional allowance by R MacLean)	2.0

Retail expenditure inflows to Perth & Kinross from Fife
(based on NEMS household survey 2009- roughly 6% of E Fife respondents identified Perth for comparison shopping, from a range of categories).

	£million
Comparison spend by residents of these areas in Perth: (from Fife Retail Capacity Study 2013, Table 5.2 for East Fife, with 6% of £170.3 million applied)	10.2
Convenience spend by residents of these areas in Perth: (from Fife Retail Capacity Study 2013, Table 2.2 for East Fife, with 5% of £137 million applied)	6.9

Convenience expenditure inflows and outflows

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5		
Residents' expenditure potential by Zone 2014	£ million 178.3	£ million 25.4	£ million 43.1	£ million 24.5	£ million 40.8		
	Origin- inflows from:					Total inflow	
Destination	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	from rest of P & K £ million	from outside P& K £ million
Perth		20%	26%	55%	20%	37.6	16.8
Kinross	1%		1%	0%	0%	1.9	0.4
Strathearn	0%	2%		0%	0%	1.1	5.4
Highland	1%	0%	0%		1%	2.0	7.4
Strathmore & The Glens	0%	0%	0%	1%		0.8	2.8
From outside Perth & Kinross							32.8

	Origin					
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Total P & K**
Retained expenditure by zone	85%	45%	20%	43%	63%	80%
Outflows	15%	55%	80%	57%	37%	20%

Appendix 6

Comparison expenditure patterns- household survey

Q9 Most visited centre for clothes, shoes and other fashion items						
	Origin					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
	Perth	Kinross	Strathearn	Highland	Strathmore	
Destination						
Zone 1	74%	54%	37%	88%	53%	65%
Zone 2	0%	6%	0%	0%	0%	0%
Zone 3	0%	0%	5%	0%	0%	1%
Zone 4	0%	2%	0%	3%	0%	0%
Zone 5	0%	0%	0%	0%	4%	1%
Outside study area	26%	38%	58%	10%	43%	33%
Total	100%	100%	100%	100%	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order

Q10 Most visited centre for furniture, floorcoverings and soft furnishings						
	Origin					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
	Perth	Kinross	Strathearn	Highland	Strathmore	
Destination						
Zone 1	58%	35%	30%	55%	27%	48%
Zone 2	0%	1%	0%	0%	0%	0%
Zone 3	0%	0%	6%	0%	0%	1%
Zone 4	0%	1%	0%	4%	0%	0%
Zone 5	0%	0%	0%	0%	6%	1%
Outside study area	42%	62%	64%	40%	67%	50%
Total	100%	100%	100%	100%	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order

Q11 Most visited centre for large domestic appliances, such as washing machines etc						
	Origin					
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Total
	Perth	Kinross	Strathearn	Highland	Strathmore	
Destination						
Zone 1	77%	51%	39%	72%	35%	64%
Zone 2	0%	1%	1%	0%	0%	0%
Zone 3	0%	0%	8%	0%	0%	1%
Zone 4	0%	0%	0%	16%	0%	1%
Zone 5	1%	0%	0%	1%	19%	3%
Outside study area	22%	48%	52%	12%	46%	31%
Total	100%	100%	100%	100%	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order

Q12 Most visited centre for DIY and hardware

	Origin Zone 1 Perth	Zone 2 Kinross	Zone 3 Strathearn	Zone 4 Highland	Zone 5 Strathmore	Total
Destination						
Zone 1	85%	53%	33%	86%	39%	69%
Zone 2	0%	5%	0%	0%	0%	0%
Zone 3	0%	0%	14%	0%	0%	2%
Zone 4	0%	0%	0%	13%	0%	1%
Zone 5	0%	0%	0%	0%	23%	3%
Outside study area	15%	43%	53%	1%	38%	25%
Total	100%	100%	100%	100%	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order

Q13 Most visited centre for goods of a mainly personal nature

	Origin Zone 1 Perth	Zone 2 Kinross	Zone 3 Strathearn	Zone 4 Highland	Zone 5 Strathmore	Total
Destination						
Zone 1	75%	50%	35%	76%	44%	63%
Zone 2	0%	4%	0%	0%	0%	0%
Zone 3	0%	0%	8%	0%	0%	1%
Zone 4	0%	0%	0%	20%	0%	2%
Zone 5	0%	0%	0%	0%	11%	2%
Outside study area	25%	47%	57%	4%	45%	32%
Total	100%	100%	100%	100%	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order

All comparison shopping patterns based on the responses to Q9 to Q13, weighted and combined

	Origin Zone 1 Perth	Zone 2 Kinross	Zone 3 Strathearn	Zone 4 Highland	Zone 5 Strathmore	Total
Destination						
Zone 1	73%	50%	35%	77%	44%	62%
Zone 2	0%	4%	0%	0%	0%	0%
Zone 3	0%	0%	7%	0%	0%	1%
Zone 4	0%	1%	0%	12%	0%	1%
Zone 5	0%	0%	0%	0%	9%	1%
Outside study area	27%	46%	58%	11%	47%	34%
Total	100%	100%	100%	100%	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, varies, internet and mail order

Weighting - *from the Pitney Bowes expenditure per capita data for Perth & Kinross 2012*

All comparison shopping	£	%
Clothing, shoes and fashion	932	30%
Furniture, floorcoverings & furnishings	384	13%
Large domestic appliances	80	3%
DIY and hardw are	114	4%
Personal goods	1,548	51%
Total comparison expenditure per capita	3,058	100%

Appendix 7

Comparison expenditure inflows and outflows, including visitor spending

Visitor spending and other inflows, as set out in Appendix 5, for ease of reference

	Visitor Expenditure on shopping in 2012 STEAM £million	Convenience 37% £million	Comparison 63% £million
City of Perth	9.83	3.6	6.2
Kinross	1.00	0.4	0.6
Strathearn	11.3	4.2	7.1
Highland	19.99	7.4	12.6
Strathmore & Glens	7.54	2.8	4.8
Total	49.66	18.4	31.3

Note: convenience/ comparison split based on visitor research in Highland Council area- R MacLean

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	£million
Convenience spend by Stirling area residents:	
in Perth	1.47
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in Perth	8.41
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	£million
Comparison spend by residents of these areas in Perth:	11.7
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Retail expenditure inflows to Perth & Kinross from Fife
(based on NEMS household survey 2009- roughly 6% of E Fife respondents identified Perth for comparison shopping, from a range of categories).

	£million
Comparison spend by residents of these areas in Perth: (from Fife Retail Capacity Study 2013, Table 5.2 for East Fife, with 6% of £170.3 million applied)	10.2
Convenience spend by residents of these areas in Perth: (from Fife Retail Capacity Study 2013, Table 2.2 for East Fife, with 5% of £137 million applied)	6.9

Comparison expenditure inflows and outflows

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5		
Residents' expenditure potential	£ million	£ million	£ million	£ million	£ million		
by Zone 2014	235.9	33.6	57.0	32.4	54.0		
	Origin- inflows from:					Total inflow	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	from rest of P & K	from outside P& K
Destination						£ million	£ million
Perth		50%	35%	77%	44%	85.5	36.5
Kinross	0%		0%	0%	0%	0.0	0.6
Strathearn	0%	0%		0%	0%	0.3	9.5
Highland	0%	1%	0%		0%	0.7	12.6
Strathmore & The Glens	0%	0%	0%	0%		0.2	4.8
From outside Perth & Kinross							64.0

	Zone 1	Origin Zone 2	Zone 3	Zone 4	Zone 5	Total P & K
Retained expenditure by zone	73%	4%	7%	12%	9%	66%
Outflows	27%	96%	93%	88%	91%	34%

Appendix 8

List of comparison retailers in St Catherine's Retail Park

St Catherine's Retail Park- list of comparison retailers				
	Floorspace sq m		Turnover	Turnover
	gross	net	ratio £/sq m	£million
Tile Giant	580	464	1,156	0.5
Wickes	3,440	2,752	2,398	6.6
Wickes	2,190	1,752	2,398	4.2
B&M Bargains	910	728	4,520	3.3
Pets At Home	1,070	856	2,596	2.2
PC World	1,490	1,192	6,287	7.5
Dunelm Mill	2,870	2,296	2,017	4.6
Carpetright	950	760	1,193	0.9
Halfords (non retail)				
Homebase	3,540	2,832	1,215	3.4
Currys	970	776	6,287	4.9
T K Maxx	1,990	1,592	3,711	5.9
Total	20,000	16,000		44.1

Sources:

Goad Survey 2013

Company average turnover ratios applied, based on 2014 Retail Rankings