c p w planning

THE RETAIL GROUP

Perth & Kinross
City and Town Centre
Retail Study

February 2023

prepared for

Perth & Kinross Council

Contents

Executive Summary

The Retail Group and CPW Planning have been commissioned by PKC to prepare this City and Town Centre Retail Study. It provides the evidence base to assist PKC with its work on the LDP review and related economic development frameworks; and supports the development management function of the local planning authority.

It also informs the regular performance monitoring of the city and town centres in the Perth and Kinross area.

The Study is focused on the following centres:

- Perth City Centre
- Aberfeldy Town Centre
- Alyth Town Centre
- Auchterarder Town Centre
- Blairgowrie Town Centre
- Coupar Angus Town Centre
- Crieff Town Centre
- Dunkeld & Birnam Town Centre
- Kinross Town Centre
- Pitlochry Town Centre
- Perth’s Neighbourhood Centres

The Study has been prepared in the context of significant changes and events since the 2016 Study. These include Brexit, changing economic conditions, the Covid-19 pandemic, the continued growth of online shopping, widespread retailer closures, and (responding in part to such challenges) the newly adopted Fourth National Planning Framework for Scotland (‘Adopted NPF4’) and other potential planning reforms in relation to permitted development rights.

Retail & Leisure Market Trends Overview

As section 3 highlights, there is a need to move on from retail-led city and town centres towards more multi-purpose destinations in their offer, use and experience. Online shopping and widespread retailer closures continue to have significant implications for the vitality and viability of many centres, while the pandemic has further resulted in new shopping and lifestyle habits, new ways of ‘agile’ working, as well as potentially permanent impacts on the leisure and hospitality sectors.

All centres are likely to face growing pressures and potentially business closures due to the cost of living crisis, labour shortages and supply chain issues. However, future performance and recovery will much depend on how each centre adapts to future changes and remains relevant and attractive to shoppers and other users.

City and Town Centre Reviews & Qualitative Needs

Section 4 provides in-depth reviews of the health and function of the city and town centres including their qualitative needs for improvement. These are based on detailed site visits and place reviews, the results of household and business surveys and, where available, the findings and outputs of Community Action Plans (CAPs) and ‘Charettes’.

Perth City Centre

The health of Perth City Centre includes a number of challenges, which are similar to many places of similar stature across the country. Whilst many parts of the city centre are in a good place and it has many positive indicators, there are a number of aspects that will need to be addressed to improve the vitality of the centre. The appearance and number of large visible vacant units in the core pedestrianised part of the city centre, as a result of national failures / strategic trading decisions, is one aspect. Similarly, the clusters of vacant units on a number of other of the main city centre streets also provide indicators that there needs to be pro-active work to fill / repurpose historic retail units, and / or reduce the number of designated retail units.

However, there are many positive aspects to build on; businesses are generally satisfied with their own performance, even if sales are down year on year. Whilst post covid visit frequency is down, over half of residents are visiting at the same rate as pre Covid. Some businesses report increased transaction values.

Perth has plenty of opportunities to improve its health and vitality; some of the initiatives already completed, planned and underway (Perth People and Place, Perth Museum, UNESCO recognition, Perth City Development Plan and Vacant Property Development initiatives) are having a positive impact and recognition with visitors and businesses. These need to be built on and expanded. The numbers of strengths and opportunities identified in the Study significantly outweigh the weaknesses and issues. Many of the strengths are physical and long term. This indicates that whilst it might be challenging now for Perth, the outlook (with some pro-active initiatives) is a lot healthier, providing opportunities to improve are taken and implemented. Perth City Centre continues to have the qualitative potential to expand its offer and customer appeal, through adding to its retail, catering, leisure and service offers, and adding more variety to its overall city centre experience. Whilst there has been much improvement to the experiential factors and public realm across the city core, this does need to continue into more of the adjacent and adjoining areas.

Aberfeldy Town Centre

Aberfeldy would appear to be in a good position and in reasonable health when considering the findings of the household survey, business survey and objective place review. Businesses are broadly satisfied with it as a place to be doing business. Customers like to use it and use it for a variety of reasons. The strengths and opportunities clearly outweigh the weaknesses and threats.

Whilst the offer is improving, there are no obvious large scale development sites that would trigger a significant change in the mix, offer and uses of the town. The large hotel in the middle of the town occupies a large plot, but it only needs a makeover and tidy up, not replacing. Change to the mix and offer, and improvement will happen as units become available and this should be encouraged, whilst maintaining the broad mix of offer and reasons to visit.

Alyth Town Centre

Overall, it would appear from the findings of the place review that Alyth is in a good state of health and vitality. Although the vacancy rate sounds high, these are mostly on the periphery of the offer. The core reasons to use the town centre (service offer, Co-op, fish & chip shop, specialist comparison goods stores) are generally strong independents and seem to be trading well.

There are no obvious large development sites that need delivering or bringing forward in the town centre. The improvements to the core area's public realm need extending to the wider town centre to embrace and improve the opportunity of the outer areas.

Auchterarder Town Centre

Auchterarder is undoubtedly in good health. Vacancies are low, many independent retailers (especially the boutique stores) are best in class. Businesses are trading well and are optimistic about the future. For sure there are some minor improvements that could be made to improve the customer experience (more crossing points, better sense of arrival, more seating etc) but fundamentally, the town centre is in sync with its customers and in a good shape as a result.

There are no vacant, stalled or priority development sites that need priority attention. Continued and gradual evolution of the mix and offer should be supported.

Blairgowrie Town Centre

Overall, it would appear from the findings of the place review, business survey and household survey that Blairgowrie is in a reasonable state of health. Although the offer looks weak in parts because of the number of vacant units, charity shops and temporary tenants, fundamentally it remains a strong offer because of the wide choice of comparison goods specialists and the positive customer visit pattern.

There are no large development sites that need bringing forward in the town centre, although several smaller units need investment and upgrading. Blairgowrie town centre has many hidden assets, including much of its retail core. Improving the visibility and promotion of these assets will go a long way to improving the outlook for the town.

Coupar Angus Town Centre

Coupar Angus Town Centre appears to be struggling at the moment and in decline. Although we did not capture any robust empirical data in the two surveys, it is clear from the high vacancy rate, poor retail experience and levels of existing motivation that businesses in the town centre are finding times tough. The current draft CAP does provide strong actions to improve the centre and is the basis for a plan of action.

There are no key development sites in the town centre that need bringing forward, as the two key ones (former Royal Hotel, Town Hall and site opposite on George Street) have recently been improved. There is however the old Strathmore Hotel adjacent to the town centre on the other side of the A94 which seems to be in quite a perilous and poor-quality condition. It is having a negative impact on the trading part of the centre, as it projects a visible 'closed and failing' impression. Coupar Angus needs to implement the detailed plan to improve its fortunes, with a step change in approach.

Crieff Town Centre

Assessing the health and vitality for Crieff is quite tricky. On the one hand the town centre appeared to be clearly on the 'up' five years ago, extending its offer, improving the customer experience and adding more layers of appeal. Crieff has many strong attributes in place, which will underpin the future positive performance.

Looking at town centre and the evidence today, it seems to have gone through a considerable downturn over the last 3 years, presumably accelerated by the pandemic and national trends. It seems to have been unlucky in so much that several national retailers have rationalised their store networks and / or have stopped trading and closed their units in Crieff. As a result, the town centre looks poor, in decline and facing a considerable challenge to get back on its feet.

Despite the recent issues, there remain lots of reasons to be positive about Crieff Town Centre going forward. Its environment, history and heritage, location, existing assets and anchors nearby and around it in the area remain positive. We would therefore conclude that if nothing is done, the town centre is likely to further decline. If on the other hand a robust, growth focussed action plan (to include aspects identified in the recent CAP) could be developed and implemented, then its potential future could be a strong and positive one.

Dunkeld Town Centre

Dunkeld is clearly in good position and health when considering the findings of the household survey, business survey and objective place review. Businesses are very satisfied with it as a place to be doing business. Tourist visitors are an important customer group and clearly like to use it, and use it for a variety of reasons. The strengths and opportunities clearly outweigh the weaknesses and threats. The weaknesses and threats are focussed around the dependency on tourist visitors.

Whilst the offer is improving through investment and new arrivals, there are no obvious large scale development sites that would trigger a significant change in the mix, offer and uses of the town. Change and improvement will happen as units become available and this should be encouraged; enabling an improved offer for local residents is something to encourage.

Kinross Town Centre

Overall, it would appear from the findings of the place review, business survey and household survey that Kinross is in a good state of health, is thriving and well placed in regards future trading prospects.

There are no urgent or pressing development sites that need addressing, occupying or developing, other than the tatty looking former pub building fronting onto Burns-Begg Street.

The town would benefit from the reopening of Loch Leven Pier and Lochleven Castle along with better signage and events to integrate the town centre with these two appealing and adjacent offers.

Pitlochry Town Centre

Given the findings of the household survey, business survey and place review it is fair to say that Pitlochry is in good health. Businesses report good levels of trade with 56% trading level or up on pre Covid levels (only 22% are down). Furthermore, businesses are very satisfied with their performance and that of the town, and they would recommend it as a place to trade.

Residents report a reasonable visit frequency with over half visiting at least weekly. Pitlochry is an established tourist destination and stop off point. It is catering well for the visitor, from shops, eateries and hospitality. The environment is appealing and complements the super local natural environment.

There is a little concern that the town may be losing its appeal to local residents, although they are using it for food and general shopping. Additional effort to increase the appeal, both day and evening appeal, to the local resident would be worth its while. It will be important to maintain its appeal as a visitor destination, therefore any opportunities to enhance the 'experience' of visiting should be supported. Equally it will be important to retain a good convenience and everyday offer for local residents. Delivery of the CAP recommendations will improve the appeal to local residents.

Perth's Neighbourhood Centres

Section 5 includes a review of the neighbourhood centres in the wider Perth City area. These range from small parades or clusters of small shops to single large foodstores / supermarkets. Each of the centres have substantial 'walk in' catchments (given their location within or adjacent to predominantly residential areas) and some also provide significant opportunities for passing-trade due to their prominence and position along a main aerial route. Many will benefit from the Perth People and Place initiatives looking to enhance the 20-minute liveable neighbourhood, with improvements to all modes of transport and access to neighbourhood centres.

Our review has identified those centres that are robust and sustainable, and those that are weak and in need of intervention and support. We have also considered in high level terms what those needs are, within the limitations of the centres' small-scale and localised, convenience based functions. Maintaining a broad mix of everyday convenience goods provision, service providers, public amenities (medical, health and education) and both daytime and night-time catering is clearly important for local neighbourhood centres. Those that are small / weak and sit in the shadow of large foodstores appear to be most likely to struggle.

Population & Expenditure Growth, Retail Capacity Forecasts, and Implications

The population of the Perth & Kinross catchment area is expected to increase by about 4% to 213,648 by 2037. This population growth and the expenditure arising will be available to support existing/new shops and services in the Perth and Kinross area; and will be boosted by 'inflow' expenditure from the visitor market. Inflow expenditure has differing levels of importance / benefit to centres across the area, which is difficult to quantify on a centre-by-centre basis.

Clearly, however, not all available expenditure in the catchment area will be spent in city/town centres in the Perth and Kinross area. A substantial proportion will be spent online and/or 'leaked' to competing shopping destinations. The retail capacity forecasts prepared for this Study account for this, informed by a new (2022) household telephone survey of shopping patterns.

The retail capacity forecasts, particularly beyond the next five years, should be treated with a degree of caution as they are based on various assumptions and forecasts that can and will change. Indeed, the substantial 'spare' capacity previously forecasted by 2026 (in the 2016 Study) is now superseded by over-supply.

The summary table below shows the capacity for convenience goods floorspace (sqm net sales area), with the net available expenditure to support new such floorspace shown in brackets/grey under the 'sqm net sales area' figures. It presents our individual capacity forecasts for convenience goods floorspace in the city and town centres and the 'non-central' shopping destinations, together with our overall (i.e. combined) forecasts for the Perth and Kinross area. The combined forecasts show that there will be a substantial theoretical over-supply of convenience goods floorspace from 2027 onwards, reflecting in part a short term reduction in per capita expenditure on convenience goods before a return to limited increases as the eating out of the home sector continues to impact on food and drink spending behaviour.

Summary of capacity forecasts: convenience goods (sqm net sales area)

	2027	2032	2037	Table number (Appendix C)
Perth City Centre	-1,500 (-£17.3m)	-1,450 (-£16.9m)	-1,450 (-£16.6m)	13
Kinross Town Centre	-200 (-£2.2m)	-200 (-£2.1m)	-200 (-£2.1m)	21
Auchterarder Town Centre	0 (-£0.1m)	0 (£0.1m)	50 (£0.4m)	29
Crieff Town Centre	-900 (-£10.5m)	-900 (-£10.3m)	-900 (-£10.1m)	37
Strathearn Area (sub-total)	*-900*	*-900*	*-850*	
Alyth Town Centre	-300 (-£3.2m)	-300 (-£3.2m)	-250 (-£3.2m)	45
Blairgowrie Town Centre	-1,850 (-£21.3m)	-1,800 (-£20.9m)	-1,800 (-£20.5m)	53
Coupar Angus Town Centre	n/a (n/a)	n/a (n/a)	n/a (n/a)	61
Strathmore and the Glens (sub-total)	*-2,150*	*-2,100*	*-2,050*	
Dunkeld & Birnam Town Centre	-150 (-£1.6m)	-150 (-£1.5m)	-150 (-£1.5m)	69
Aberfeldy Town Centre	300 (£3.6m)	350 (£3.8m)	350 (£4.1m)	77
Pitlochry Town Centre	50 (£0.3m)	50 (£0.6m)	100 (£0.9m)	85
Highland Area (sub-total)	*200*	*250*	*300*	
Non-central stores in Perth and Kinross	-550 (-£6.3m)	50 (£0.5m)	700 (£8.2m)	94
Combined forecasts for Perth and Kinross	**-5,100**	**-4,350**	**-3,550**	

Notes:
a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
b) Forecasts rounded to the nearest 50 sqm net.
c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

The position in respect of comparison goods floorspace is also one of substantial (and increasing) over-supply, as set out in the summary table below. This is not uncommon for city and town centres in the current climate, and it is perhaps unsurprising that the 'negative' comparison goods capacity forecasted is most significant in Perth City Centre.

On this basis, there is no quantitative 'need' to plan for new comparison goods floorspace and there will be a need to consider the contraction / repurposing of such floorspace and how the area's city and town centres should adapt and diversify to secure their vitality and viability.

Summary of capacity forecasts: comparison goods (sqm net sales area)

	2027	2032	2037	Table number (Appendix C)
Perth City Centre	-1,950 (-£10.8m)	-3,150 (-£19.1m)	-4,850 (-£32.6m)	13
Kinross Town Centre	-50 (-£0.2m)	-50 (-£0.4m)	-100 (-£0.7m)	21
Auchterarder Town Centre	-50 (-£0.3m)	-100 (-£0.5m)	-100 (-£0.8m)	29
Crieff Town Centre	-50 (-£0.3m)	-100 (-£0.5m)	-100 (-£0.8m)	37
Strathearn Area (sub-total)	*-100*	*-200*	*-200*	
Alyth Town Centre	0 (-£0.1m)	-50 (-£0.2m)	-50 (-£0.3m)	45
Blairgowrie Town Centre	-150 (-£0.9m)	-250 (-£1.5m)	-400 (-£2.6m)	53
Coupar Angus Town Centre	0 (-£0.1m)	-50 (-£0.2m)	-50 (-£0.4m)	61
Strathmore and the Glens (sub-total)	*-150*	*-350*	*-500*	
Dunkeld & Birnam Town Centre	0 (-£0.1m)	0 (-£0.1m)	-50 (-£0.2m)	69
Aberfeldy Town Centre	-50 (-£0.3m)	-100 (-£0.5m)	-150 (-£0.8m)	77
Pitlochry Town Centre	-50 (-£0.3m)	-100 (-£0.5m)	-150 (-£0.9m)	85
Highland Area (sub-total)	*-100*	*-200*	*-350*	
Non-central stores in Perth and Kinross	350 (£2.0m)	-450 (-£2.6m)	-1,550 (-£10.4m)	94
Combined forecasts for Perth and Kinross	**-2,000**	**-4,400**	**-7,550**	

Notes:
a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
b) Forecasts rounded to the nearest 50 sqm net.
c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

We have developed our retail capacity analysis, set out in section 8 of the report, to estimate the degree to which the city and town centres are likely to contract (or otherwise) over the plan period in terms of their overall scale of retail floorspace. This is expressed as a percentage of the total existing (2022) convenience and comparison goods floorspace within each centre, as shown in the table below.

Estimated change in total retail floorspace by 2037

	Total existing convenience and comparison goods floorspace (2022)	Forecast capacity for new convenience and comparison goods floorspace (2037)	Percentage change in total retail floorspace (2022-2037)
Perth City Centre	43,320 sqm gross 34,656 sqm net	-6,300 sqm net	-18%
Kinross Town Centre	1,905 sqm gross 1,524 sqm net	-300 sqm net	-20%
Auchterarder Town Centre	4,692 sqm gross 3,754 sqm net	-50 sqm net	-1%
Crieff Town Centre	8,334 sqm gross 6,667 sqm net	-1,000 sqm net	-15%
Alyth Town Centre	1,010 sqm gross 808 sqm net	-300 sqm net	-37%
Blairgowrie Town Centre	15,589 sqm gross 12,471 sqm net	-2,200 sqm net	-18%
Coupar Angus Town Centre	560 sqm gross 448 sqm net	-50 sqm net	-11%
Dunkeld & Birnam Town Centre	1,100 sqm gross 880 sqm net	-200 sqm net	-23%
Aberfeldy Town Centre	2,150 sqm gross 1,720 sqm net	200 sqm net	12%
Pitlochry Town Centre	7,219 sqm gross 5,775 sqm net	-50 sqm net	-1%

Notes:
a) Gross floorspace figures derived from Experian Goad for Perth, Kinross, Auchterarder, Crieff, Blairgowrie and Pitlochry; and from ProMap (estimated) for Alyth, Coupar Angus, Dunkeld & Birnam and Aberfeldy.
b) Net floorspace based on generic 80% net to gross ratio.

The estimated percentage change in total retail floorspace, as shown in the table above for the city and town centres, is necessarily indicative but serves to highlight the degree to which most of the centres are likely to be faced with retail contraction over the plan period to 2037.

For most centres, this equates to one or two retail units; and we would expect these to be repurposed rather than removed as active commercial space. The issue is likely to be most significant for the larger centres, notably Perth City Centre (which has experienced retail contraction since 2016) but also the likes of Blairgowrie and Crieff, which have a substantial amount of retail floorspace and are increasingly exposed to retailer's store rationalisation programmes and/or store failures. These larger centres are also (to varying degrees) somewhat reliant on the existing retail offer to drive trips.

The levels of retail contraction estimated are in spite of expected population and expenditure growth. The additional population will, however, bring wider benefits and opportunities in terms of supporting services and other local businesses in the Perth and Kinross area. Indeed, it has the potential to increase the demand for certain service sector uses that cannot be delivered or enjoyed online. Particular growth sectors (as highlighted in the market review in section 3) include health and beauty, and experience-based leisure uses including but not limited to F&B. It is difficult to quantify the likely scale of such growth; however, it is reasonable to assess that some of the space 'lost' through retail contraction will be replaced or reoccupied by other active commercial uses. Some space may also be repurposed for ground floor residential and/or office uses.

Through the Vacant Property Development initiatives, PKC offers advice and grant funding support to commercial property owners to upgrade and re-purpose their vacant properties for alternative uses.

Retail Expenditure Leakage & Clawback

Section 6 describes the market shares of catchment area expenditure presently secured by the city/town centres or 'lost' to competing shopping destinations outside the Perth and Kinross area.

Recognising the catchment area defined for the purpose of this Study extends beyond the administrative boundary of PKC and towards other settlements including Dundee and Stirling, it should be noted that for many catchment area residents, centres and stores outside the study area will remain the more attractive destinations by virtue of their proximity and accessibility. It is likely to be the shopping habits of those residents which are the most difficult to change irrespective of any improvements to the city/town centres.

The breadth and quality of choice, and making centres in Perth and Kinross as attractive and multi-purpose as possible, is also clearly relevant and will influence where and how often people visit for shopping and services. To that end, the most appropriate strategy for clawing-back expenditure leakage will involve addressing the issues and qualitative needs for improvement identified for the area's centres in section 4 of this report. The delivery of those (or as many as possible) suggested improvements will help to secure their future vitality and viability and make them more attractive to shoppers and other users, albeit recognising that the scale and nature of the smaller centres will remain a limitation in terms of their ability to retain trips and expenditure.

This is likely to require PKC intervention, acting as ringmaster and utilising its land interests to drive forward change and improvement and create the right conditions for wider investment in the centres.

Commercial Leisure Needs

Section 9 sets out how commercial leisure uses and activities (and non-commercial e.g. theatres, museums, parks) play an important role in contributing to the vitality and viability of the city and town centres in the Perth and Kinross area.

As is to be expected, Perth City Centre is the main destination for eating and drinking out (i.e. F&B) with its well established catering offer and wider leisure attractions such as Perth Playhouse (cinema) and Perth Theatre and Concert Hall. The City Centre has had a lack of representation by the national multiple brands for many years. This may now have been a benefit. The centre is well served by a variety of independent operators. That said, there is qualitative potential for an increased offer, including more national operators.

The scale of any growth in F&B provision will largely be dependent on market demand and conditions, and the City Centre's ability to continue to attract shoppers, workers and other visitors which, in turn, will generate footfall and activity to support new (and existing) F&B outlets. New opportunities for city centre living (including residential uses at ground floor level as promoted in Adopted NPF4) and the resulting population growth in and close to the City Centre will have an impact on demand within the F&B sector; however, it remains to be seen whether this would offset the potential loss of custom from office workers associated with the shift towards more 'agile' forms of working.

There is unlikely to be a high level of market demand for new F&B provision in town centres across the Perth and Kinross area. Yet the boutique-style cinemas planned for Auchterarder and Crieff, should they come forward, will provide more reason to visit and spend time in the towns and will have the potential to sustain additional F&B provision. There may also be opportunities for the area's more tourist-orientated towns (e.g. Aberfeldy, Dunkeld and Pitlochry), which have the advantage of significant visitor numbers, although a notable limitation is their lack of physical capacity to accommodate further F&B (and other forms of commercial leisure) due to very low vacancy rates.

Recognising that F&B is one of the few potential growth sectors for the city and town centres, there is a need for a flexible approach to accommodating such uses as and when suitable units become available. In respect of Perth City Centre, this should include existing voids and the larger units in need of reconfiguration and modernisation (which may also provide opportunities for other forms of commercial leisure).

The study area is currently represented by two cinemas (Perth Playhouse and The Birks Cinema in Aberfeldy), while Dundee and Stirling provide the main competition. The cinema plans for Auchterarder and Crieff suggest there is local demand. Any additional cinema provision over the plan period, including permanent and 'pop-up' cinemas for indoor or outdoor, should be supported in principle and considered as potentially adding to the offers and reasons to visit smaller rural centres.

It is not considered there is a need to plan for additional bingo, ten-pin bowling or other large format leisure uses although it is worth remembering of course that these are some of the few activities with particular appeal to families with children in city and town centres. In the longer term, as the catchment area population increases and new development proposals emerge, there may be additional demand for commercial leisure facilities, in which case any such provision should be directed to the 'town centres first' in accordance with the sequential approach to strengthen their diversity of uses and overall vitality. Perth City Centre and one or two of the largest rural centres would be able to sustain the popular hybrid catering and themed leisure offers that are arriving in many places.

Non-commercial leisure uses and activities are an important element of the all-round leisure offer and our assessment has identified that trips to parks, theatres, concert venues, museums and other places of historical / cultural interest are popular leisure-based activities among catchment area residents. There will be a need to support the continued improvement of the quality and choice of such attractions, including additional investment in cultural uses which will see the new Perth Museum open in 2024 and attract a predicted 167,000 visitors per annum. These are a key ingredient of town centre vitality, attracting a high number of visitors from across and well beyond the Perth & Kinross catchment area and, in turn, helping to support important service sector uses such as hospitality and F&B.

Policy Recommendations

Policy recommendations for managing change and city/town centre development are set out in section 11. Such advice is provided in the context of Adopted NPF4 and other potential planning reforms in Scotland, which could include the introduction of a new merged 'general town centre' use class.

The Adopted NPF4 sets out a strong 'town centres first' sequential approach and implies a moratorium on new retail development in out-of-centre locations (unless small scale neighbourhood retail development and/or ancillary retail in island and rural areas). This report is not the forum in which to debate or contest such a moratorium outlined in national planning policy. However, we consider it is potentially open to challenge and recommend that PKC seeks further advice, in terms of the implications for the city/town centre and retail policies of the new LDP, once the position becomes clearer.

The Adopted NPF4 encourages proposals that increase the mix of uses in city/town centre locations to enhance their vitality and viability. It further supports town centre living, affording flexibility for residential uses at ground floor level where appropriate. These provisions are compatible with the findings of this Study, which identifies 'surplus' retail floorspace and a need to manage the likely contraction of such floorspace. This should include providing appropriate flexibility for non-retail uses whilst ensuring the principles of 20-minute neighbourhoods are maintained.

Centre Futures & Strategy

A common forward strategy for each of the centres in Perth and Kinross is less about the scale of growth but how change is managed and supported through effective planning policies and decision-making, public sector interventions, and collaboration with landlords, occupiers and other local stakeholders. Change should be focused on how centres adapt to consumer demands and become more multi-purpose destinations in their offer, use and experience.

Perth City Centre

The impact of Covid-19 has highlighted the extent to which larger centres rely on traditional retail and service formats, indoor leisure and cultural venues, office workers and generally high levels of activity to support their vitality and viability.

Pandemic-induced change in shopping and lifestyle habits, including the shift towards home or 'agile' working, will continue to impact on the way that sub-regional centres (such as Perth City Centre) are used. Such centres struggled during the pandemic as most shops and other businesses were forced to close, resulting in more people working from or close to home and/or shopping locally in smaller centres, with significant consequences for footfall and activity.

Household survey research commissioned for this Study reveals that consumers who cited Perth City Centre as the centre they visit 'most often' for shopping and services no longer visit as frequently. Some 41% of respondents indicated they visit the city centre 'less often' than before the Covid-19 pandemic, while 53% visit ‘about the same’ post-pandemic. This poses an ongoing risk for the City Centre as consumers increasingly demand convenience and use larger centres for more occasional (comparison goods) purchases and/or leisure-based experiences that are not available in their local centres.

The trend towards ‘right-sizing’ has led retailers (and increasingly leisure operators) to target the most defensible and high-demand locations, where footfall and consumer spending is most resilient to economic changes. This is now affecting more and more larger centres. Perth City Centre is increasingly exposed to such trends; a recent case example being the lifestyle retailer Joules which fell into administration in November 2022, resulting in the closure of its St Johns Street store and highlighting the fragility of even the strongest brands.

The city centre’s role as a principal comparison goods shopping destination also makes it susceptible to wider structural changes in the retail sector and the growth of online shopping, which is increasing the propensity of consumers to buy comparison goods online rather than in-store. Our analysis suggests the centre’s existing retail offer could contract by approximately one-fifth by the end of the plan period; some of which may be replaced or reoccupied by services and other active commercial uses as the population grows.

The foregoing underlines the need for Perth City Centre to be more multi-purpose in its offer and provide consumers with a range of physical uses and experiences that are not available online or in their local centre. This could include better quality and more choice of F&B operators, targeting missing components of the city centre leisure offer (e.g. indoor golf, climbing, themed hospitality) as well as opportunities for an indoor foodhall to complement its already strong independent catering offer and a ‘makers’ market to attract creative industries, build on the UNESCO Creative Cities Network recognition and support additional local start-ups. These types of attractions would help to diversify the city centre offer, improve the reasons to visit and extend hours of activity. They also create unique identities that help to define and enhance the sense of place. Providing high quality spaces, with shared tables and chairs, curated markets, events and performances all help to create more of an experience that is unique and cannot be provided online. Perth is also looking to expand the range of cultural and heritage reasons to visit the city, with the opening of the new Perth Museum.

An important theme will be space sharing and identifying opportunities for repurposing (or redeveloping) redundant or under-utilised retail spaces. These include the four large buildings/sites considered in section 10, namely:

i. Former Debenhams store, High Street

ii. Former Beales store, St John Street

iii. Matalan store, Victoria Street

iv. St John’s Shopping Centre

Each of these sites are particularly important to the future vitality and viability of Perth City Centre, and are likely to require a proactive approach and intervention from PKC to drive delivery. This proactive approach already exists within the city including through the Vacant Property Development initiatives.

Other important themes will include creating the right conditions for investment (e.g. extending the public realm improvements as identified in the city centre healthcheck at section 4); improving accessibility and connectivity with surrounding attractions; and providing a strong digital proposition to better align the city centre’s offer with consumer demands and the needs of retailers as they look to integrate physical and online platforms. Many of these initiatives are included in the current Perth City Development Plan.

There is also potential for new residential development in and close to Perth City Centre, which will help to generate new trips, footfall and spend for the benefit of existing shops and businesses, as well as supporting new provision. However, as the *Scottish City Centres* report prepared by Savills (December 2022) highlights, the City Centre’s residential market is weak, particularly for apartment accommodation, with rental values and demand not sufficient to attract institutional investment in residential product to rent.

The town centres

The nine town centres in the Perth and Kinross area will need to diversity their offers and user experiences to remain relevant and attractive. Although the town centres are generally less susceptible to the trend of retailer downsizing (relative to Perth City Centre) they will need to become more multi-purpose in the context of changing consumer behaviours, the growth of online shopping, and the increasing prospect of retail business closures.

The town centres are unlikely to support new retail development over the next 5-10 years and beyond. Retail contraction is more likely for most centres. Although retail will remain a key part of their respective offers and an important driver of activity, town centre strategies and policies should promote greater flexibility to ensure centres can respond and adapt to future trends and changes. This flexibility and diversity will, in turn, help to create more resilient and attractive centres. The good news is that all of the centres outside of Perth are dominated by independent businesses who are resilient to national chain closures. These businesses are also facing challenging times, and are in need of help and support given the current and forecast economic climate.

Some of the town centres – including but not limited to Aberfeldy, Dunkeld & Birnam and Pitlochry Town Centres – may fare better than others due to their attractiveness to and reliance on tourists (including those from oversees who are likely to benefit from a weaker pound relative to the dollar).

The trend to home-working and the emerging interest in flexible co-working hubs in smaller towns (such as the examples in Crieff and Dunkeld identified in the Employment Land Report) should benefit the town centres in a number of important respects. Firstly, more of the area's population working from home will meet their essential day-to-day shopping and service needs close to where they live, which will help to strengthen the vitality and viability of those local centres and businesses. Secondly, there is likely to be increased demand for offices in the town centres, potentially in the form of repurposed retail space and flexible co-working space in larger mixed-use buildings.

The need to invest in the quality of town centre environments (including shop fronts, streetscapes and public realm) will also be important to create more attractive, accessible and safe places to visit and spend time in as highlighted above.

Most of the town centres, bar Crieff, Blairgowrie and Coupar Angus appear to be either thriving or in good health. Crieff and Blairgowrie have loyal shoppers, rich histories and some excellent independent businesses. With the right support and intervention from the Council, and well designed and appropriate Growth Action Plans developed in conjunction with local businesses in each place, there is every reason to believe that these centres can thrive in the future. Coupar Angus is the one centre that seems to be facing an uncertain future and it may be that this centre be downgraded to a neighbourhood centre, with the existing town centre being allowed to contract and refocus.

Perth's neighbourhood centres

Smaller 'localised' centres tended to be more resilient to Covid-19 impacts as more people worked from or close to home and/or chose to shop locally where possible. In this respect and considering the principles of 20-minute neighbourhoods, the existing network of neighbourhood centres in Perth play an important role in terms of promoting local businesses, providing access to key services and facilities, and encouraging more sustainable forms of travel.

These types of centres predominantly cater for the day-to-day service needs of local residents and typically include a limited offer in respect of convenience goods. They are therefore less exposed to the structural changes in the retail sector but will still be 'at risk' as consumers increasingly shop around for best value at larger format discount stores, supermarkets as well as online businesses.

In section 5, our neighbourhood centre reviews have identified that Perth's stronger neighbourhood centres are those with a reasonable convenience offer (as an anchor), supported by a hair and beauty offer, a selection of services providers (as daytime footfall generators), and a take-away offer (for both day and night-time business).

Centres close to major foodstores, particularly those that don't have the offer outlined above, are struggling to maintain vitality.

The local neighbourhood centres need to remain as accessible and convenient as possible. This need for good accessibility relates to walking, cycling, public transport as well as car users (trade from passing traffic is likely to be a substantial component of spend). Short term on-street car parking will continue to be important. The Perth People and Places initiative is looking to improve all modes of access and transport for local neighbourhood centres.

Engaging with local businesses to help them grow their businesses as well as working together for the betterment of the centre will be increasingly important going forward.

Future Performance Monitoring

It will be important to keep under review the changing performance of the city and town centres in the Perth and Kinross area.

The evidence and analysis set out in this Study provides a framework for the regular performance monitoring of the city and town centres. It allows for updated and/or third party information to be 'added in' so as to develop the evidence base further. This can also include the addition of / comparison to wider performance data, mobile monitoring for pedestrian movement, credit card / loyalty card activity and other information that the Council and its partners may have access to. To enable a strong comparable and benchmarked data set, it will be necessary to compare any wider data sets to that of the Study findings within 6 months of completing this Study, or after any interim updates of information already included in the Study scope of research. To assist with the ongoing monitoring and use of the information contained in this Study, the report includes the foundations of a *Perth Data Dashboard*. This dashboard summarises key statistics from the Study and allows for the addition of data from other sources, like those mentioned above.

To inform this Study, business interview surveys in each of the centres have been designed and undertaken, and a new household telephone survey of catchment area residents. These establish a 'baseline' of performance indicators based on the views and ideas of businesses (in 2022) and residents/customers (in 2022 plus 2016 insofar as available) which can be easily updated in future.

The detailed findings and observations set out in the city and town centre healthchecks at section 4 of this report provide a further series of 'baseline' Key Performance Indicators (KPIs) which can be measured, and responded to / updated, over time.

The findings of this Study as regards shopping patterns (or market shares), retail floorspace capacity and leisure-trip habits/needs can also be kept under review and updated in future. This can be undertaken without any requirement for new household survey research over the next five years.

In the near-term, it is strongly recommended that PKC commissions on-street visitor surveys to provide an important additional input to performance analysis and catchment definition. This would be particularly necessary with regards to the smaller town centres which achieved a limited sample size in the 2022 household survey research, yet would help to inform strategies for planning, placemaking and marketing for all centres in the Perth and Kinross area. The on-street visitor surveys would supplement the performance monitoring dashboard and could include questions relating to visit of frequency, dwell time, mode of travel, facilities used, estimated spend by goods / service category, core visit drivers, main likes, and areas for improvement to increase visits. Most importantly of all, it probes and surveys actual shoppers, visitors and users of any given centre; a very important customer group to retain and grow.

1. Introduction

Purpose of the Study

1.1 The Retail Group and CPW Planning have been commissioned by Perth and Kinross Council ('PKC') to prepare a new Perth & Kinross City and Town Centre Retail Study. It supersedes the previous *Perth & Kinross Town Centre and Retail Study 2016* prepared by Roderick MacLean Associates and Ryden (hereafter 'the 2016 Study').

1.2 The Study is focused on the following centres in the Perth and Kinross area:

- Perth City Centre
- Aberfeldy Town Centre
- Alyth Town Centre
- Auchterarder Town Centre
- Blairgowrie Town Centre
- Coupar Angus Town Centre
- Crieff Town Centre
- Dunkeld & Birnam Town Centre
- Kinross Town Centre
- Pitlochry Town Centre
- Perth's Neighbourhood Centres

1.3 The Study has been prepared in the context of significant changes and events since the 2016 Study. These include Brexit, changing economic conditions, the Covid-19 pandemic, the continued growth of online shopping, widespread retailer closures, and (responding in part to such challenges) the newly adopted Fourth National Planning Framework for Scotland ('Adopted NPF4') and other potential planning reforms in relation to permitted development rights.

1.4 The Study is based on the latest available information including primary research in the form of city and town centre inspections, business-to-business interview surveys in each of the centres, and a new household telephone survey of shopping patterns in the area.

1.5 The main objectives of the Study can be summarised as follows:

i. Review the national and local planning policy context relevant to the Study;

ii. Consider the retail and leisure markets – and the trends and implications for centres in the Perth and Kinross area;

iii. Undertake city and town centre healthchecks including assessment of qualitative needs;

iv. Analyse shopping patterns (or market shares), including expenditure leakage, and other consumer behaviours based on the results of the new household telephone survey;

v. Forecast the expenditure-based capacity for new (or surplus) retail floorspace in the area;

vi. Prepare a commercial leisure 'needs' assessment;

vii. Planning policy recommendations; and

viii. Provide a framework for future performance monitoring.

1.6 The Study therefore provides the evidence base to assist PKC with its work on the Local Development Plan ('LDP') review and related economic development frameworks; and supports the development management function of the local planning authority. It also informs the regular performance monitoring of the city and town centres in the Perth and Kinross area.

1.7 Reference is made to the *Perth & Kinross Employment Land and Property Market Analysis 2022* prepared by Ryden (hereafter 'the Employment Land Report') insofar as relevant to the local office market and its implications for town centre vitality.

Structure of the Study

1.8 This Study is structured as follows:

- Section 2 – Planning Policy Context
- Section 3 – Market Context and Trends
- Section 4 – City and Town Centre Reviews
- Section 5 – Perth's Neighbourhood Centre Reviews
- Section 6 – Catchment Area and Market Share Analysis
- Section 7 – Retail Capacity: Approach and Baseline Evidence
- Section 8 – Retail Capacity: Forecasts
- Section 9 – Commercial Leisure Needs Assessment
- Section 10 – Key Opportunity Sites
- Section 11 – Summary and Policy Recommendations

1.9 The Study refers to and should be read in conjunction with the following appendices:

- Appendix A – Business survey summary tables
- Appendix B – Household survey summary tables
- Appendix C – Retail capacity tables
- Appendix D – Map of the catchment area
- Appendix E – Results of the 2022 household telephone survey

2. Planning Policy Context

2.1 To help inform the preparation of this Study, this section provides an overview of relevant Scottish and local planning policy pertaining to retail and other town centre uses.

2.2 This includes the newly adopted NPF4 and other potential planning reforms in relation to permitted development rights.

Adopted Fourth National Planning Framework (Adopted NPF4)

2.3 NPF4 was adopted by the Scottish Ministers on 13 February 2023 and sets out the policies for planning and development in Scotland up to 2045. It replaces Scottish Planning Policy and NPF3 and forms part of the statutory development plan, against which planning applications are determined. The LDP review process can include additional policies where necessary and locally appropriate; but cannot contradict the Adopted NPF4.

2.4 The Adopted NPF4 recognises that Scotland's city and town centres are facing significant economic, environmental and societal challenges. Furthermore, the policy approach for city and town centres reflects and supports the principles of 20-minute neighbourhoods.

2.5 Policy 27 (City, town, local and commercial centres) requires promotes development in city and town centres. The policy wording sets out:

a) Development proposals that enhance and improve the vitality and viability of city, town and local centres, including proposals that increase the mix of uses, will be supported.

b) Development proposals will be consistent with the town centre first approach. Proposals for uses which will generate significant footfall, including commercial, leisure, offices, community, sport and cultural facilities, public buildings such as libraries, education and healthcare facilities, and public spaces:

i. will be supported in existing city, town and local centres, and
ii. will not be supported outwith those centres unless a town centre first assessment demonstrates that:

- *all centre and edge of centre options have been sequentially assessed and discounted as unsuitable or unavailable;*
- *the scale of development cannot reasonably be altered or reduced in scale to allow it to be accommodated in a centre; and*
- *the impacts on existing centres have been thoroughly assessed and there will be no significant adverse effect on the vitality and viability of the centres.*

c) Development proposals for non-retail uses will not be supported if further provision of these services will undermine the character and amenity of the area or the health and wellbeing of communities, particularly in disadvantaged areas. These uses include:

i. Hot food takeaways, including permanently sited vans;
ii. Betting offices; and
iii. High interest money lending premises.

d) Drive-through developments will only be supported where they are specifically supported in the LDP.

2.6 Parts (e-g) of Policy 27 include policies for town centre living. Flexibility is afforded for residential uses in city and town centres, including (at Policy 27f) support for residential uses at ground floor level where it can be demonstrated that the proposal will:

i. retain an attractive and appropriate frontage;
ii. not adversely affect the vitality and viability of a shopping area or the wider centre; and
iii. not result in an undesirable concentration of uses, or 'dead frontages'.

2.7 Policy 28 (Retail) promotes retail development in the most sustainable and accessible locations to meet the needs of communities and to support vibrant city, town and local centres. The policy wording sets out:

a) Development proposals for retail (including expansions and changes of use) will be consistent with the town centre first principle. This means that new retail proposals:

i. will be supported in existing city, town and local centres, and
ii. will be supported in edge-of-centre areas or in commercial centres if they are allocated as sites suitable for new retail development in the LDP.
iii. will not be supported in out of centre locations (other than those meeting policy 28I or 28(d)).

b) Development proposals for retail that are consistent with the sequential approach (set out in a) and click-and-collect locker pick up points, will be supported where the proposed development:

i. is of an appropriate scale for the location;
ii. will have an acceptable impact on the character and amenity of the area; and
iii. is located to best channel footfall and activity, to benefit the place as a whole.

c) Proposals for new small scale neighbourhood retail development will be supported where the proposed development:

i. contributes to local living, including where relevant 20 minute neighbourhoods and/or
ii. can be demonstrated to contribute to the health and wellbeing of the local community.

d) In island and rural areas, development proposals for shops ancillary to other uses such as farm shops, craft shops and shops linked to petrol/service/charging stations will be supported where:

i. it will serve local needs, support local living and local jobs;
ii. the potential impact on nearby town and commercial centres or village/local shops is acceptable;
iii. it will provide a service throughout the year; and
iv. the likely impacts of traffic generation and access and parking arrangements are acceptable.

Potential changes to the Use Classes Order and Permitted Development Rights

2.8 The Scottish Government launched a consultation on permitted development rights (PDR) in May 2022.

2.9 One of the most significant potential changes is a merged "general town centre use class" bringing together several existing classes intended to support the regeneration, resilience and recovery of Scotland's centres, as the Adopted NPF4 seeks to provide for.

2.10 The consultation sets out that, if a merged use class is taken forward, a critical consideration is what uses should be included within it. An indicative proposal of bringing together Class 1 (shops), Class 2 (financial, professional and other services) and Class 3 (food and drink) has been put forward[1] in addition to consideration for including certain uses in Class 10 (e.g. art galleries) and Class 11 (e.g. gyms).

2.11 The consultation is less supportive about the prospect of including 'bad neighbour' uses and Class 4 (business) in a merged use class. It recognises that combining Class 4 with Class 1 in the Use Classes Order would allow out-of-centre offices to change to retail use without planning permission, which could undermine policy in the Adopted NPF4 and have adverse impacts on the vitality and viability of existing centres.

2.12 Notwithstanding, the consultation indicates that a new PDR is under consideration providing for certain premises (e.g. those within Classes 1, 2 and 3 – or within a merged use class if taken forward) to change

[1] Similar to the 'new' Class E – broadly encompassing retail, commercial, business and service uses – introduced in England and Wales in September 2020.

to Class 4. This recognises the role of smaller-scale, often decentralised workspaces further to the pandemic-induced changes in working patterns. It is envisaged that any such PDR would be subject to a maximum floorspace limit (e.g. 300 square metres) so as not to have unintended consequences for established office locations.

2.13 The consultation is also seeking views on the PDR for moveable outdoor furniture (e.g. pavement seating) adjacent to hospitality premises, which ended in September 2022 following its introduction during the pandemic.

2.14 With regards to new residential development in city and town centres, which is supported in Adopted NPF4 (notably Policy 27), the consultation takes the view that a new PDR providing for the conversion of shops, offices and other 'town centre' uses to residential would be inappropriate.

Perth & Kinross Local Development Plan (LDP)

2.15 The LDP comprises the development plan for the Perth and Kinross area. It was adopted in November 2019 and guides the future development and use of land in the area.

2.16 The policies of relevance to this Study are identified below.

2.17 Policy 10 supports Class 1 (retail) uses in the City, Town and Neighbourhood Centres. It states that, *Changes away from city centre uses such as employment uses, retail and community facilities towards residential will be resisted unless there is demonstrable market evidence that the city centre use is no longer viable.*

2.18 The policy adds the Council will discourage changes of use from *ground floor uses within Classes 2 and 3 (building societies, estate agents, restaurants and cafes etc) … and leisure, entertainment, recreation, cultural and community facilities*, unless *it can be demonstrated that the proposal would not be detrimental to the character, vitality and viability of the centre and it can be demonstrated that there is no commercial demand for the existing use*.

2.19 Policy 11 relates to the Perth City Centre Secondary Uses Area, where the Council promotes a mix of appropriate uses including shops, residential, offices, cultural facilities (including theatres and other arts venues), restaurants, pubs and clubs. It states particular encouragement will be given to development that maintains or creates small specialist shopping units.

2.20 Policy 12 seeks to control additional retail development in the commercial centres, indicating that increased floorspace will only be acceptable where (inter alia):

- *a sequential assessment demonstrates that no other suitable site in a sequentially preferable location is available or is likely to become available within the lifetime of the Plan;*
- *it can be demonstrated that there would be no significant impact (individual or cumulative) on any city or town centre;*
- *it can be demonstrated that the proposal would help meet quantitative or qualitative deficiencies in existing provision;*
- *it can be demonstrated that there would be no change to the role or function of the centre in the network of centres;*
- *it would be of an appropriate scale.*

2.21 Policy 13 describes the sequential approach for development proposals involving retail, commercial leisure and other *'significant footfall'* uses, with a preference for city or town centres, followed by edge-of-centre locations; other commercial centres; and out-of-centre locations easily accessible by a choice of transport modes.

2.22 The policy requires an impact assessment for retail and leisure development proposals of 1,500 square metres (gross) or more, which are outside a defined town centre boundary and not in accordance with the development plan. Proposals in edge-of-centre locations, other commercial centres and out-of-centre locations will only be acceptable where (inter alia):

- *it can be demonstrated that a proposal helps meet quantitative or qualitative deficiencies in existing provision;*

- *it is supported by a favourable sequential assessment;*

- *it is of an appropriate scale;*

- *it has been demonstrated that there will be no significant impact (individual or cumulative) on any of the centres within the network of centres.*

Perth City Plan

2.23 The updated Perth City Plan – *Perth 2040: Our Agenda for Change* – was published in August 2019. It sets out a 20-year strategy for good growth produced by the Perth City Development Board (PCDB), a private sector-led partnership including leaders from business, civil society and the public sector.

2.24 The Plan aims to make Perth one of Europe's great 'small cities' with an ambitious agenda for change based around six key themes: placemaking, sustainability, connectivity, the city centre, enterprise and inclusion.

2.25 These priorities respond to several challenges facing Perth, including but not limited to an ageing population, the future of work, and the changing role of city centres. With regards to the latter, the Plan observes:

There is a surplus of retail space throughout the UK, with many familiar brands going to the wall. We're spending more time and money on online shopping and leisure at a time when household budgets are under increasing strain. If we want people to choose the city centre as a place to live, shop, work, learn and meet, businesses need to offer their customers unique products and experiences. Perth is a handsome city in a memorable setting; it is investing in culture and heritage, and has a growing reputation as a food town. Now it needs to broaden its appeal and establish a lively evening economy.

2.26 The Plan's ambitions for revitalising the city centre include the Tay Cities Deal, which will deliver an investment of up to £10m in cultural-led transformation. Flagship projects include the Perth Museum & Art Gallery and a new space for an arts, crafts and heritage programme at City Hall.

2.27 Other initiatives and plans include a new 4-5 star hotel with conference facilities in the city centre, in addition to boutique hotels / 'restaurants with rooms' which, together with the new cultural and heritage attractions, should help to double the volume and value of tourism in Perth by 2029.

2.28 The Plan further promotes a more people-friendly city centre environment, including through public realm enhancements around the City Hall and the first phase of the Vennels project.

3. Market Context and Trends

3.1 It is important when assessing future retail and leisure development needs in the Perth and Kinross area to consider the market context and the trends influencing change and investment decisions, particularly in the retail sector.

3.2 The structure of the retail sector has been changing at pace over the past decade, with the rise of online shopping and the scale of retailer closures having significant implications for city and town centres. The pandemic-induced closure of all but 'essential' shops and stores during the national lockdowns of 2020 and 2021 has further resulted in new shopping (and lifestyle) habits, forcing businesses to respond to digital demands and re-evaluate their space requirements.

3.3 The pandemic has also had long-lasting and potentially permanent impacts on the leisure and hospitality sectors. Meanwhile, city office markets are adjusting to the shift towards 'agile' working and other occupational demand factors, with the Employment Land Report observing signs of interest in flexible workspaces in regional and smaller towns.

3.4 Change brings opportunities, however, and the early part of the year (2022) brought hope of continued market recovery. Those green shoots are now threatened by predictions of an impending and long-lasting recession: issues such as rising inflation and a cost of living crisis have dented consumer confidence and therefore, coupled with labour shortages and supply chain issues, the retail and leisure sectors are once again facing difficult market conditions.

3.5 Against this background, we provide below an overview of the retail and leisure markets; and refer to the main findings of the Employment Land Report as relevant to the local office market. The rest of this Study considers in more detail the potential implications for the city and town centres – and smaller neighbourhood centres – in Perth and Kinross.

Retail Market

3.6 The retail sector endured a particularly difficult pandemic, with multiple lockdowns and online competition resulting in the permanent closure of many shops and businesses. Coupled with a significant drop in lettings, this large-scale disruption led to increasing vacancies, with less affluent towns and shopping centres most severely impacted. Shopping centres were hit disproportionately hard due to their higher proportion of occupiers within fashion and hospitality – two of the sectors most affected by the pandemic – while retail parks generally prospered and have remained the most robust type of retail location since the relaxation of restrictions. Smaller 'localised' centres also tended to be more resilient as more people worked from or close to home and/or chose to shop locally where possible.

3.7 Moving forward to H1 2022, the Local Data Company[2] reports that Scotland was the only region of the UK to see a year-on-year rise in vacancy rates (from 12.7% in H1 2021 to 14.7% in H1 2022):

Following the pandemic, Scotland was slower to reopen than the rest of GB ... Scotland will need to see a recovery in occupier take-up or have vacant retail units taken out of the system to avoid falling behind other regions. However, we must note that the Scottish town centres are on average larger than those in other regions, which would have increased the impact on vacancy rates.

3.8 Little new retail space is likely to come forward in the next few years, which should offer some support to the availability rate. The trend of converting retail space to other uses is also likely to accelerate in the face of a significant contraction in retailer demand, albeit supermarkets and discount retailers (falling into the UK Government's definition of "essential" shops during lockdowns) are among the few pockets of continued resilience from a demand perspective. This is evident from the nature of recent openings and proposals in the Perth and Kinross area, which are dominated by the likes of Aldi, Lidl and B&M.

3.9 The potential planning reforms in Scotland, which could include the introduction of a new merged 'general town centre' use class (similar to Class E effective in England and Wales), would make it easier

[2] Local Data Company's H1 2022 retail and leisure trends analysis.

for businesses and landlords to adapt and repurpose vacant and/or under-utilised retail space for alternative uses.

3.10 The remainder of our retail market review considers some of the key trends influencing change in the retail sector.

The growth of online shopping

3.11 The rapid growth in online shopping since the late 1990s has increased the market share of non-store retail sales with visible consequences for high streets and other shopping destinations. Yet the degree of impact is not easily determined in the context of multi-channel retailing: stores are often a source of stock for online retail sales, while the internet can even direct customers to stores (e.g. use the internet to research but make purchase in store).

3.12 In 2019, before the Covid-19 outbreak, online shopping accounted for around 20% of total retail sales with significant variations by sector. Only around 5% of food sales were internet-based, whereas almost 20% of clothing and footwear sales (a key sector for many larger town centres) were attributable to online shopping. Some 60% of sales on DVDs, music and books were made online.

3.13 The pandemic and the national lockdowns that followed, resulting in the temporary closure of many shops, accelerated the growth in online shopping. According to UK figures published by ONS, online retail sales as a proportion of total retail sales peaked at above 30% in January 2021, before falling in the following months as restrictions were gradually lifted over the spring and summer. Notwithstanding the drop in non-store shares during 2022, it is expected that online retail sales will remain higher than 2019 levels. In preparing the retail capacity forecasts for this Study we have assumed that online currently accounts for 7% of convenience goods expenditure and 22.5% of comparison goods expenditure.

3.14 The pandemic has also increased consumer usage of delivery services such as Deliveroo and Just East. Whilst these can be beneficial for local businesses in local centres where food is collected directly from businesses, the development of dark kitchens in industrial or commercial parks is diverting expenditure from local centres and local independent businesses.

Improved digital capability

3.15 Today's consumer is demanding, often unwilling to wait more than 2-3 days for deliveries, whilst being increasingly dependent on technology to fulfil one's shopping needs. The pandemic has changed or reinforced pre-lockdown behaviours, with more consumers willing to try – and switch to – digital forms of shopping.

3.16 Modern retailers are therefore investing more and more in digital platforms. This is coinciding with the decisions of some retailers to close their bricks-and-mortar stores and transform into online-only brands. Examples include Maplin, Cath Kidston, and TM Lewin; and the trend is not limited to retail, with Thomas Cook (travel agent) and others also relaunching as online-only businesses. Success is not guaranteed, however, as seen with the collapse of MADE.com in November 2022.

3.17 While many larger retailers are investing in digital channels, this is not necessarily the case with smaller independents and high street businesses (although Covid-19 related impacts have forced some businesses to establish or develop online interest in order to generate sales). For most retailers, however, successfully combining physical and digital propositions will be necessary in the face of an increasingly competitive marketplace.

Right-sizing store portfolios

3.18 Prior to Covid-19, the shift towards online shopping resulted in a period of significant change and quite considerable consolidation from long-standing UK retailers. Large retailers increasingly focused on a smaller number of prime locations for their store portfolios (often referred to as *polarisation*) where they can have flagship-type stores and serve wide catchments. Others relaunched as online-only businesses, as commented before.

3.19 Much of this change can be attributed to a large number of loss-making stores, particularly in the context of reducing footfall and a highly competitive pricing environment. Company voluntary arrangements (CVAs) have been a preferred restructuring method for many retailers such as Debenhams (which closed in Perth City Centre in 2021 following the sale of the department store brand to online retailer BooHoo), Monsoon, Mothercare, Homebase, New Look and Accessorize.

3.20 Some retailers are continuing to 'right-size' or even abandon their store portfolios. Others however – notably the discounters such as Aldi, Lidl and B&M – continue to expand throughout the UK and mainly in out-of-centre locations. Indeed, since the 2016 Study, Aldi and B&M have opened new stores on Broich Road in Crieff; and Lidl and Home Bargains have opened new stores on Perth Road in Blairgowrie.

3.21 The pandemic has also had a major impact on the 'grab-and-go' food market, which relies heavily on office workers and commuters. The shift in work patterns and the reduction in footfall has made some outlets unviable, with Pret and Costa Coffee announcing widespread closures in the past 12-18 months.

3.22 Service-based retail uses (i.e. financial services, travel agents) have seen a gradual contraction in store numbers in recent years, due to the continued growth of internet alternatives which provide convenient access to online banking and holiday price-comparison websites. This form of structural change has consequences for footfall and consumer spending, most notably in secondary town centres which are more dependent on such uses.

3.23 Another service sector use, health and beauty, is seeing a major expansion on the high street. The recent research by the Local Data Company identifies beauty salons and barbers as two of the 'top 10' fastest-growing categories. Beauty uses are increasingly fragmenting into specialist treatment businesses (e.g. nails, eyelashes, facials, Turkish barbers) – all physical uses that cannot be delivered online – and their presence is often a good indicator of regular, local resident footfall.

Changing store formats

3.24 Consumers have high expectations for convenience, experience and personalisation; largely driven by smart phone technology (i.e. Apps) and social media (i.e. Facebook, Instagram, TikTok). Shopping is becoming more leisure focused and activity-based, which is reflected in new, often extensive store formats.

3.25 Some retailers, on the other hand, require (or are experimenting with) smaller and more efficient store formats. Homebase has launched a new split-level, small format showroom dedicated to kitchens (at ground floor level) and bathroom displays (first floor). Dunelm operates a similar town centre format, as does Decathlon which is rolling out smaller sized stores in city centre locations. These concepts align with the shift towards home or 'hybrid' working and greater levels of spending on home improvements.

3.26 The grocery sector has been reacting to changing shopping habits in recent years with implications for store formats. The underlying trend prior to Covid-19 was the decline of 'bulk' food shopping as consumers shopped around for best value and/or undertook more frequent top-up (or 'basket') food shopping trips. This trend has coincided with Aldi and Lidl expanding their market share, driven by store expansion programmes, and it was confirmed in September 2022 that Aldi has overtaken Morrisons to become the UK's fourth-largest grocery retailer. Meanwhile, smaller convenience store formats continue to benefit from an increase in consumers shopping locally and more frequently – identified by the Local Data Company as a 'top 10' fastest-growing category in H1 2022. All of the centres considered for the purpose of this Study include smaller convenience store formats, and some would benefit from additional such provision.

3.27 Retailers are increasingly incorporating click-and-collect services into their stores or within adjacent customer car parks (for example both Tesco and B&Q on Crieff Road in Perth). As well as often accounting for a substantial proportion of retailers' online sales, click-and-collect reduces 'last mile delivery' costs and can create additional sales volumes. Next were one of the pioneers of click-and-collect, and continue to do so in Perth City Centre.

Space sharing

3.28 The adaptability of retail space is increasingly important in a fast-moving sector. There is greater collaboration between retailers in terms of sharing space; and between shopping centre landlords and their tenants in the provision of collection points and/or lockers. To that end, there are Amazon pick-up lockers in several Co-op convenience stores, post offices and other businesses throughout Perth and Kinross.

3.29 One of the most successful retailer tie-ups has been Sainsbury's and Argos, while Laura Ashley recently returned to the UK high street in a new partnership with Next. B&Q has concession stores in a small number of Asda superstores, and Peacocks often takes concession space in Co-op convenience stores. Within the study area, the MacNaughtons department store in Pitlochry has a Brook Taverner concession.

3.30 The sharing of town centre space is not limited to the retail sector, however, and there are good examples throughout the UK. Post offices can often be found inside convenience stores and other host locations. Foundry in Eastbourne Town Centre (The Beacon) is an excellent example of shared, repurposed shopping centre space. Spread over two floors, it offers a range of co-working and incubation spaces for rent as well as ground floor concession space for independent traders.

3.31 A further example – west along England's South Coast – is Bournemouth's iconic former Debenhams building, which has been reinvented as a community, experience-led mixed use destination for local traders and entrepreneurs. Now known as Bobby's, it includes a market hall, a beauty hall, artist space and a gallery, a traditional ice cream and coffee parlour, and other food and beverage uses with outdoor seating.

3.32 In Stockton-on-Tees, the local authority has taken a long lease on a large empty store on the High Street and has converted the ground floor into an Enterprise Arcade, where local entrepreneurs and start-up businesses can lease floorspace to trade from on very flexible and short term (monthly) deals as required.

3.33 In nearby Thornaby, a local entrepreneur has converted redundant offices on the first floor above a shopping centre into a high-tech gaming lounge with virtual games, PCs and games consoles available to use on an hourly booking basis.

3.34 Such concepts highlight the potential opportunities for the re-use of the former Debenhams department store in Perth City Centre and other vacant or under-utilised buildings (subject to viability and other factors).

3.35 Innovative concepts of this nature are likely to become more common as large, redundant retail (and non-retail) spaces become more difficult to fill with single occupiers; and will help to offset rising occupancy/operational costs. The potential changes to the Use Classes Order in Scotland, which include introducing a new merged 'general town centre' use class, will (if taken forward) provide greater flexibility and make it easier to co-locate two or more asset classes within the same premises.

Meanwhile uses

3.36 Markets have always been an important part of many city and town centres across the UK, bringing animation and vibrancy which traditional high streets often lack. Both Perth and Aberfeldy have monthly farmers' markets which are well regarded (although the latter was not trading during the time of review).

3.37 New ways of generating activity and engaging with town centre users have emerged in recent years in the form of pop-up shops and other uses including flexible workspaces. Perth City Centre has a number of pop-up charity shops, art installations and other temporary uses. As well as addressing vacant or under-utilised space and tapping into local entrepreneurialism, they help to deliver a bespoke retail experience and often become permanent attractions.

Leisure Market

3.38 The continued growth of online shopping and 'experiences' is having an impact on retail, yet leisure plays a major role in extending dwell times and supporting the evening economy of city and town centres. It creates a reason to visit other than to shop and can also widen catchment areas.

3.39 Consumers have been spending more on leisure activities and experiences in recent years, albeit the sector is expected to face some headwinds as consumers tighten their spending (due to the cost of living crisis and the looming recession).

3.40 The leisure sector was heavily impacted by the pandemic-induced closures and social distancing measures. For instance, in Scotland, cinemas and other indoor entertainment venues were forced to close from March 2020 and did not fully re-open until July 2021. The falling admissions led to a number of large cinema operators facing financial hardship, including Cineworld, which recently reported that, despite a gradual recovery of demand since re-opening in 2021, admission levels have remained below expectations.

3.41 Even before the pandemic, though, the leisure sector was challenged by the structural changes affecting retail businesses, with high street footfall in decline as consumers shopped online or at the most prime locations.

3.42 To that end, the food and beverage (F&B) sector, which for several years has been subject to high levels of competition and discounting, and over-supply in some locations, has seen many 'casual dining' chains downsize across the UK (e.g. Carluccio's, Jamie's Italian, Prezzo).

3.43 The sector remained relatively active throughout the pandemic, with takeaway and fast food outlets able to remain open. In March 2021, Just Eat reported that it had seen a 600% increase in orders in the first two months of the year compared to 2020. The momentum appears to have continued with the Local Data Company identifying takeaway and fast food outlets as the fastest-growing category with 293 net new openings across the UK in H1 2022; while bars, if grouped together with restaurant-bar concepts, have seen a net growth of 326 outlets over the same period.

3.44 Despite consumer demand for restaurants and bars remaining strong overall, there is a shift in demand for experience-based activities. Research conducted by OpenTable revealed that 78% of millennials prefer spending their money at a spot offering them a unique experience. Thus, more bars offering an additional entertainment element (such as darts, golf or table football) are appearing on the market. Some locations are also accommodating pop-up restaurants and/or street food traders.

3.45 Such soft leisure-based themed venues are a clear opportunity for Perth and some of the larger rural town centres. That said, the food and catering side of leisure is important in many of the places reviewed. Perth prides itself on a strong independent catering offer; it is also a strong food producing area.

3.46 In Catford, southeast London, the local authority has taken a lease on and converted an empty town centre shop unit into a one-screen cinema, plus gallery / exhibition / performance space. It has also provided three fitted-out street food kiosks available for short term let.

3.47 Following lockdown periods, many families have been keen to spend more time undertaking activities outside of the home. This has resulted in growing demand for family-focused experiences such as wall-to-wall trampolines, indoor climbing and soft play. Other concepts, which cater for a wider audience including groups and corporate events, include escape rooms, bungee towers and giant slides.

Office Market

3.48 Changes in the local office market are relevant to the future health of centres in the Perth and Kinross area, not least in terms of how post-pandemic working habits are influencing location strategy and space requirements. The following headline observations have been derived from the Employment Land Report prepared by Ryden for PKC:

<u>Office supply</u>

- *The total stock of offices in Perth & Kinross, including both occupied and vacant properties, is c. 1.61 million sq.ft. The office property market in Perth & Kinross is largely concentrated in and around Perth (90%) and the main towns of Blairgowrie, Kinross and Crieff.*
- *There is currently 226,029 sq.ft. of office space actively being marketed in Perth & Kinross, within 60 offices. This office supply has risen by 82% from 123,915 sq.ft. in 2017. The rise in office supply is primarily due to c 96,000 sq.ft. becoming available at Aviva's HQ at Pitheavlis in Perth* – located outside the City Centre close to the M90/A9 junction.
- *The current office supply equates to a floorspace vacancy rate of 14% (compared for example with 6% for Edinburgh as a major city office market).*

- Some 95% of the area's available office floorspace is focused in Perth, followed by Strathmore and the Glens (2%).

Office take-up

- *For each of the areas where take-up was recorded over the past 5.5 years the average annual take-up is:*
    - *Kinross: 910 sq.ft. in less than 1 office per annum*
    - *Perth: 56,006 sq.ft. in 22 offices*
    - *Strathearn: 642 sq.ft. in 1 office*
    - *Strathmore and the Glens: 627 sq.ft. in less than 1 office*
- Office floorspace take-up is down since the pandemic although, in office 'number' terms, take-up has remained broadly consistent with 2019 levels (suggesting smaller office sizes).

Location trends

- *Modern office space [built since 2000] is found mostly in out-of-town locations.*
- Offices in the area's city and town centres *are generally on upper floors and in older buildings*.
- *Major city office markets staged a [post-pandemic] recovery in 2021 and early 2022. Occupiers recognise the likely endurance of agile working and are adjusting their space requirements accordingly, but notwithstanding this are active in the market and laser focused on top quality space, ESG [Environmental, Social and Governance] credentials and future flexibility. As the office emerges as more of a corporate hub for many occupiers, there are signs of interest in flexible offices in smaller cities and regional and smaller towns, alongside home-working.*
- *...co-working hubs have opened in towns in the region. The spaces rent office desks / rooms / meeting rooms on a daily or short term basis, with a membership required. Examples include Can Do Crieff in Crieff, Dunkeld & Birnam Co-working Space in Dunkeld, and the soon to be opened Coupar Angus community hub. These have opened in refurbished buildings.*

Other potential changes and trends

- *It is understood that the Council is currently undertaking a review of its depots and also of its car parks. Although rationalisation is not necessarily the objective of these reviews, surplus land may be identified which could prove suitable for employment sites particularly in locations where the availability of land is scarce. Likewise, the portfolio of vacant and derelict land across Perth & Kinross may offer potential for redevelopment for employment uses.*
- Stakeholder consultation identified the trend towards public sector hubs, with *public sector (and potentially third sector) organisations withdrawing from the city centre or moving into shared premises this is likely to push up the office vacancy rates in Perth* and have implications for the vibrancy and vitality of the city centre, particularly the retail sector.
- Stakeholder consultation further observed that *some traditional office properties [are] being converted to residential in Perth*.

Summary

3.49 This section has provided an overview of the retail and leisure (and office) markets and discussed some of the key changes in those sectors prior to, and as a result of, the Covid-19 pandemic.

3.50 The market context and trends described above have a number of potential implications for centres in the Perth and Kinross area. Each centre will be affected in different ways: relevant factors include their respective size, function, composition of town centre uses, location and competition.

3.51 However, all centres are likely to face growing pressures and potentially business closures due to the cost of living crisis, labour shortages and supply chain issues. Some of the area's centres – including but not limited to Aberfeldy, Dunkeld & Birnam and Pitlochry Town Centres – may fare better than others due to their attractiveness to and reliance on tourists (including those from oversees who are likely to benefit from a weaker pound relative to the dollar).

3.52 Notwithstanding, future performance and recovery will much depend on how each centre adapts to future changes and remains relevant and attractive to shoppers and other town centre users. They will all, regardless of scale, need to be more multi-purpose in their offer, use and experience. It will be important to develop a policy response which considers how change can be supported and managed in the city and town centres to ensure their future vitality and viability.

4. City and Town Centre Reviews

4.1 In this section, we assess the health and vitality of city and town centres in the Perth and Kinross area.

4.2 Our reviews are ordered as follows:

- Perth City Centre (pages 31-39)
- Aberfeldy Town Centre (pages 40-46)
- Alyth Town Centre (pages 47-49)
- Auchterarder Town Centre (pages 50-57)
- Blairgowrie Town Centre (pages 58-64)
- Coupar Angus Town Centre (pages 65-67)
- Crieff Town Centre (pages 68-75)
- Dunkeld Town Centre (pages 76-80)
- Kinross Town Centre (pages 81-86)
- Pitlochry Town Centre (pages 87-94)

4.3 Each centre is assessed based on detailed site visits and place reviews in October 2022; in addition to the results of the survey of businesses in each centre, and the results of the new household survey (undertaken by NEMS Market Research in August/September 2022) in terms of customer's views and usage of Perth City Centre and the nine town centres. The tables included at Appendix A and B provide the main findings from the business survey and the household survey respectively.

4.4 Comparison to the previous 2016 Study[3] has been undertaken where appropriate. Whereas the 2016 Study contained separate sections – namely *Retail and leisure market in Perth & Kinross* and *Town centre health checks* – this report combines the two sections into one comprehensive section.

4.5 The reviews have been completed using a variety of key performance indicators, many of which are those identified in the Understanding Scottish Places (USP) town audit process. As with the 2016 Study the full breadth of performance indicators are well beyond the scope of this study. The study has selected a range of indicators, these are used at varying levels of detail, typically the summary level, as per the 2016 Study. The report format includes the indicators within themes / topics for each centre, rather than a series of staccato headings and one line points, for ease of reading and comprehension.

4.6 The range of performance indicators used are listed below, and followed by a brief explanation of the measures and sources for each performance indicator. Those indicators used in 2016 Study have been identified with an asterisk, to aid any comparison.

- **Pedestrian flows*** - a proven indicator of vitality, report uses available count information for Perth City Centre along with household survey responses on visit frequency and business feedback
- **Diversity of uses*** - report provides both written descriptions of offer and graphic tables / visuals
- **Quality of built environment*** - report provides brief descriptions for each centre as part of the reviews
- **Recent investment / proposed investment*** - report provides evidence of actual business investment from the reviews, and uses any planned investment information provided by the Council
- **Accessibility*** - report includes a written summary of vehicle, private, public and pedestrian access for each centre as part of the review
- **Attitudes and perceptions*** - the report extracts findings from the household and business surveys. These are presented within the findings commentary and as graphs where appropriate
- **Retailer representation*** - the report provides detailed descriptions of the offer for each centre, these are supported by graphical representation to aid understanding and comparison
- **Vacancy rates*** - these are detailed for each centre and are based on the detailed counts completed during the reviews

[3] Although it is noted that the town centres of Alyth, Coupar Angus and Dunkeld & Birnam were not previously assessed.

- **Leisure and cultural facilities, including evening economy*** - report provides brief descriptions for each centre as part of the reviews
- **Events / markets*** - report provides brief descriptions for each centre as part of the reviews
- **Crime and safety*** - report comments are based on the findings of the household and business surveys
- **Sense of place*** - report details the observations made during the place reviews combined with interpretation of the findings of household and business surveys
- **Business satisfaction** - this is an additional performance indicator, and is based on the findings of the business survey
- **Business outlook and intentions** - this is an additional performance indicator, and is based on the findings of the business survey
- **Visitor impact / benefit** - this is an additional performance indicator, and is based on the findings of the business survey

4.7 The report does not include rental levels and yields as a current performance indicator, primarily due to existing market conditions. Asking rents and the actual rents achieved are very different figures. Ryden in their recent 2022 Scottish Property Review (87th edition) stated:

'*Estimating prime city centre retail rents is challenging in this changing market context. Market evidence exists but it is very early to gauge the settled tones until the market comes back into some form of order and balance. New transactions are sporadic and often case-by-case rather than defining the town, city or mall tone. Generally, most occupiers will seek significant discounts on pre-pandemic rental levels.*'

4.8 If rental levels in major locations are difficult to quantify, then in smaller centres it will be even more so. The report has not therefore allocated valuable project resource to this measure. However, it is clearly the case that rental levels and yields have implications for investment and development viability, with low rents making new development more challenging and increasing the opportunities for PKC and its partners to intervene.

4.9 The study has also considered the findings and outputs of any locally produced Community Action Plans (CAPs) and independently produced 'Charrettes'. These are available for many of the centres included in the study. Where available they have been reviewed and referenced.

4.10 The centre reviews end with an assessment of the health and vitality of each centre, as well as the qualitative needs and issues that need addressing and the opportunities to improve the customer experience to help secure the future of each centre.

4.11 In the first instance, we provide an overview of the scale and composition of floorspace across the city/town centres assessed, including the degree of change since the 2016 Study insofar as possible. This analysis is reported in table form below (Figures 4.1 and 4.2) and is based on the latest data obtained from Experian Goad unless otherwise indicated. Graphs showing the percentage of floorspace dedicated to the various use categories are included in the relevant centre sections below.

4.12 Perth City Centre is shown to have experienced a notable contraction of retail floorspace since 2016; a trend reflected in some (but not all) of the other centres. It is perhaps surprising that non-retail floorspace, including services, has declined in most centres over the same period (excluding Perth City Centre and Pitlochry Town Centre), although a direct comparison is not possible given that Experian Goad has changed its approach to the categorisation of 'other' floorspace.

Figure 4.1 – Breakdown of retail and other floorspace in the city and town centres (2016 – 2022)

Floorspace composition –2016 - 2022)	Convenience Retail (sqm gross)		% change	Comparison Retail (sqm gross)		% change	Other incl. Services (sqm gross)		% change	Vacant (sqm gross)		% change	Total (sqm gross)		% change
	2016	**2022**		**2016**	**2022**		**2016**	**2022**		**2016**	**2022**		**2016**	**2022**	
Perth City Centre	7607	5769	-24%	55163	37152	-33%	77440	87124	13%	18470	21321	15%	158680	151367	-5%
Aberfeldy Town Centre	1680	580	-65%	2507	1570	-37%	3078	n/a		1639	n/a		8904	n/a	
Alyth Town Centre	n/a	680		n/a	330		n/a	n/a		n/a	n/a		n/a	n/a	
Auchterarder Town Centre	1630	1617	-1%	3030	3345	10%	6150	5983	-3%	320	762	138%	11130	11706	5%
Blairgowrie Town Centre	7268	6819	-6%	9502	8436	-11%	15120	14140	-6%	610	2146	252%	32500	31541	-3%
Coupar Angus Town Centre	458	240	-48%	417	320	-23%	1173	n/a		738	n/a		2786	n/a	
Crieff Town Centre	2850	3540	24%	5200	4970	-4%	10070	8872	-12%	3720	4422	19%	21840	21804	-0.2%
Dunkeld Town Centre	n/a	570		n/a	530		n/a	n/a		n/a	n/a		n/a	n/a	
Kinross Town Centre	950	1050	11%	1150	855	-26%	4640	4580	-1%	1250	687	-45%	7990	7172	-10%
Pitlochry Town Centre	2330	2127	-9%	5230	4664	-11%	12680	13592	7%	1480	2100	42%	21720	22483	4%

Notes: Experian Goad does not cover the smaller centres of Aberfeldy, Alyth, Coupar Angus and Dunkeld. The retail floorspace figures for these town centres have been estimated using ProMap.

Figure 4.2 – Breakdown of 'other' occupied / services floorspace in the main centres (2022)

Other occupied / services floorspace (2022)	Retail Services* (sqm gross)	Leisure Services (sqm gross)	Financial & Business Services (sqm gross)	Other** (sqm gross)
	2022	**2022**	**2022**	**2022**
Perth City Centre	9950	37105	7349	32720
Auchterarder Town Centre	1338	3530	232	883
Blairgowrie Town Centre	2471	6940	2397	2332
Crieff Town Centre	2183	2722	1310	2657
Kinross Town Centre	1161	1682	483	1254
Pitlochry Town Centre	465	9876	771	2481

Notes: Experian Goad does not cover the smaller centres of Aberfeldy, Alyth, Coupar Angus and Dunkeld.

**Retail Services include health & beauty, dry cleaners, opticians, post offices, clothing hire, etc.*

***The 'Other' category includes General Offices, Health & Medical Services, Industrial Activities, Public Services, Religious Services, Transport Services, Wholesale Trade, and Unclassified Buildings. Experian Goad does not provide a floorspace breakdown of these sub-categories, only a total sum.*

Perth City Centre

Overview

4.13 Perth is a popular city centre with the region's residents and tourists alike. It offers a fantastic setting beside the River Tay, Scotland's longest river, and has a skyline dominated by spires and the surrounding countryside. It was once the capital of Scotland and will soon be the resting place of the Stone of Destiny (formerly in Westminster and currently in Edinburgh). The stone will reside in the refurbished Perth City Hall.

4.14 Perth, known as 'The Fair City', is a compact city, with a strong reputation for its independent offer, education facilities, historic buildings, Museum and Art Gallery, concert hall and newly refurbished theatre, parks, events and other galleries and museums. The city and the surrounding county offer a wealth of tourist attractions, events, sporting and cultural activities for the residents and millions of visitors. The tourism and visitor offer continues to expand with the opening of the refurbished Perth City Hall as Perth Museum, which will house the relocated Stone of Destiny. Perth has also recently been added to the UNESCO Creative Cities Network, in recognition of its craft heritage and current offer.

4.15 Perth's easy access, by train, car, coach and even aeroplane (Edinburgh airport is only 45 minutes by car), combined with the variety and experience it offers is core to retaining its customer base and high visit frequency.

4.16 In regards the primary research data captured for Perth City Centre, 147 surveys were received from businesses either in or near the city centre, all via in person distribution. Note the business survey was completed in early 2022. Of the 1,013 respondents to the household survey, 425 residents said they use Perth City Centre most often for their shopping and service needs. Both surveys provide a very robust data set for analysis and interpretation.

4.17 Perth City Centre has not been the focus of a Charrette or CAP.

Accessibility and Environment

4.18 Perth sits at the junction of five major routes, M90 south to Edinburgh, A90 east to Dundee and east coast, A9 north to Inverness and north coast, A9 west to Stirling and the A85 to Oban and the west coast. The city centre has good access and plenty of available parking, all paid at varying rates per hour and beyond. There are several major car parks including Kinnoul Street (500 plus spaces), Canal Street (400 plus spaces), Thimblerow (200 plus spaces) and Scott Street (100 plus spaces) and a plethora of smaller space facilities both close to the city centre and within it. St Catherine's Retail Park (with its circa 650 spaces) immediately adjacent to the city centre does have free parking for limited periods.

4.19 The city centre has multiple bus stops and terminus at Mill Street and Murray Street, which also accommodates the cinema, theatre, concert hall and art gallery creating a 'cultural quarter' in offer rather than geographic district.

4.20 The train station sits to the south east of the main core city area, and is only a short walk from the city centre.

4.21 The overall environment of the city centre is positive, friendly and welcoming. The Council has and continues to invest in improving the public realm. The core High Street is pedestrianised and offers seating, street entertainment, and public art along its route. Many of the adjoining 'vennels' have seen investment in floor finishes, lighting and sense of place to attract customers to use them.

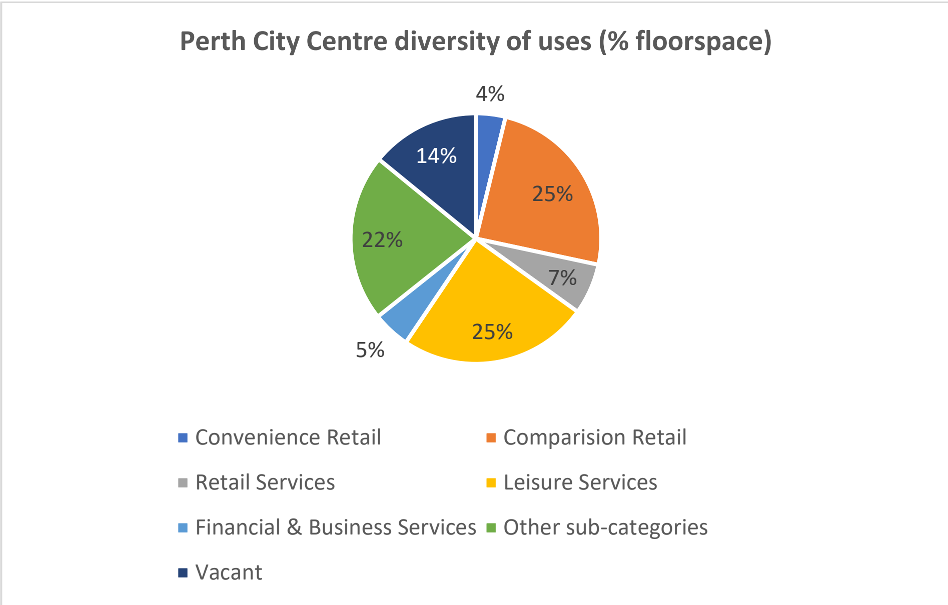
4.22 George Street and St. John Street are very pleasant places to take a stroll and enjoy the independent businesses. The area between King Edward Street and St John's Kirk, which will house the Stone of Destiny in the refurbished City Hall, will provide an appealing and high-quality area for eateries and pavement cafes, once all the works are completed.

4.23 South Street, York Place, County Place, the Methven Streets still need investment to bring them up to the standards of other parts of the city centre. The two major parks North and South Inch's do feel remote and cut off from the city core, and the river is not really integrated or taken advantage of as an attraction / asset for the city centre.

4.24 The ongoing Perth People and Place initiative is looking to improve connectivity and access to the City Centre, creating more sustainable travel routes between the rural areas, edge of city neighbourhoods and the core city centre. The initiative is also looking at enhancing the liveable neighbourhoods to create 20-minute neighbourhoods that achieve 'walk and wheel' return trips. This initiative will further improve the access to the city centre and local neighbourhoods.

Diversity of Uses and Retailer Representation

4.25 Experian Goad provide the following information regarding the Perth City Centre offer; total number of units as 658, gross total space 151,367 sqm., of which 37,152 sqm. gross comparison goods and 5,769 sqm. gross convenience floorspace. The graph below shows the diversity of retail uses, services, other sub-categories, and vacancies as a percentage of the total amount of floorspace.



4.26 The review process included a visual assessment of the city centre offer looking at the businesses operating on the principal trading streets of the city centre. The visual assessment does not account for unit sizes, focussing on the number of units to highlight mix and offer, however it does shine a light on the overall offer in the city centre.

4.27 The comparison goods offer is the single most dominant use circa with 115 units, followed by catering, services and hair /beauty all at circa 70 units each. The convenience offer is circa 35 units as is the public house offer. Cultural attractions are limited in number, however large in impact and size, at circa 8. The leisure offer is surprisingly limited, circa 7 units visible, including the cinema, theatre and gyms.

4.28 Vacancies account for circa 11.5% of the total number of units[4], at 75 units. There are a number of notable streets that have higher number of vacancies, this includes St Johns and core High Street area with 11 vacant units, including the former Debenhams department store. High Street to Thimblerow CP area with 12 vacant units. South Street with 11 vacancies, South Methven with 7 vacancies, and George Street with 7 vacancies. A number of the vacant units are both large spaces in high profile and visually dominant places. It is interesting that visitors have identified empty units as an issue in the household survey, and businesses have a clear demand for an increased offer.

4.29 PKC has an active support programme to assist with the repurposing and improved occupancy of vacant properties as part of the Vacant Properties Development initiative. This provides a variety of support from grants, feasibility studies and access to funding streams (such as Heritage Funds and Open for

[4] The most recent Experian Goad survey of May 2022 identified a floorspace vacancy rate of 14%.

Business funding). PKC has a proven track record of addressing vacant properties, and this is anticipated to continue.

4.30 The catering offer is a strength for the city centre, with many established independent operators across all day parts. The café and coffee shop offer is good with a wide spectrum from traditional to the more contemporary operators. Many of the national multiple family and fast casual catering brands are not in Perth at the moment, other than the essential basic providers, and this is an area for an improved offer.

4.31 The services and health / beauty offer is well catered for with operators on all the main shopping streets.

4.32 The convenience offer is limited to small scale branded and local convenience / specialist operators, the quality ranges from the value and basic end of the offer to a few better quality specialists. The offer is most likely to be found on South Street (including Tesco Express), South Methven Street and Scott Street. Sainsbury's Local and M&S Foodhall are also on High Street.

4.33 Unsurprisingly for a city centre, Perth does have a wide ranging multiple retailer offer including M&S, Primark, Next, Boots, WH Smith, Superdrug, The Body Shop, Holland and Barrett, Clarks, Waterstones, Poundland, White Stuff, Crew Clothing, Jo Jo Maman Bebe and Rohan, to name but a few. Perth has also suffered from the closure / collapse of many national brands, leaving a number of large vacant units in the city centre, such as Debenhams and Beales. The 2017 retail strategy study completed for Perth City Centre did identify many missing national operators and, whilst this was pre covid there remains many appropriate businesses without representation in Perth.

4.34 In addition to the city centre boundary area offer, St Catherine's Retail Park, and linked parks, offers a wide range of national multiple brands in larger edge of town retail park environment. Brand names include The Range, Halfords, Home Bargains, Pagazzi, Dunelm, Curry's, Gym Group, Sports Direct, TK Maxx and Dreams. It has direct car access, easy parking and supporting branded food offers. The circa 26 units are adjacent to the city centre but not part of it (apart from a few situated between the Canal and Barrack Street).

4.35 Unsurprisingly as the major centre in the study, and one of Scotland's premier destination cities, Perth does offer a multi-purpose visit experience. There is a strong line up of comparison goods operators (despite the closure of national businesses) and a good hospitality sector, with good independent operators. It has a large services and beauty offer. The convenience offer could be stronger, given the visit frequency; as could the leisure offer. The cultural offers need to be better integrated and used as a catalyst for footfall and visits. The breadth of the independent offer in all categories is an asset for the city and a recognised strength.

Customer Behaviour and Views

4.36 The views of customers are based on a robust sample of 425 residents who use Perth City Centre as their main shopping destination. The businesses views and opinions are also based on a strong data set of 147 respondents (the Perth City Centre business survey was completed in early 2022).

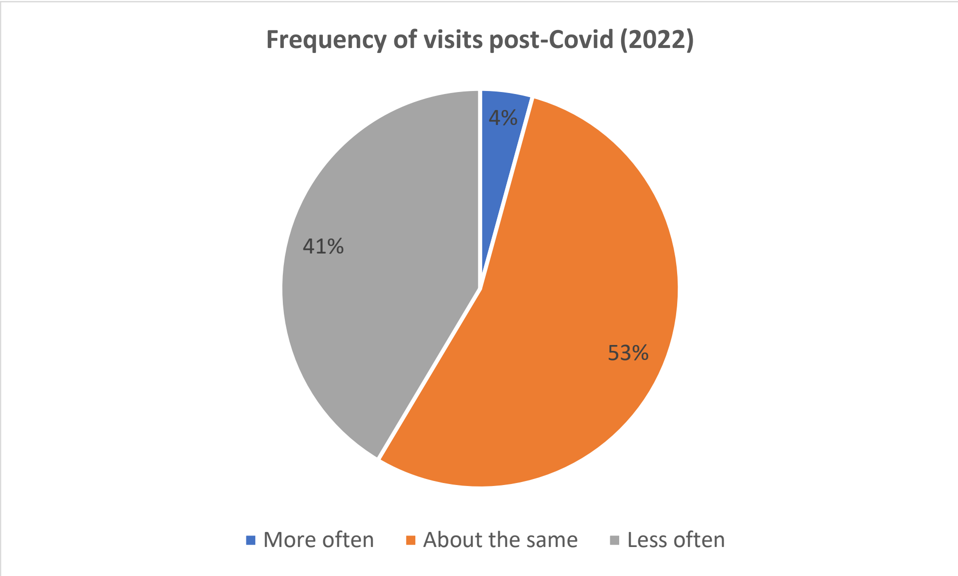
4.37 In terms of general visit frequency, 54% of visits are at least weekly, with circa a third being multiple visits per week. Around a third of residents in the survey visit monthly or a few times per month. For most (53%) this is in line with pre Covid frequency, although 41% are visiting less. The preferred method of travel is by car, with 75% either driving or being a passenger (up on 2016, 62%). 11% walk into the city, as do bus travellers (11%). Note bus usage has halved from 2016, while the survey research indicates almost no train usage for access to shopping.

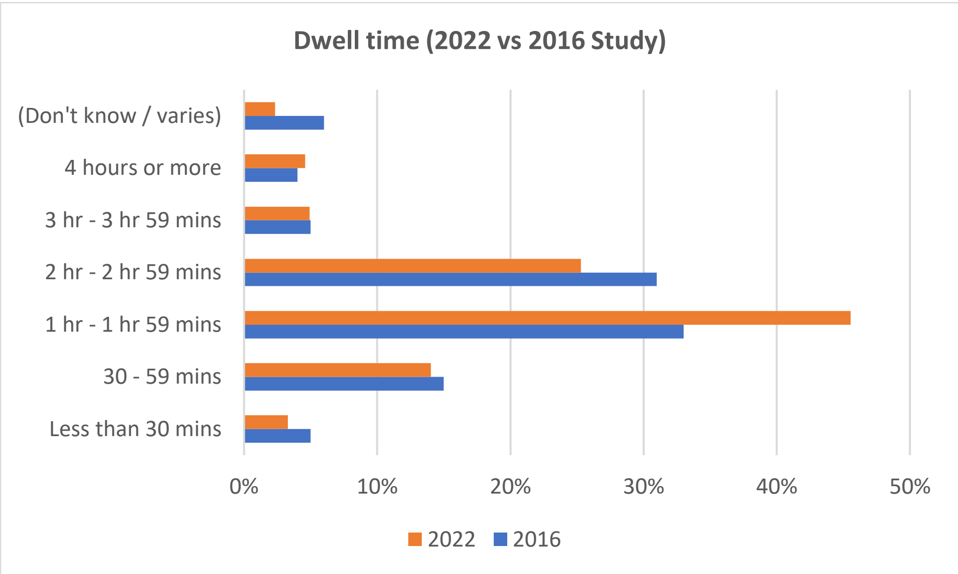
4.38 Dwell times in the city are typically 1-2 hours, 46% (2016, 33%), or 2-3 hours 25% (31% in 2016). Other visits tend to be shorter in duration. Reasons for visiting Perth are focussed around 'non-food shopping' 53%, food shopping 50%, visiting cafes and restaurants 39%, and these are similar drivers to 2016. Window shopping has almost halved from 24% in 2016 to 13% now.

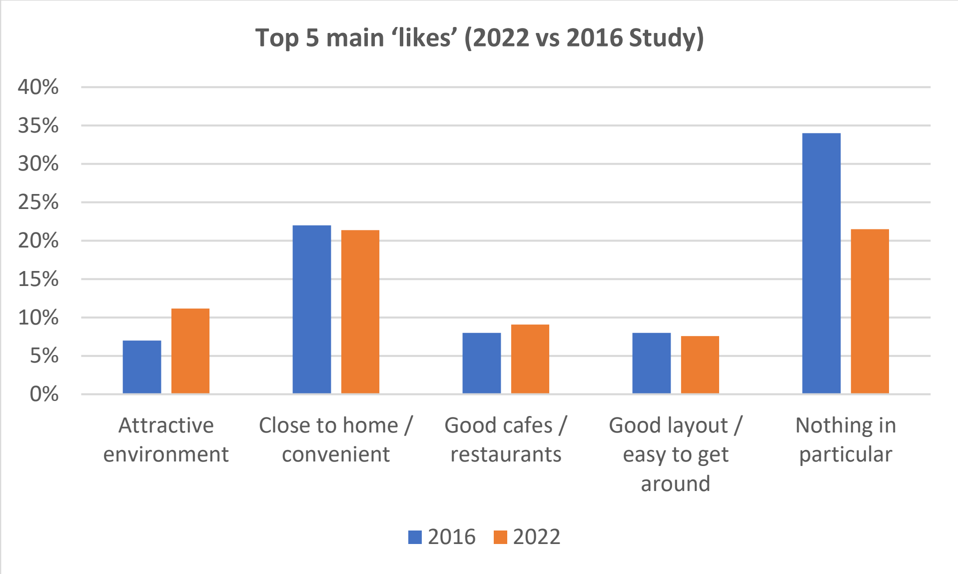
4.39 Visitors like that the centre is close to home / convenient (21%), attractive (11%), good cafes (9%) and easy to use (8%). These are all at similar levels to 2016. Desired improvements are all about the offer and more shops (22%), more 'high street' retailers (17%), more independents (12%) and more clothes shops (10%). Again, all in line with 2016. Visitors have also flagged fewer empty shops (11%, not registered in 2016). In 2016 15% wanted more / cheaper parking, yet this response is not registered in the current survey.

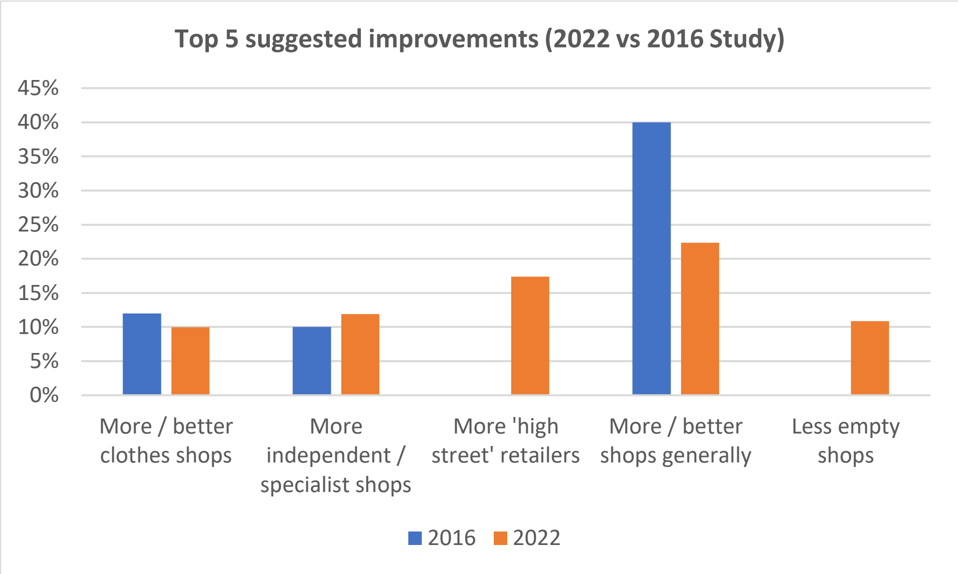
4.40 Evening visit frequency is 26% weekly, 10% monthly, 24% less often and 39% never. In 2016 it was 9% weekly, 19% monthly, 23% less often and 46% never. Quite a change in pattern, to more frequent evening usage. Reasons for visiting are driven by cafes / restaurants at 42% (2016 58%), cinema / theatre 28% (2016 34%). In 2016 events were a significant attraction, 21%, Covid will have reduced those in short term hence this type of attraction is not registered this time. Improvements were only identified by a small percentage, mainly more eateries 12% and then more events 8%.

4.41 We have selected some key findings from the household survey research and present these in the graphs below. They are focused on customers' frequency of centre visits post-Covid; average dwell time; the top 5 main 'likes' about the centre; and the top 5 suggested improvements to encourage them to visit the centre more often.









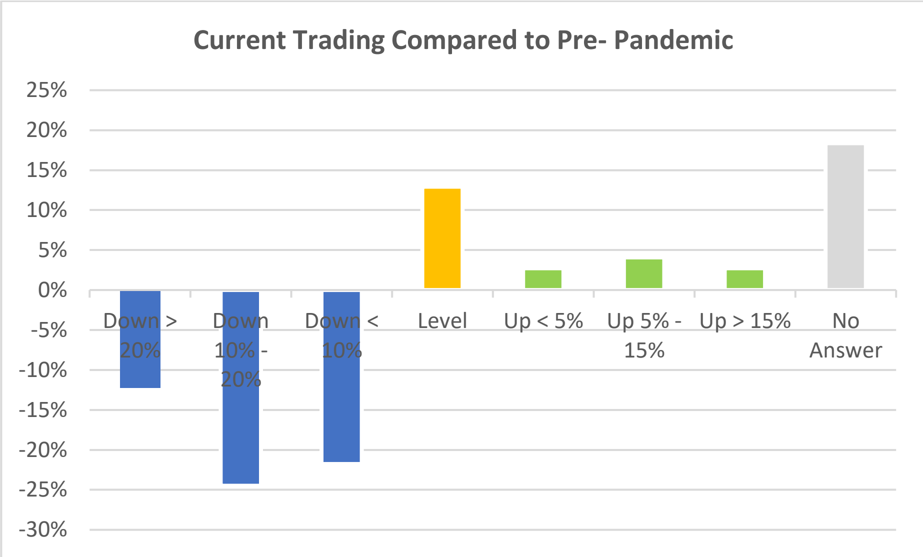
4.42 In terms of tourism and visitors to Perth, the study has looked at the latest (2021) STEAM Tourism Report headline statistics. These show that Perth & Kinross received circa 1.25m tourism visits in 2021. This is almost 50% up on 2020, but still 48% down on pre covid. Not all of these visitors will go to Perth city centre, but many will. The year on year growth is a strong positive indicator. Visitors are proven to be spenders on hospitality, leisure, catering, retail and services: shopping £51m, food and drink £45m, recreation £17m. Businesses identify visitors as an important customer group and are clearly in the need to attract more of them, more often, to Perth city centre.

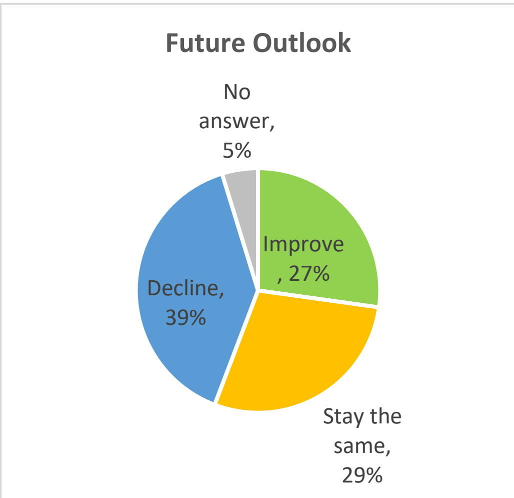
4.43 The range of visitor and tourism attractions is soon to benefit from a new, large attraction with the opening of the Perth Museum (after £26.5m investment) in the former Perth City Hall. This will include the relocated Stone of Destiny. It is anticipated that the new Museum will attract an additional 162,000 additional visitors by 2027/28. Furthermore the announcement of Perth City Centre joining the UNESCO Creative Cities Network, in recognition of the current and historic extensive craft skills, will further increase visitors to the city and surrounding areas.

4.44 Businesses identify their customer groups as including local residents (92%), tourists / visitors (77%), local workers (71%) and people passing through (66%). 44% of business report customer numbers as being similar or above previous year, and 50% say they are decreasing.

4.45 Businesses identify a variety of trip generators, with live nearby (87%) and work nearby (77%) dominating. Socialising (62%) and using hospitality (47%) are also key reasons, as are events (49%). Shopping in general, using specific shops, visiting markets and the environment all identified by circa 30% of businesses.

4.46 The graphs below are based on the findings of the business survey. They show the performance of businesses compared to pre-pandemic trading; the business outlook; and the degree to which businesses would recommend the location as a place to trade. (Note the earlier Perth City Centre business survey did not include a question regarding importance of tourists / visitors, this will be included in future surveys).





Indicators of Vitality and Viability

4.47 Perth City Centre would appear to be in mixed health on many measures identified in the review. Vacancy levels are fairly considerable with 11.5% of units vacant based on the review. There is some visual evidence of businesses investing in their units, and relocating to new locations. The current trading and outlook reported by businesses has both strong indicators and negative responses.

4.48 34% of businesses in the survey had been trading for less than 5 years. 47% for over 10 years. This demonstrates that Perth is attracting new businesses and investment, whilst having a strong core of businesses that continue to trade in the city centre. Several units had recent improved fit outs and businesses had good levels of shop fit and display.

4.49 Most operators (53%) are satisfied with the current performance of their business, only 19% dissatisfied. They are less satisfied with the overall performance of the city centre: 38% satisfied, 32% dissatisfied. 40% of businesses expect business to stay the same or improve, and 56% anticipate declining sales.

4.50 In regards current trading compared to previous year, about a quarter are up, 22% are level and circa half are trading down. 77% expect to remain in their current premises and 17% are planning to adapt their businesses. 7% said they expected to close.

4.51 Businesses overwhelmingly felt that Perth needed more choice and variety (87%), that it is clean and pleasant (55%), circa a quarter would not recommend it is a place to trade. Customer spend is level or increasing for circa half of businesses and down for a quarter.

4.52 Footfall in the city centre is monitored by Springboard, with two camera count points located on High Street and St John Street. Springboard produce monthly reports and for the purpose of this report, the October 2022 report has been used. The following points are extracted:

- Footfall in the core city centre is on an improving trend, with 21.2% increase on last year (ytd).
- Current monthly figures are circa 245,000, with peak day of circa 13,000.
- Pre covid levels were typically circa 310,000 with large variances by month.
- Compared to pre covid (2019) Springboard report -22.6% for October, although the last week of month was only -10.3%. Saturdays seem to have the largest shortfall, indicating destination shoppers are continuing to be wary of returning to the city centre.
- Whilst footfall is improving it is yet to return to pre covid levels, that said circa 245,000 passing consumers per month is a good target for all businesses.

Identified Issues and Improvements

4.53 The following table provides a SWOT analysis for Perth City Centre going forward.

Figure 4.3 – Perth City Centre SWOT

Strengths	**Weaknesses**
Proven mix of customer groups using the city centre	Limited leisure offer
Multi-purpose city centre offering a cinema, arts, culture, shops, catering, services	Poorly integrated adjoining retail parks
Number and variety of service providers and health and beauty providers	Poorly integrated river, parks and wider city centre components
Independent retailers	Visible vacant units
Independent catering and hospitality providers	High profile visible vacant units in core high street area, and other clusters of vacant units
River frontage and connectivity to rural hinterland	Business satisfaction with city centre performance
History and heritage, cultural and arts attractions	Numbers of beggars, street drinkers, rough sleepers and wider ASB issues
Programme of activity at concert hall and art gallery	Large number of businesses trading down year on year
Ease of access, city centre parking facilities	Integration and connectivity with other city centre and outlying assets (promotion not physical routes)
Business satisfaction with own performance	Lack of promotion of new businesses
Markets offer and seasonal markets	Limited visible new business opening activity
Floral displays, baskets (77% ok / good in business survey)	Physical / public realm away from core areas
Public realm, environment, lighting	
Residents view the quality of shops as average 61% or good 20%	
Parking availability is rated 75% average or good	

Public transport is rated as 61% average or good	
High visit frequency for a city centre location	
Stable or increased spend per visit	
Regular monitoring of performance and business trading issues	
Increasing footfall trend, not yet at pre covid levels	
Number and variety of car parks	
Pro-active approach, plans, support for vacant property	
Opportunities	**Threats**
Need to attract more leisure day visitors, business visitors and students into the city centre, as identified by city centre businesses	Strong and improving retail parks adjacent to city centre
Improve the parking facilities, promotion, pricing and condition (71% needs improving in business survey)	Declining customer numbers, visit frequency
Promote city centre in entirety to change perception (66%)	Challenging outlook for many businesses
Provide business support to help businesses adapt (65% needs improving in business survey)	Ongoing vacancies in prominent locations
Increase number and range of markets and events	Dependence on car borne visitors
Residents view the offer as either average 44% or poor 43%, improve offer and promote	Continued reduced visits post Covid, slow 'bounceback'
Residents view the environment as average 52%, poor and good are equal at circa 25%. Improve environment and promote	Pressures on Council budgets for ongoing public realm improvements
Increase the dwell time for longer periods, improve connectivity and drive linked trips	Lack of awareness across 'retail' sector of Perth's potential and opportunities
Improve the city centre convenience goods offer	Changes to access and transport modes as a result of ongoing place-making and city centre development may impact on footfall routes and micro access to certain areas
Improve the diversity of reasons to visit the city centre, improve connectivity to river and outlying parks, through stronger signage and clear routing	Potential for further national retailer closures impacting on Perth's offer
Build on increase visitors numbers resulting from additional attractions	
Improve city centre leisure offer, target missing components (e.g. indoor golf, climbing, themed hospitality)	
Improve appearance of non-core streets to match that of core areas	
Utilise the Perth People and Place initiative to increase visits via all access and 'transport' methods	
Improve retail offer as requested by businesses and customers	
Fill empty / vacant units, repurpose to meet future customer need	
Build on perceived strength as a catering, hospitality, food destination	
Secure more new businesses into city centre and promote their imminent arrival, recent opening and post opening success	
Continued monitoring of city centre performance to direct activity	

Healthcheck Summary

4.54 Despite the long list of strengths and opportunities in the SWOT summary, Perth City Centre is currently facing many of the challenges seen in places across the country. In some parts of the city centre it is not as healthy as it could and should be. Whilst many parts of the city centre are in a good place and it has many positive indicators, there are a number of aspects that provide concern. The appearance and number of large visible vacant units in the core pedestrianised part of the city centre, as a result of national failures / strategic trading decisions, is one aspect. Similarly, the clusters of vacant units on a number of other of the main city centre streets also provide indicators that there needs to be continued pro-active work to fill / repurpose historic retail units, and / or reduce the number of designated retail units. PKC will need to complete, continue or start to undertake an 'opportunities and needs' assessment for the large vacant buildings – including those considered in section 10 of this report – to identify the optimum future uses for them. This should include engaging with the site owners and other stakeholders to identify suitable and viable options. There are many examples of successful repurposing of large in centre units, to other retail uses as well as leisure, hospitality, residential, employment and commercial uses. The key is to identify what is missing from the city centre and then explore options for the vacant spaces.

4.55 However, there are many positive aspects to build on; businesses are generally satisfied with their own performance, even if sales are down year on year. Whilst post covid visit frequency is down, over half of residents are visiting at the same rate as pre Covid. Some businesses report increased transaction values. Footfall levels are improving and getting close to pre pandemic levels.

4.56 Perth is ideally suited to capitalise on many of the emerging retail, customer and place trends identified earlier in the report. The visitor and leisure shopper is looking for more experiences and as considered, whilst Perth already continues to bring forward attractions, it can add even more experienced-based leisure, hospitality and catering offers to the city centre. The strength of the independent offer is a major asset to build on, while a stronger visitor destination retail offer would be an asset for the city, as part of linking the retail to other city amenities. We have also identified a qualitative need to improve the city centre convenience goods offer.

4.57 Perth has plenty of opportunities to improve its health and vitality, some of the initiatives already completed are having a positive impact and recognition with visitors and businesses. These need to be built on and expanded. The numbers of strengths and opportunities listed above significantly outweigh the weaknesses and issues. Many of the strengths are physical and long term. This indicates that whilst it might be challenging now for Perth, the outlook (with some proactive initiatives) is a lot healthier, providing opportunities to improve are taken and implemented.

4.58 Based on the findings of the healthcheck and performance indicators review Perth city centre needs to attract new, additional and different businesses for its existing / historic retail spaces. Whilst these new occupiers will include 'retail' in the traditional sense, it is likely that they will also include more catering, more leisure, more hospitality, service providers and hybrid operators providing a mix of these offers. The existing work already completed and continuing on improving the public realm, cultural and visitor attractions will be important to recapture both lost local and wider tourist visitors. Both are returning but need further catalyst to improve the rate of return.

Aberfeldy Town Centre

Overview

4.59 Aberfeldy is a Burgh in Perth and Kinross, with a population of circa 2,000 residents. It is a pleasant market town (there is still a monthly farmers market on the first Sunday of the month) that sits beside a large bend in the River Tay. The town provides a base for visitors to many of the surrounding rural and historic attractions.

4.60 Aberfeldy is an adjunct and mid-point between the busy tourist route along the A9 and the popular Loch Tay, with its busy water sports attractions and surrounding countryside active sports and pursuits facilities, including Loch Tay and Highland Safaris.

4.61 Aberfeldy is reputed to have been first made famous as the setting for a famous Robert Burns poem, The Birks of Aberfeldy which references the many Birch trees in the area and a popular circular walk. Indeed, the town centre has a small park area called the Birks, and the recently renovated cinema takes its name from the poem as well. The town is also the home of the famous regiment The Black Watch, with Bonnie Prince Charlie, The Jacobites and General Wade all providing further history intersections and access points for the area.

4.62 The town benefits from the large Victoria Park, a couple of golf courses, numerous nearby attractions, including the Dewar's Distillery, local active leisure facilities and is host to a variety of different holiday accommodation options.

4.63 In regards the primary research data captured for Aberfeldy, 23 surveys were received from businesses either in or near the town centre (21 via face-to-face survey and 2 online) and of the 1,013 respondents to the household survey, only 30 residents said they use it most often for their shopping and service needs.

4.64 The study has also looked at the Charrette produced for the town in 2015, this being one of a series completed across Perth and Kinross by a team of specialists. The aims were to identify potential physical and placemaking interventions for the town centre (not an overall regeneration strategy). The Charrette is a grounded report and includes engagement with local community and community groups. It identified strengths as independent shops, parks, the Square and surrounding countryside. Weaknesses included parking, scruffy / car dominated centre and poor arrival. Improvements identified included improving the public realm, increasing attraction to tourists and visitors, enhancing existing assets, improving connection to surrounding countryside and visitor attractions, and addressing the large dominant vacant unit (now occupied). Much of the report's ambitions remain relevant and pertinent to the town as can be seen from the healthcheck.

Accessibility and Environment

4.65 Aberfeldy is on the A827 which connects to the A9, south of Pitlochry and north of Dunkeld. The A827 connects the A9 to Loch Tay and onto the A85. The town's railway station and line closed in 1965 as part the Beeching Report.

4.66 The town is easily accessed by car, bus and on foot. There is a bus stop on Chapel Street that has many bus routes stopping at it, offering services to Perth, Crieff, Blairgowrie and other local towns. Parking is limited to on street parking, a couple of small car parks, and to the main car park (38 spaces) behind the Co-op foodstore where parking is free for two hours.

4.67 Pedestrian access is easy with good pavements and crossing points. The town centre has a pleasant environment, a clear central 'square' albeit with the main road passing through it. There are plenty of seats, flowers in planters and baskets. The town feels clean and friendly / welcoming. The quality of the built environment is pretty good, with a few notable exceptions. The signage to other attractions within the town could be improved. Victoria Park and its facilities barely get a mention.

Diversity of Uses and Retailer Representation

4.68 Aberfeldy's town centre offer consists of circa 76 retail / commercial units in total based on the visual review. The vast majority are local independents or regional businesses, The Original Factory Shop, Premier convenience store and Co-op being in the minority of national brands. Davidsons pharmacy is a regional multiple. The review identified only 4 vacant units / non active, equating to 5% of the town centre.

4.69 The convenience food offer is limited in number with 6 units, although the Co-op foodstore is the largest unit in the town centre. It is a reasonable size food store for the town. There is also a smaller branded convenience store (Premier) and a butcher, plus a baker. The daytime food / catering offer is good, with several food styles and price points available. The evening offer is also reasonable with 3 pubs, and Italian, Chinese and Indian restaurants. The larger hotels also offer a food service.

4.70 The service offer is extensive with circa 20 operators, 5 of which are hair and beauty alone, and there is a good cross-section of other service providers including pharmacy, optometrist, launderettes, estate agents and PC repair shop.

4.71 The comparison goods offer is also good at 19 operators, providing a good mix of gift, clothing and general merchandise stores, as would be expected for a rural market town such as Aberfeldy. Many of these retailers are also appealing to the visitors. The market, a farmers' market, is located on the town square, outside Birks Cinema.

4.72 Other uses in the town centre include three hotels / large B&B facilities, the Birks Cinema, a small number of offices, several residential units and a small number of take-away only businesses (3).

4.73 For a town of its size, Aberfeldy is already offering a multipurpose visit location.

4.74 Experian Goad do not have floorspace data for Aberfeldy, however based on the observations of the place review and using measurements from ProMap, CPW Planning has estimated the comparison floorspace to be 1,570 sqm. and the convenience floorspace to be 580 sqm.

Customer Behaviour and Views

4.75 According to the 23 businesses that returned surveys in Aberfeldy Town Centre, their customers are mainly local residents (92% of businesses said this), tourists / visitors (70%), people passing through (61%) and local workers (52%).

4.76 According to customers who state they use Aberfeldy as their first-choice centre for shop and services, two thirds (68%) travel by car (and ap41Prox. one third walk). This is different from 2016, when 42% drove and 57% walked. There is quite a spread of dwell times in the town from less than 30 minutes to up to 3 hours, 30% stay for 1 – 2 hours (up on 2016 22%). 18% stay for less than 30 minutes well down on 35% in 2016. 30 minutes to an hour also has 18% of visits. This further confirms Aberfeldy is a multi-purpose centre.

4.77 Customers are mainly using the food (75%, in line with 2016), non-food shopping 57% (up from 32% in 2016), health services (25%) and cafes / restaurants 24% (both of which didn't feature in 2016).

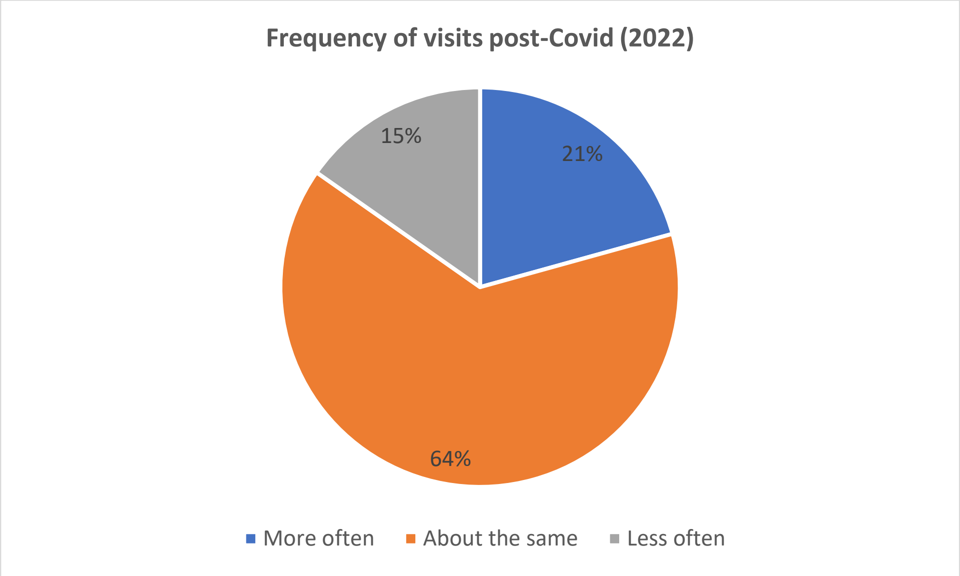
4.78 The customer frequency of visit is very mixed, with daily (11%) and weekly (19%), monthly (15%) and less often (22%) all being stated. Since Covid, 64% are visiting at the same frequency, 21% visiting more often, and only 15% visiting less often. Being close to home / convenient (46%), friendly (19%) and nice environment (17%) are all likes about the centre; the same three likes were identified in 2016 albeit environment was the lead 'like' at 56% then. Desired improvements during the day include easier to park (26%), while most people (56%) said nothing in particular. With regards to suggested evening improvements, 72% cited nothing in particular and a quarter said more cafes and restaurants.

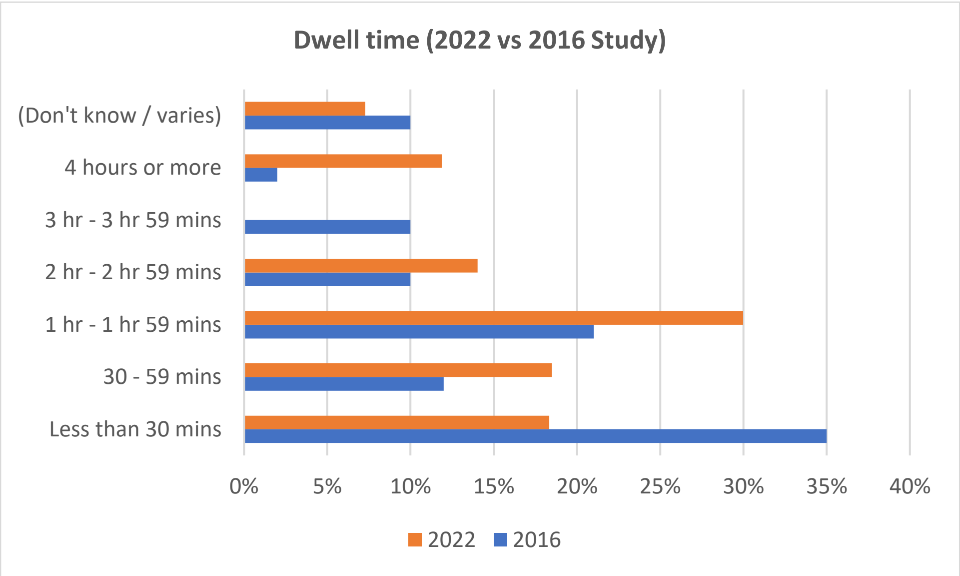
4.79 There is no available footfall information for Aberfeldy, however the visit frequency, customer and business trend information would indicate that footfall levels are close to if not at pre covid levels.

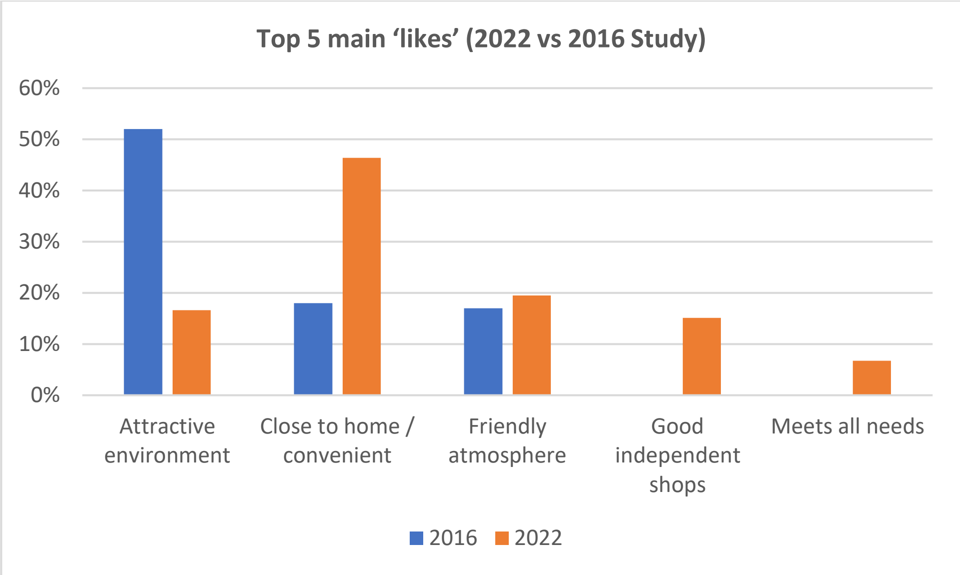
4.80 The evening visits are less frequent than daytime, with over 60% saying they don't visit in evenings, Those that do tend to visit monthly, a change to 2016 when a quarter didn't visit and a third visited weekly. Reasons for evening visits are dominated by the cinema (63%) which was not registered in 2016, followed by visiting eateries (37%) and pubs (34%) similar to 2016.

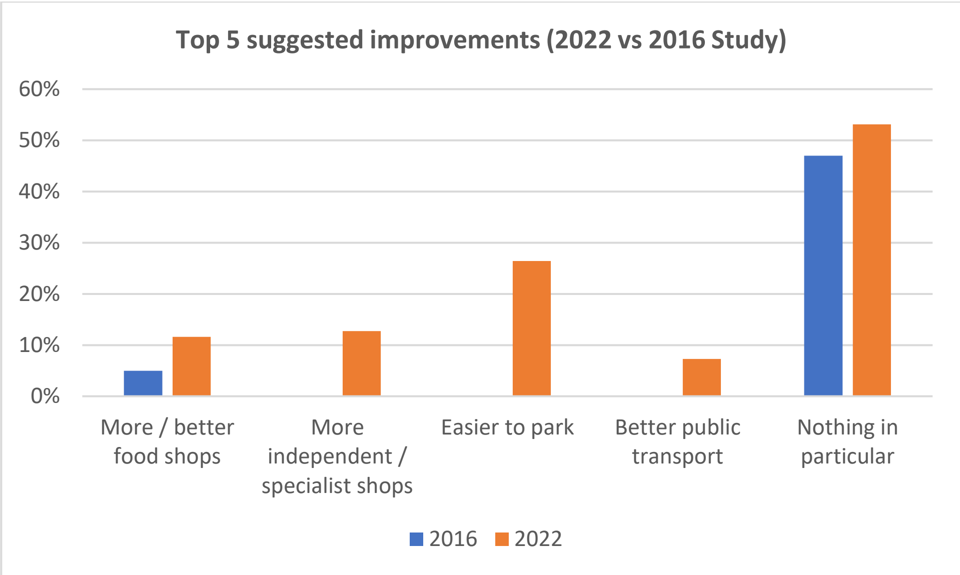
4.81 We have selected some key findings from the household survey research and present these in the graphs below. They are focused on customers' frequency of centre visits post-Covid; average dwell time; the top

5 main ‘likes’ about the centre; and the top 5 suggested improvements to encourage them to visit the centre more often.

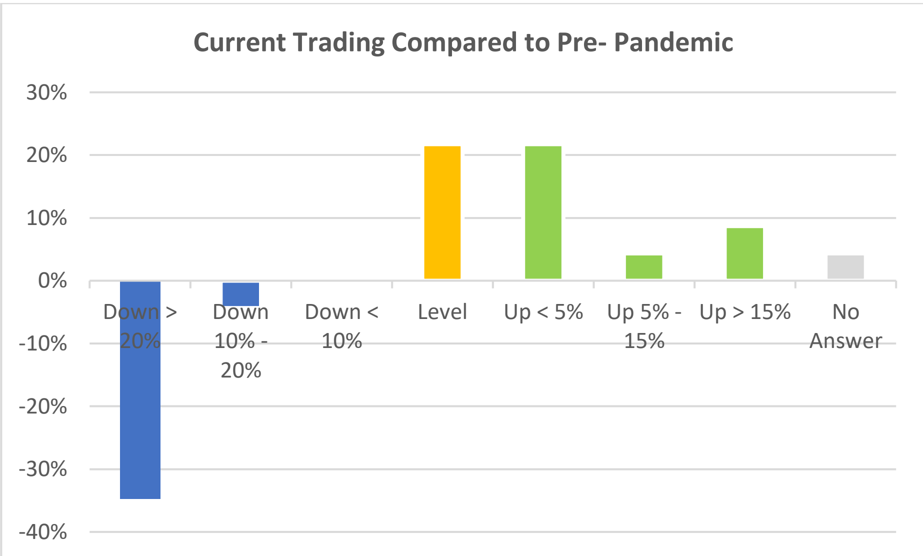


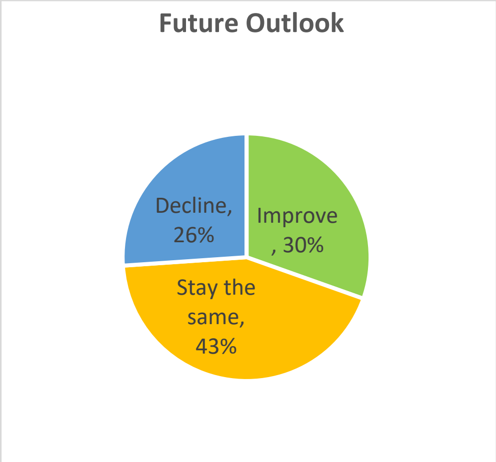


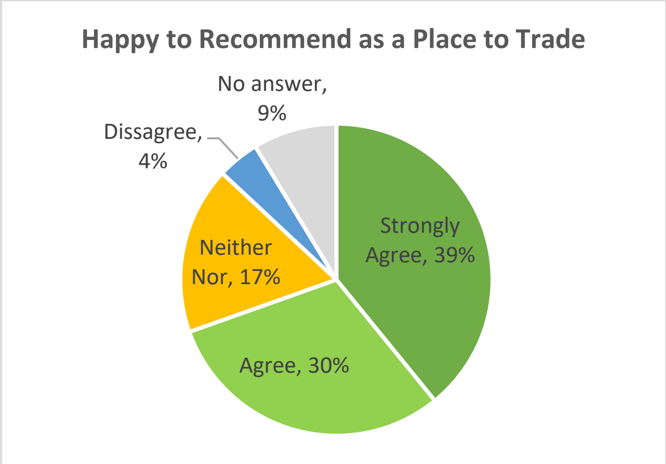


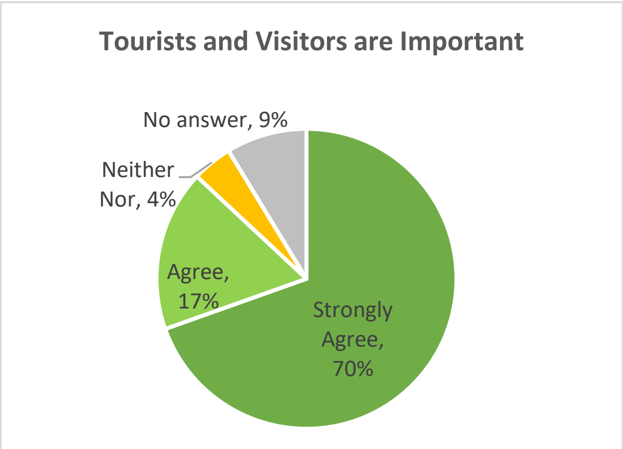


4.82 The graphs below are based on the findings of the business survey. They show the performance of businesses compared to pre-pandemic trading; the business outlook; the degree to which businesses would recommend the location as a place to trade; and the importance of visitors to the centre.









Indicators of Vitality and Viability

4.83 Aberfeldy would appear to be in good health on many measures. Vacancy levels are low based on the review with only 5% of units vacant. There is clear visual evidence of businesses investing in their units. Many units had recent improved fit outs and businesses had good levels of shop fit and display. Many of the businesses are long term and established with 75% having traded for over 10 years, while 26% of businesses in the survey had been trading for less than 5 years.

4.84 According to businesses, most of their customers are visiting at the same frequency or more often since pre Covid (85%) with a few visiting less (15%).

4.85 Most operators (60%) are satisfied with the current performance of their business, only 4% dissatisfied, and a similar amount (70%) are satisfied with the performance of Aberfeldy as a place to trade. Three quarters of businesses expect business to stay the same or improve, only a quarter anticipate declining sales.

4.86 In regards current versus pre Covid trading, about a third of businesses are up, 22% are level and a third are down. 70% expect to remain in their current premises and 44% are planning to adapt their businesses or expand the range of merchandise offered (20%). Only two said they expected to close.

4.87 Businesses overwhelmingly would recommend Aberfeldy as a place to trade (70%). One third are concerned about future trading prospects and two thirds are not concerned. The vast majority (87%) agree that tourists are important for the town; almost 40% said they account for between 20% and 50% of turnover.

Identified Issues and Improvements

4.88 The following table provides a SWOT analysis for Aberfeldy Town Centre going forward.

Figure 4.4 – Aberfeldy Town Centre SWOT

Strengths	**Weaknesses**
Variety of reasons for customers to visit and use the town centre	Limited parking, receives a high 'poor' rating in survey
Town centre environment is positive; well maintained and tidy	Limited public transport, receives a high 'poor' rating in survey
Good mix of retail categories including food, non-food, services and catering	Poor integration of Victoria Park and its facilities
Town centre environment is clean	Lack of pro-active promotion of nearby attractions, in the town
There is evident civic pride visible, especially the seating, planting and flower displays	Profile of national multiple operators is out of sync with rest of town
Easy access and connectivity to surrounding attractions	
Strong services offer indicates good footfall	
Good mix of local and regional independent businesses	
Proximity to River Tay and Loch Tay	
In town cinema	
Positive rating of choice and quality of shops	
High 'satisfaction' ratings for town by businesses	
Tourist information centre and staff	
Existing Aberfeldy Small Business Association	
Opportunities	**Threats**
The businesses would like to see more cultural attractions (35%), more events (35%) and more leisure facilities (39%)	Tourism and visitors are important to the local community / business community, external impacts on visitor numbers. Reduced marketing activity by surrounding attractions
Encourage private landlords on the High Street to invest in their properties, to bring them up to the standard of others	Closure of surrounding attractions due to cost of operating and utilities
Businesses would like to see improvements to a number of customer experience aspects, including parking (70%), toilets (70%), pavements and cleaning standards	Competing centres being viewed as easier to use / access / park in
Promote the monthly farmers market in the town centre	
Build on the occasional existing market offer, add more themed markets	
Make more of the history and heritage within the town centre, these are published and online, but not featured as part of the towns offer	
Embrace the nearby tourist destinations – run joint information & promotional campaigns	
Improve the pedestrian access to town centre (2016 was much higher)	
Improve connectivity and links to Victoria Park and The Birks circular walk	
Identify opportunities for additional visitor parking and overflow shopper parking	
Create a stronger sense of place for town square, signage, welcome, seating	
Provide support to businesses who are looking to adapt	

Healthcheck Summary

4.89 Aberfeldy would appear to be in a good position and in reasonable health when considering the findings of the household survey, business survey and objective place review. Businesses are broadly satisfied with it as a place to be doing business. Customers like to use it and use it for a variety of reasons. The strengths and opportunities clearly outweigh the weaknesses and threats.

4.90 Whilst the offer is improving, there are no obvious large scale development sites that would trigger a significant change in the mix, offer and uses of the town. The large hotel in the middle of the town occupies a large plot, but it only needs a makeover and tidy up, not replacing. Change and improvement will happen as units become available and this should be encouraged, whilst maintaining the broad mix of offer and reasons to visit. Further convenience, catering, services, leisure offers in the town centre will increase local visits and provide more services for visitors. This is in line with the evolving place and consumer trends and should be supported. Additional visitor focussed businesses will be a positive addition for the town centre.

Alyth Town Centre

Overview

4.91 Alyth is a small town located 18 miles (34 minutes' drive) to the north west of Dundee, and 22 miles (42 minutes' drive) to the north east of Perth, while it is only 15 minutes' drive to Blairgowrie. The estimated population, as detailed in the latest CAP, is circa 3,000 residents.

4.92 Alyth historically has performed the role of a staging post and market town, plus centre of textile manufacturing in the 18 and 19 centuries. More recently it has become a commuter town for Dundee and Perth, plus a centre of commerce for local residents as well as satisfying the needs of tourists and visitors to the area.

4.93 In regards the primary research data captured for Alyth, 5 surveys were received from businesses either in or near the town centre (4 via face-to-face survey and 1 online) and of the 1,013 respondents to the household survey, only 5 residents said they use it most often for their shopping and service needs.

4.94 The study has had the opportunity to look at the current and recently produced Alyth CAP. It is based on extensive community engagement with all members and groups in the local area. It is designed to be a road map to make Alyth a better place to live, work and visit. The CAP identifies many aspects that are strengths and liked about the town, including the appearance, the burn, flowers and planters, the community spirit and excellent surrounding outdoor recreation facilities, to mention but a few. The CAP does identify areas to improve over the coming 5 years, with plenty of detailed actions / recommendations. These include improving the appearance of the centre, addressing roads and parking issues, improving the events activity, improving local economy and tourism appeal, supporting local businesses, and improving access to shops and services. Many of the points concur with or add to the findings of the healthcheck.

Accessibility and Environment

4.95 The town centre is relatively drawn out for such a small offer, spanning Commercial Street, Market Square and Airlie Street. The number of non-active and residential units scattered throughout the town centre reinforces this and in parts reduces the impact of the offer.

4.96 The town centre provides a very pleasant open town scape, with attractive vistas and good sightlines of the available offer. The area around Market Square is attractive, including the Alyth Burn which traverses the heart of the town centre. Commercial Street, adjacent to the Burn is especially attractive and well kept.

4.97 It's easy to park in the centre, and there are buses connecting Alyth to Dundee. The nearest rain station is however 30 mins drive away in Invergowrie.

Diversity of Uses and Retailer Representation

4.98 There were 38 retail / commercial units counted at the time of the review, of which 33 were active and 5 vacant / non-active, producing a vacancy rate of 13%. Vacant units are along the periphery. All bar one of the active businesses are independents, with Co-op being the only multiple operator present.

4.99 The service offer in Alyth is relatively good, with 4 hairdressers and 1 barber shop. Adding in the dentist on Commercial Street, plus pharmacy and solicitors on Airlie Street, plus cycle shops (sale, hire and repair) ensures that service goods dominate the offer overall.

4.100 The rest of the offer contains a small selection of convenience food (Co-op, 2 convenience stores, newsagent and a butcher) along with some specialist comparison goods (gallery, gift shop, hardware store) and a little food and beverage (fish & chip shop, hotel and pub).

4.101 Interestingly for a place as small as Alyth, the town offers a museum (currently closed, reopening next year) and a small library.

4.102 Experian Goad do not have floorspace data for Aberfeldy. Based on the observations of the place review and using measurements from ProMap, CPW Planning has estimated the comparison floorspace to be 330 sqm. and the convenience floorspace to be 680 sqm.

Customer Behaviour and Views

4.103 As the number of residents in the household survey that say they use Alyth as their main destination is so low, it is not possible to draw out any statistically significant findings; nor did Alyth form part of the previous study in 2016. Given the low levels of response there are no graphical representations of the findings.

Indicators of Vitality and Viability

4.104 Again, given the low number of businesses that completed surveys, it is not possible to draw out any statistically significant findings.

4.105 What can be inferred however from the place review, is that Alyth seems to be in a good place in regards health and vitality on the whole. The low vacancy rate in the core town centre, coupled with the high level of service businesses and the high levels of motivation shown by many of the businesses, suggest it is trading well.

4.106 There is no readily available footfall information and the household survey did not give any robust information. The business survey achieved a low number of responses and therefore it is not possible to estimate any clear footfall trend.

Identified Issues and Improvements

4.107 The following table provides a SWOT analysis for Alyth Town Centre going forward.

Figure 4.5 – Alyth Town Centre SWOT

Strengths	**Weaknesses**
The environment of the town is attractive and clean	The offer is limited overall, especially the food & beverage
Businesses seem motivated	Several of the vacant units are long term and in the periphery of the centre
Museum and library present in the town	Single sided retail offers away from the square
Good convenience store as an anchor	The better public realm is hidden from arriving customers
Relatively strong service goods offer	Comments in CAP about poor parking practices
Nearby countryside and leisure attractions	
Destination commercial business adjacent to town centre	
Public realm of the core area and beside the burn	
Availability of parking	
Level of interest and support from community in the CAP process	
Opportunities	**Threats**
More celebrations of the place – there's lots to like about Alyth	Businesses close due to cost-of-living crisis
Make more of history	Landlords convert empty units to residential
Better online promotion of the town and individual businesses	Reduction in offer
Engage with the owners of the empty premises to facilitate and encourage more meanwhile uses	Overlooked by visitors
Curate more visiting markets	Lack of overt welcome to visitors
Reopen the Museum	
Improve the sense of arrival	
Extend better quality public realm	
Make more use of the Burn and adjoining quality environment	
Improve connectivity to surrounding countryside, promote activities	
Improve the visitor economy	
Action recommendations of the CAP	
Support existing local businesses	

Healthcheck Summary

4.108 Overall, it would appear from the findings of the place review that Alyth is in a good state of health and vitality, and that it has the support of the local community. Although the vacancy rate sounds high, these are mostly on the periphery of the offer. The core reasons to use the town centre (service offer, Co-op, fish & chip shop, specialist comparison goods stores) are generally strong independents and seem to be trading well. Residents look to Blairgowrie as the higher order centre, but Alyth can provide the daily essentials.

4.109 Alyth can further adapt its offer to reflect national consumer and place trends, with more services and convenience for the local community. It has the core of a good sense of place and public realm, and this needs to be extended so as to improve the welcome to visitors. An improved or restarted local events programme will attract both local residents and visitors.

4.110 There are no obvious large development sites that need delivering or bringing forward in the town centre.

Auchterarder Town Centre

Overview

4.111 The small town of Auchterarder (often known as the 'lang toon') is located mid-way between Perth and Dunblane, approximately 14 miles / 25 minutes to the south west of Perth.

4.112 The town has a rich history originating with the creation of a hunting lodge for King Malcolm Ceannmor in the 11th Century, although the castle built there no longer stands. Since then, the town has catered for many needs, ranging from a well-respected centre for weaving in the 19th century, to serving the needs of golfers at the very close Gleneagles Hotel, to serving tourists and visitors at the many nearby leisure attractions. Not least of course the town is home to circa 6,000 residents who look to the town for their daily and weekly shopping needs and services.

4.113 Notwithstanding the understated sense of arrival, the town centre boasts many gems of independent business and there is much to like about it.

4.114 In regards the primary research data captured for Auchterarder, 23 surveys were received from businesses either in or near the town centre (21 via face-to-face survey and a further 2 online) and of the 1,013 respondents to the household survey, only 21 residents said they use it most often for their shopping and service needs.

4.115 The study has also looked at the existing Charrette completed in 2015 and the more recent CAP completed in 2022.

4.116 The aims for the Charrette process are to identify potential physical and placemaking interventions for the town centre (not an overall regeneration strategy). The Charrette is a grounded report and includes engagement with local community and community groups. It identified strengths (likes) as independent shops, countryside connection and active community. The dislikes (weaknesses) include poor parking, poor public realm, limited youth activities, integration of new housing and poor connectivity to the station. It identified a number of physical and public realm improvements across the town centre aimed at improving its role as a retail hub, creating a more attractive town centre, enhanced evening economy and improved car parking.

4.117 The more recent CAP covers the period 2022 to 2027. It had an extensive engagement process with over 750 local community participants and over 40 community groups. The 'likes' included community spirit, environment, outdoor recreation, local shops, location and character. 'Dislikes' were dominated by car parking, traffic, pavements and roads, as well as better community facilities / events. Creating a vibrant town centre is just one of themes to emerge, including shops, bars and eateries, clean safe and welcoming, support and promote local shops, add another supermarket and more NTE activity. Lots of good ideas and recommendations.

Accessibility and Environment

4.118 The town centre is easy to access by car and foot, being basically built on both sides of the A824, which forms the High Street that anchors the town.

4.119 The offer is long, and the drawn-out nature of the High Street is both a strength (it is distinctive and famous) and a weakness (it's a long way to shop the whole offer by foot). Furthermore, there are lots of non-active retail units within the core town centre which weakens the overall critical mass of the town centre.

4.120 There is extensive unlimited free parking available on the High Street, although this seems to be at peak capacity at busy times. There is also a free car park in the heart of the town centre at the Crown Inn Wynd, as well as time limited car parking available adjacent to the Co-op store.

4.121 The pedestrian environment is pleasant, and although there is a busy road throughout the middle of the centre, sightlines and visibility of the traffic is good due to the wide pavements and the relatively free flowing traffic. Whilst it certainly doesn't feel car dominated, there could be more crossing points for foot borne consumers that have limited mobility or are young children. Similarly, it feels rather 'grey' and would benefit from more trees, planting and 'pocket parks'.

4.122 There is no train station in the town, the closest being Gleneagles Station. The Charrette identified connectivity to the train station as being an issue. There are plentiful bus stops in the town centre to take passengers up to Perth and beyond.

Diversity of Uses and Retailer Representation

4.123 Auchterarder Town Centre has 66 commercial units counted at the time of the review with only 2 vacancies or currently non-active (producing a 3% vacancy rate). All bar 2 are independent businesses. The multiples are both food stores, Co-op and Spar, while the regional pharmacy Davidsons is also present.

4.124 The offer contains a very broad and well-balanced mix of all key retail categories.

4.125 The convenience goods offer is anchored by a Co-op foodstore, plus a Spar convenience store. Other convenience goods retailers include 2 butchers, 2 bakers, a deli, health food store and a specialist wine merchant.

4.126 The comparison goods offer is especially strong and a major asset for a town the size of Auchterarder, particularly the ladies' fashion and accessories offer, with seven independent boutique high quality destination stores, and dominated by the impressive R Watson Hogg cashmere and boutique clothing shop.

4.127 This is further enhanced by a good quality childrenswear specialist, footwear specialist, home fashion, gifts and a framing specialist / small gallery.

4.128 The services offer is also extensive and strong and provides another string to Auchterarder's bow, with several retail and financial services available, including several specialist destination health and beauty offers, anchored by the impressive Deja Health & Beauty, containing 5 complementary health & beauty operators.

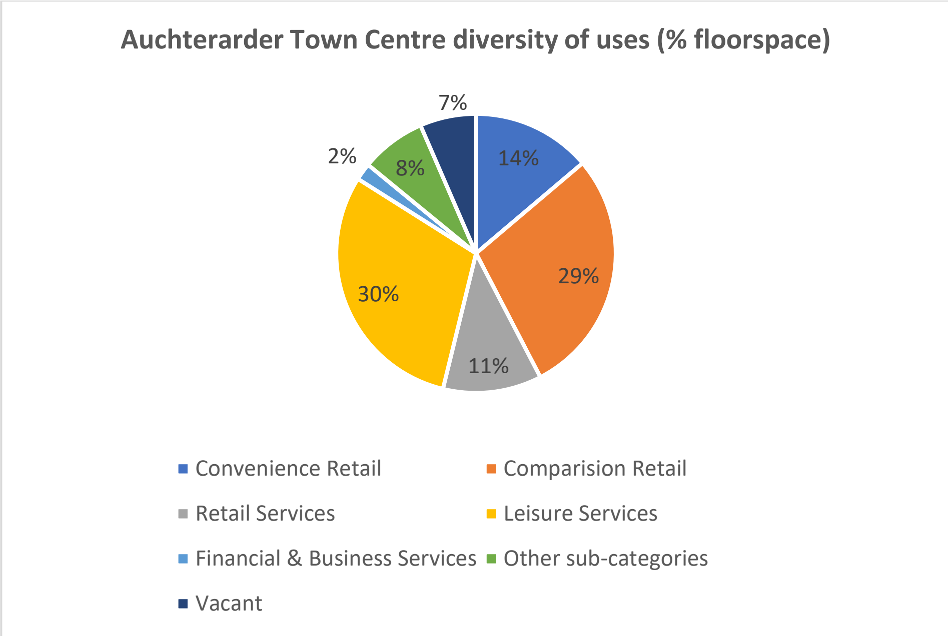
4.129 There are 6 hairdressers / barbers, 2 nail salons, 2 dentists and an optometrist further making up the broad, extensive and appealing offer.

4.130 Finally, there is lots to like about the day time food & beverage offer with several cafes, delis, restaurants and a couple of fish & chip shops.

4.131 The night time offer is also good with 2 good quality independent restaurants / wine bars, 2 Indian restaurants houses (plus an additional takeaway), a Chinese restaurant (plus a further takeaway), 2 pubs and 2 hotels.

4.132 Auchterarder's mix and offer is further enhanced by the Aytoun Hall, an attractive historic building in the heart of the centre available to hire by community groups for events and celebrations.

4.133 In total, Experian Goad estimate that Auchterarder has a total floorspace of 11,706 sqm gross consisting of 3,345 comparison goods and 1,617 sqm of convenience goods. The graph below shows the diversity of retail uses, services, other sub-categories, and vacancies as a percentage of the total amount of floorspace.



Customer Behaviour and Views

4.134 According to the 23 businesses that returned surveys in Auchterarder Town Centre, their customers are mainly local residents (96% of businesses said this), tourists / visitors (87%), people passing through (61%) and local workers (61%).

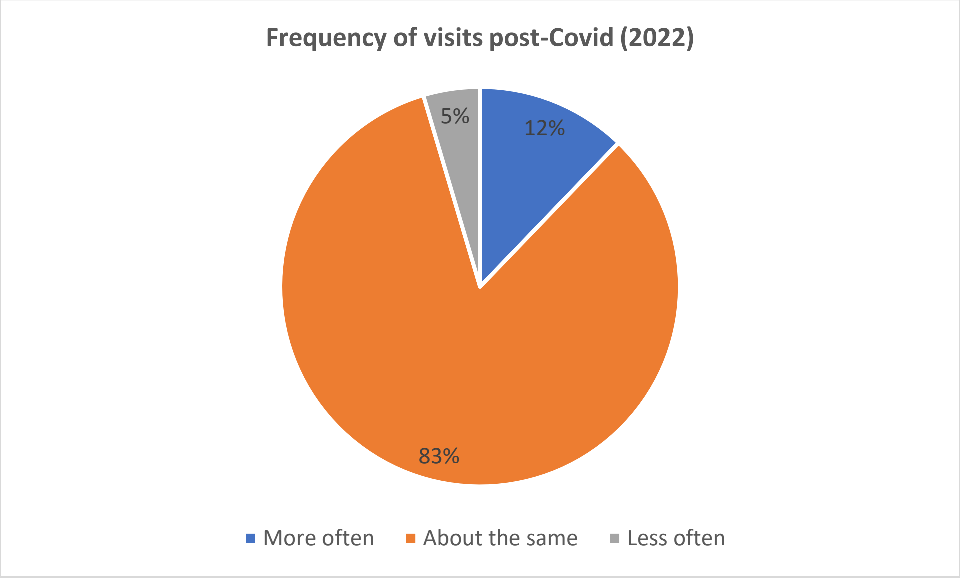
4.135 According to businesses however, most consider tourists / visitors to be the minority of their trade (i.e. typically less than 30%).

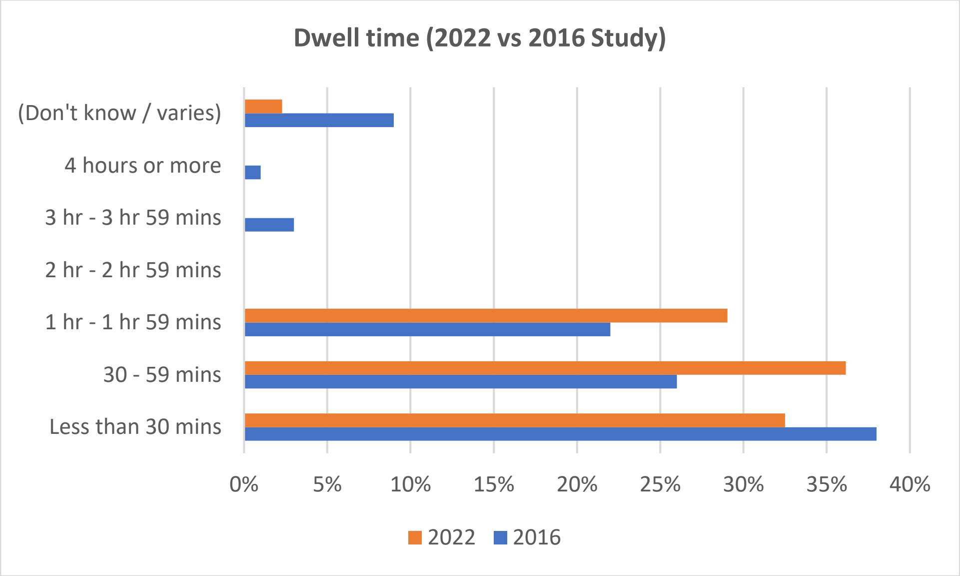
4.136 The customer frequency of visit is infrequent, according to the 21 customers who state they use Auchterarder as their first-choice centre for shop and services, with never (45%) and less often than monthly (16%) being the dominant responses. This suggests that the survey did not pick up the core regular shoppers that visit Auchterarder on a frequent basis. Of those that were included in the survey, travelling by car is the most common mode of travel (49%), although a substantial third (37%) walk in.

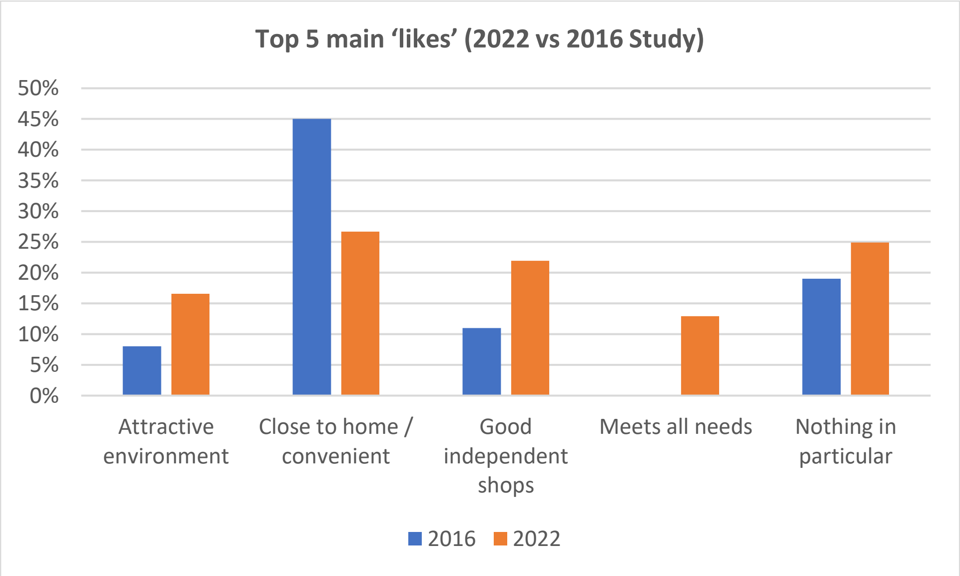
4.137 Most stay for two hours or less (98%), and importantly typically longer than 2016 (86%). Customers are mainly using the food shopping (65%), health services (27%) and cafes / restaurants (20%). Main likes are it is close to home (27%), good independent shops (22%), attractive environment (17%), and 'meets all needs' (13%).

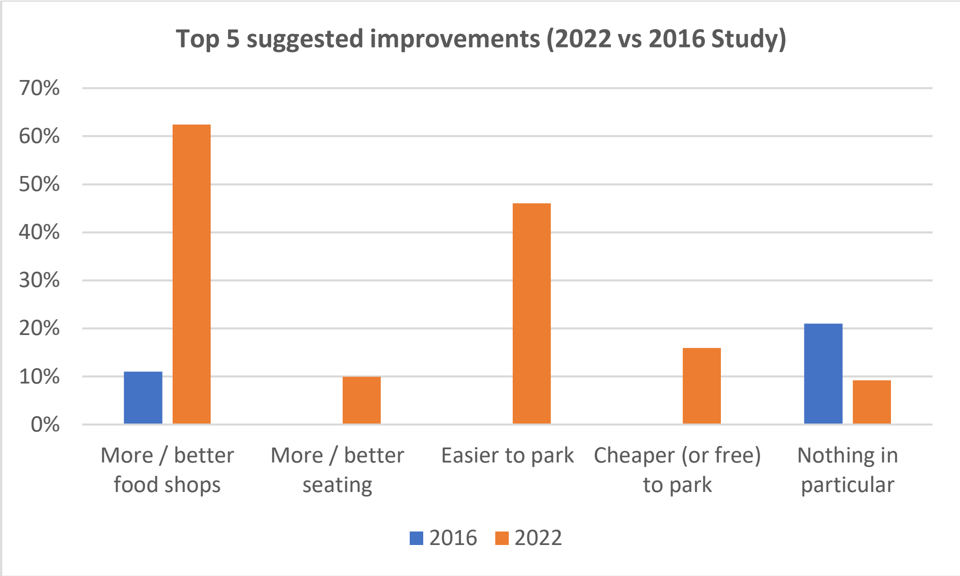
4.138 The evening visits are dominated by cafes / restaurants (51%), pubs / bars (39%) and 'go for a walk' (24%). Consumers in the survey visit Auchterarder Town Centre rarely in the evening (49%); with visit frequency down on 2016 with only 5% currently visiting in weekly, compared to 17% in 2016.

4.139 We have selected some key findings from the household survey research and present these in the graphs below. They are focused on customers' frequency of centre visits post-Covid; average dwell time; the top 5 main 'likes' about the centre; and the top 5 suggested improvements to encourage them to visit the centre more often.

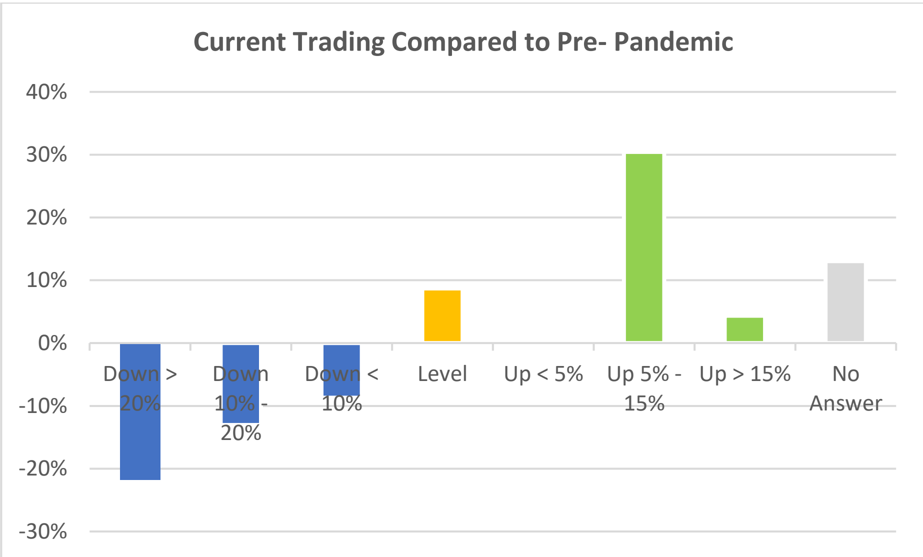

Frequency of visits post-Covid (2022)
5%
12%
83%
More often
About the same
Less often

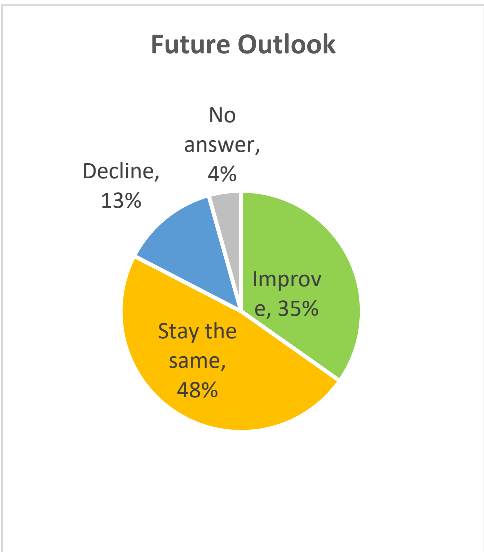

Dwell time (2022 vs 2016 Study)
(Don't know / varies)
4 hours or more
3 hr - 3 hr 59 mins
2 hr - 2 hr 59 mins
1 hr - 1 hr 59 mins
30 - 59 mins
Less than 30 mins
0%
5%
10%
15%
20%
25%
30%
35%
40%
2022
2016

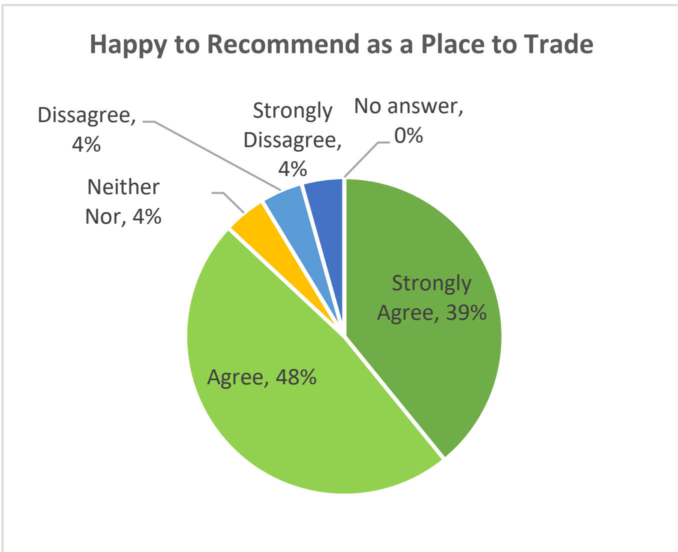

Top 5 main 'likes' (2022 vs 2016 Study)
50%
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
Attractive environment
Close to home / convenient
Good independent shops
Meets all needs
Nothing in particular
2016
2022

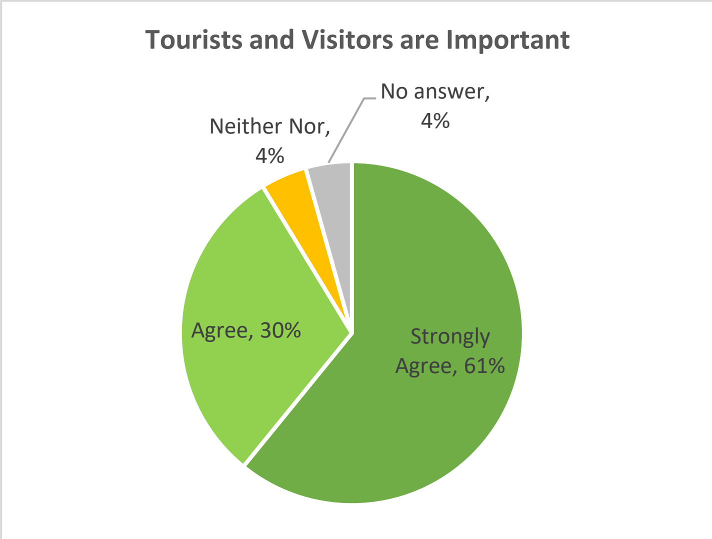


4.140 The graphs below are based on the findings of the business survey. They show the performance of businesses compared to pre-pandemic trading; the business outlook; the degree to which businesses would recommend the location as a place to trade; and the importance of visitors to the centre.









Indicators of Vitality and Viability

4.141 Auchterarder is undoubtedly thriving and in good health, with vacancy levels low at 3%. Many retailers are highly motivated and are delivering great customer service and retail display standards.

4.142 Most customers are visiting at the same frequency as pre Covid (83%) with 12% visiting more frequently and only a few visiting less (5%).

4.143 Footfall information is not readily available for Auchterarder, however both the household and business surveys provide an indication of potential footfall patterns, with the business survey being particularly helpful. The indicators are that footfall is at reasonably healthy levels, improving year on year and possibly more visits since pre covid. The views on parking expressed in the CAP may also be limiting visits and footfall.

4.144 Businesses are well established, with 79% having traded there in excess of 5 years. Most are alas down on trade since before Covid (44%), although encouragingly a third are up (34%). Businesses are typically satisfied with the performance of their business (69%) as well as Auchterarder as a place to trade (69%).

4.145 Most businesses expect trade to stay the same over the next 2 years (48%) or improve (35%). They intend to continue to trade as is in Auchterarder (57%), expand the range of merchandise offered (22%), add more services (22%) or indeed move within the centre (13%).

4.146 Businesses overwhelmingly would recommend Auchterarder as a place to trade (87%) and agree that tourists / visitors are important for the centre (91%), but a significant minority are concerned about the future trading prospects in the centre (51%).

Identified Issues and Improvements

4.147 The following table provides a SWOT analysis for Auchterarder Town Centre going forward.

Figure 4.6 – Auchterarder Town Centre SWOT

Strengths	**Weaknesses**
Distinctive independent led offer	Arrival and directional signage
There are many examples of best-in-class independent businesses in Auchterarder	The place is not being celebrated
Strong day time offer	It's easy to miss some of the very strong businesses
Low vacancy rate	The offer currently feels less than the constituent parts
Businesses are performing well, would strongly recommend the centre as a place to trade	Centre can feel car dominated
Strong and robust mix and offer	The High Road can be difficult to cross at times due to the volume of traffic and lack of crossing points
Aytoun Hall community facility	Some of the private realm is in poor condition in terms of building frontages on the High Street
Local environment and countryside	Seemingly limited visitor activity
Involved community	Pavements (CAP)
Variety of businesses and mix	
Strong day and night catering offer	
Opportunities	**Threats**
Business in the town would benefit from belonging to a new business association, especially one focused on marketing and promoting the offer	Potential decline in performance as more consumers return to shop at the higher order centres
More events and local celebrations	Cost of living crisis encourages more consumers to shop at out-of-town discount food and non-food stores
Consumers want more / better food shops (62%), easier parking facilities (46%), cheaper (or free) parking (10%) and more / better seating (10%) ...	High cost of utility bills for small businesses reduces their ability to trade profitably
Businesses want improved parking facilities (91%), more / better CCTV (43%), more customer toilets (26%), improved signage (22%), better access to shops (22%), better traffic management (22%), improved pavements (17%) and more trees / green space (17%)	Increased traffic through centre of town
Improved sense of arrival – better signage and place branding	Nearby attractions retaining more customers within their estate
Add more crossing points to make it easier for the less able and children to safely cross the road	
Target and attract tourists in the area – make much more noise about town and environs	
Facilitate business of the year awards. Celebrate all that is great about Auchterarder	
Improve the food store provision	
Much better online promotion is needed. Help businesses promote themselves as part of the combined Auchterarder offer	
Curate more events and visiting markets	
More public seating, as well as more tables and chairs outside businesses	
Provide business support to those businesses looking to adapt and improve	
Implement ideas and actions identified in CAP	

Healthcheck Summary

4.148 Auchterarder is undoubtedly in good health. Vacancies are low, many independent retailers (especially the boutique stores) are best in class. Businesses are trading well and are optimistic about the future. For sure there are some minor improvements that could be made to improve the customer experience (more crossing points, better sense of arrival, more seating etc) but fundamentally, the town centre is in sync with its customers and in a good shape as a result. Any support / control provided will need to further strengthen the town centre's appeal and offer.

4.149 There would appear to be 'demand' (not in strict retail capacity terms) from residents and consumers for an additional foodstore in the town. Auchterarder benefits from a diversified offer, including a strong independent clothing offer, and it has an established services and catering offer. In line with place trends it would benefit from increased services, catering and leisure based catering / retail offer. These would also help to increase its appeal to visitors.

4.150 There are ambitions to improve the overall appeal of the town through improved public realm initiatives. These should help to achieve stronger critical mass along with improved access.

4.151 There are no vacant, stalled or priority development sites that need priority attention.

Blairgowrie Town Centre

Overview

4.152 Blairgowrie (and Rattray) are a twin burgh located 16 miles to the north of Perth; a very pleasant 30 minute drive. The latest population estimate (CAP) is circa 9,700. However given the planned growth in housing provision, this is set to increase.

4.153 Blairgowrie has a rich and variety history covering a variety of roles, including a 'staging post', commerce, manufacturing, agriculture and more recently outdoor pursuits, with much of it influenced by its location adjacent to the River Ericht. More recently it has become known as the centre of Scotland's soft fruit industry.

4.154 In regards the primary research data captured for Blairgowrie, 40 surveys were received from businesses either in or near the town centre (38 via face-to-face survey and 2 online) and of the 1,013 respondents to the household survey, 76 residents said they use it most often for their shopping and service's needs.

4.155 The study has also looked at the existing Charrette completed in 2015 and the more recent CAP completed in 2021.

4.156 The aims for the Charrette process seemed to be focussed on developing improvements to streetscape, traffic flows and uses of buildings. Whilst it does contain a number of ideas and recommendations that will improve the customer and visitor experience of Blairgowrie, the more recent CAP has clearer insight and direction for the town.

4.157 The CAP covers the period 2021 to 2026. It had an extensive engagement process with over 400 local community participants and over 30 community groups. The 'likes' included community spirit, surrounding natural environment, local economy and location. 'Dislikes' included the town's appearance and environment, the local economy and the existing roads, traffic and parking. The CAP identifies a number of strategic priorities across several themes, many of which directly impact on the future appeal and attraction of the town centre for the local residents and wider visitors. To name but a small selection; increase town animation, improve shop fronts, increase tourist and visitor numbers, more town promotion, enhance the public realm, more events and support for local businesses.

Accessibility and Environment

4.158 Blairgowrie's town centre is large, and focussed around Perth Street, High St, Allan St and Wellmeadow. Car and pedestrian access is relatively easy, with the town being accessed by the A93. Indeed the recent CAP process identified roads and traffic as issues to address. There are several bus routes passing through the town centre, and bus stops at Wellmeadow provide easy access to the core town centre offer. There is not a train station in Blairgowrie.

4.159 The pedestrian environment throughout the town centre is reasonably good, well maintained and clean. However, pavements can be narrow in places and blocked by parked cars. On many levels the public realm and town centre appearance could be improved to lift the town centre, as identified through the recent CAP process.

The area around Wellmeadow and the bridge over the River Ericht is especially pleasant, as is the small public square at the junction of High Street and Allan Street which contains very attractive planters and seating. There are however several examples of graffiti around the town centre, and much of the street furniture could do with updating, especially the bins.

Diversity of Uses and Retailer Representation

4.160 Blairgowrie's town centre offer consists of 110 retail / commercial units in total, of which 13 are currently vacant or seemingly non-active (a vacancy rate of 12%). All bar 9 of the occupied businesses appear to be independent businesses. The national multiple offerings are from Tesco, Sainsbury's Local, Boots, M&Co, Subway, Original Factory Shop, Hallmark Cards, Halfords and Wetherspoons.

4.161 The convenience food offer is good, with representations from Tesco, Sainsbury Local, 2 butchers, 2 bakers / cake shops, 2 florist and a deli.

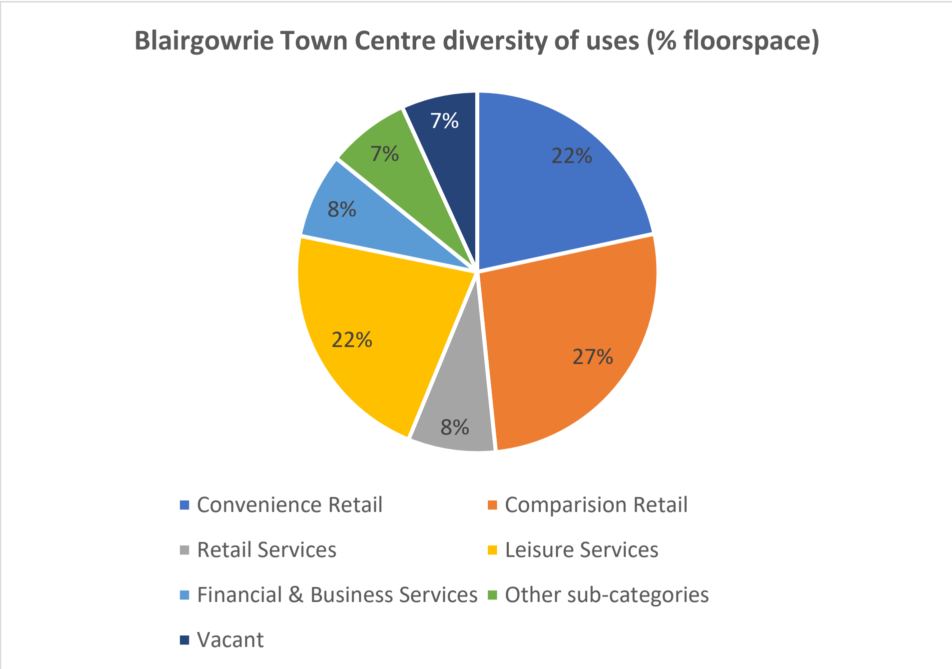
4.162 The comparison goods offer is strong, extensive and a real asset for the town, and includes a M&Co clothing shop, supported by 3 clothing boutiques, 2 fishing / hunting specialists, outdoor clothing, a cookware shop, card shop, pet supplies, highland dress / kilt sale and hire shop, silversmith and a book shop.

4.163 The service offer is reasonable with several estate agents, 3 barbers and 2 hairdressers.

4.164 The food & beverage offer is also reasonable, more so the day time offer than the night time offer which is mainly pub and hot food takeaway dominated. The day time offer contains a range (7) of café and sandwich shops as well as the Wetherspoons pub which also sells hot food snacks and meals during the day.

4.165 One of the issues for the town is that much of its offer on High Street, Perth Street, Allan Street and even Leslie Street is hidden from passing traffic and many customers.

4.166 According to the latest Experian Goad Survey, the town centre offers 31,541 sqm gross floorspace in total with 8,436 sqm gross dedicated to the sale of comparison goods and 6,819 sqm gross of convenience goods. The graph below shows the diversity of retail uses, services, other sub-categories, and vacancies as a percentage of the total amount of floorspace.



4.167 In addition to the permanent offer, the CAP identifies a long list of regular festivals and events that occur in the town, although there is an aspiration to increase the number of such events.

Customer Behaviour and Views

4.168 According to the businesses that returned surveys in Blairgowrie Town Centre, their customers are mainly local residents (95% of businesses said this), tourists / visitors (75%), people passing through (65%), local workers (40%) and students (25%).

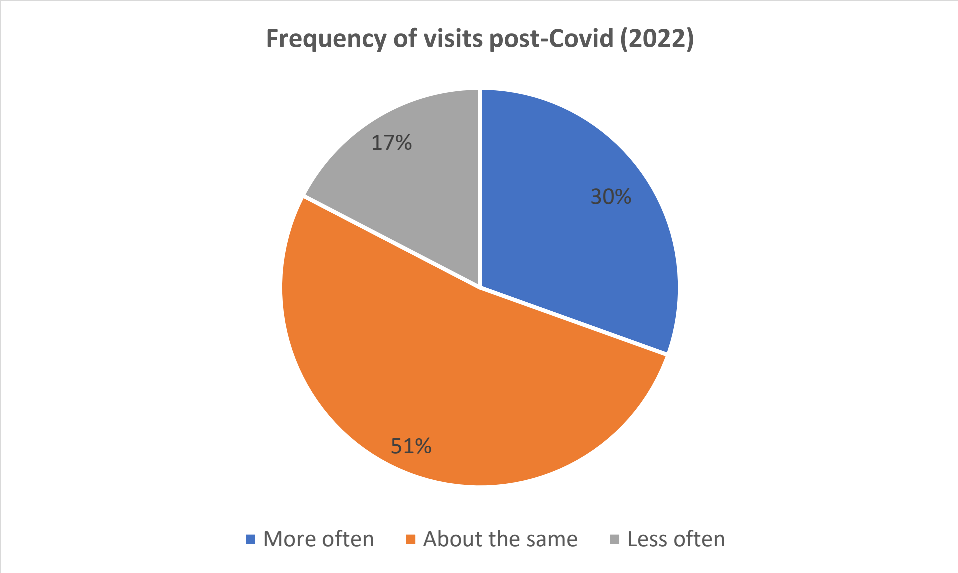
4.169 81% of consumers surveyed in the Blairgowrie research zone say they visit the town centre at least occasionally. Of those that say they use Blairgowrie as their first-choice centre for shop and services, three quarters travel by car (71%) and 16% walk there. Most stay for stay for less than 2 hours (76%)

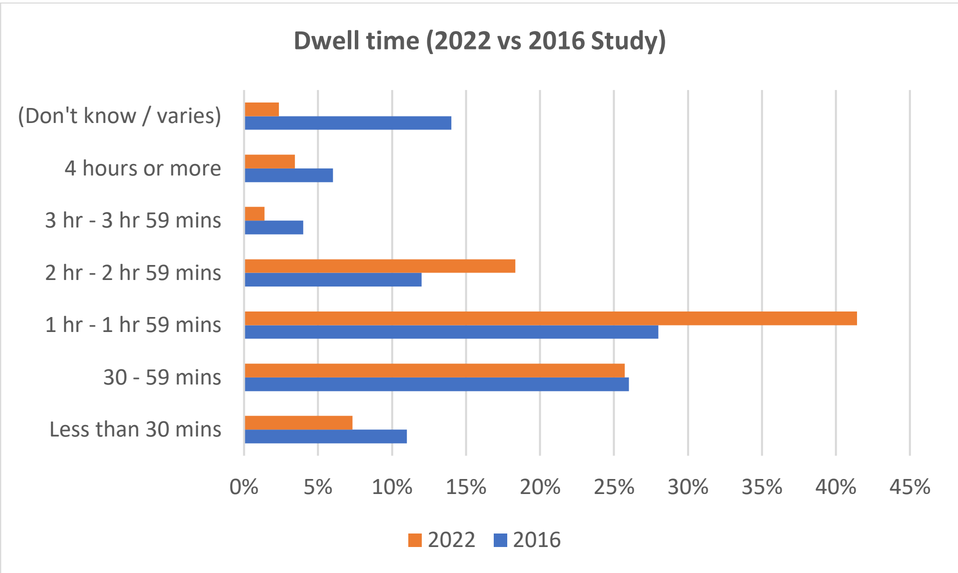
which is up on 2016 results (65%). Customers are mainly food shopping (83%), non-food shopping (74%), visiting the cafes / restaurants (25%) or using the financial services (11%).

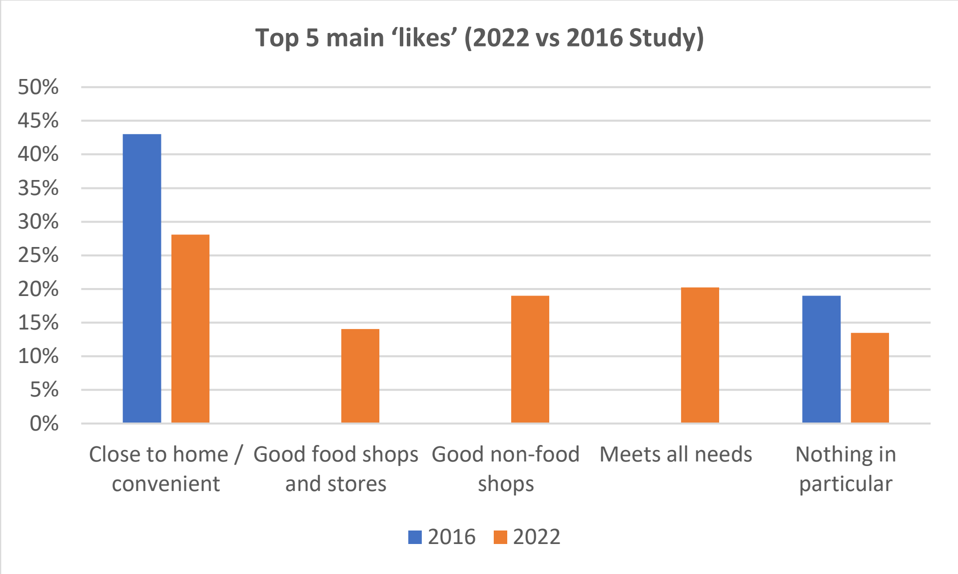
4.170 Customers like the range and choice of shops (43% good / 43% average), the quality of shops (62% good), the town centre environment (67% good) and the availability of parking (39% good). Customers are visiting because it's close to home / convenient (73%) or because of the good range of food and shops (12%). There were no standout specific improvements wanted.

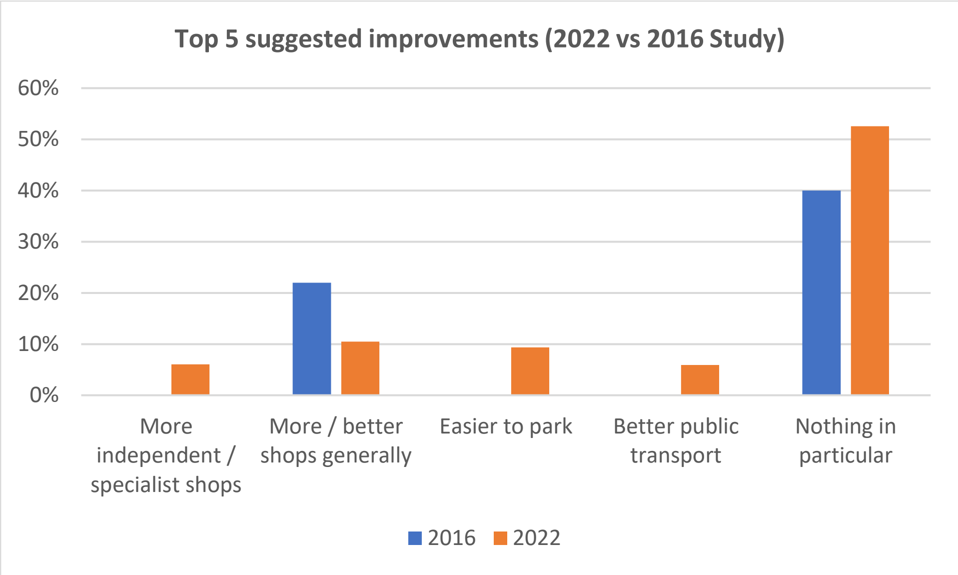
4.171 Most consumers don't visit Blairgowrie in the evenings (70%). Of those that do, they do so because of cafes / restaurants (53%), the gym / swimming / ice sports (24%) or the pubs / bars (21%). There were no standout suggested improvements to the evening offer.

4.172 We have selected some key findings from the household survey research and present these in the graphs below. They are focused on customers' frequency of centre visits post-Covid; average dwell time; the top 5 main 'likes' about the centre; and the top 5 suggested improvements to encourage them to visit the centre more often.

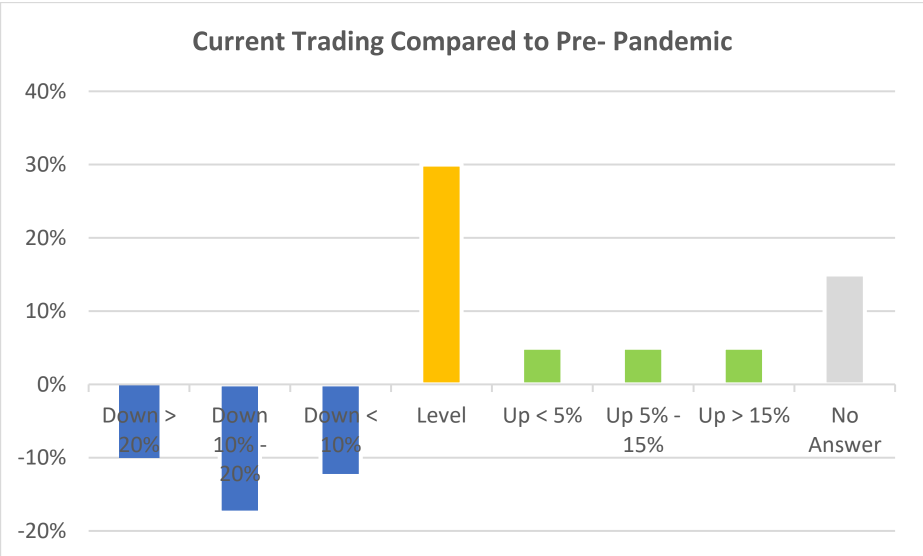


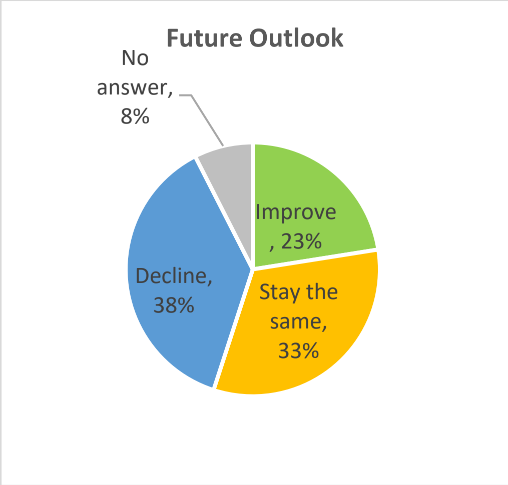


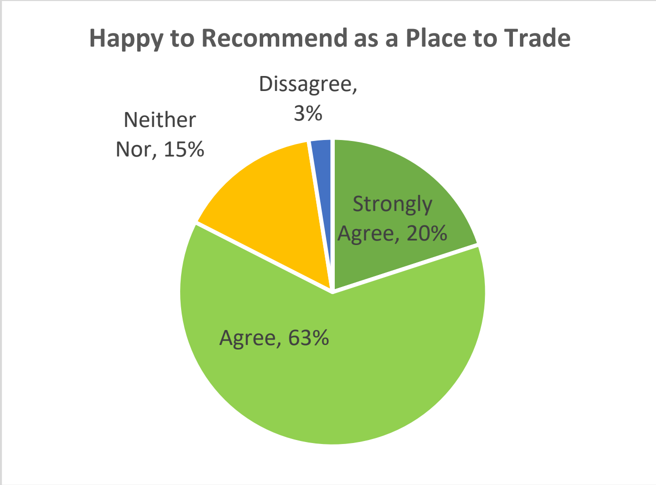


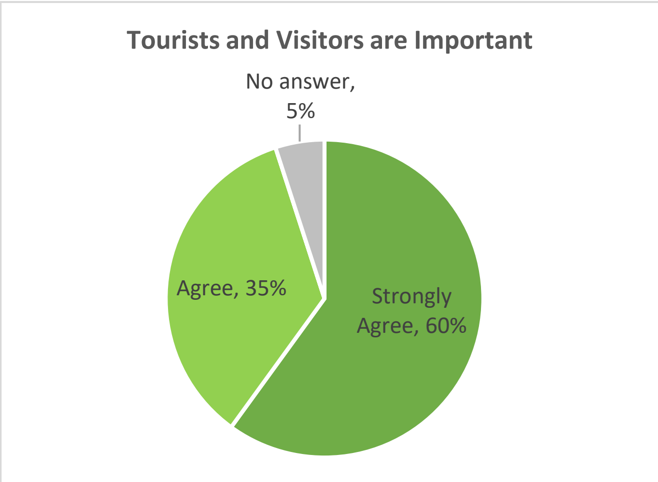


4.173 The graphs below are based on the findings of the business survey. They show the performance of businesses compared to pre-pandemic trading; the business outlook; the degree to which businesses would recommend the location as a place to trade; and the importance of visitors to the centre.









4.174 Blairgowrie appears to be struggling in some respects. Vacancies are on the high side at 12%. Whilst there are a few retailers that appear highly motivated, many don't. There are lots of charity shops or shops that appear to be meanwhile or temporary tenants. Many frontages and shop fronts are in need of investment and upgrading by their landlords and / or their tenants.

4.175 The good news however is that not only are most customers visiting at the same frequency as pre Covid (51%), a significant 30% are visiting more often. The majority of businesses (71%) are well established and have traded in Blairgowrie for at least 5 if not 10 years. Most operators (71%) are happy with the current performance of their business, and a similar amount (68%) are happy with the performance of Blairgowrie as a place to trade.

4.176 In regard to footfall data, there is no readily available data for Blairgowrie. However, the findings of the household and business surveys would indicate that footfall levels are healthy, with most residents visiting at similar or increased frequency than pre covid.

4.177 In regards current versus pre Covid trading, 41% are down, 30% are level and 15% are up. In regards future prognosis, 23% believe performance will improve, 33% expect it will stay the same and 38% expect it will decline. 73% expect to remain in their current premises. Three businesses said they expect to close.

4.178 Having said that and encouragingly, 83% of businesses would recommend Blairgowrie as a place to trade, and nearly all suggested that tourists & visitors are important for the town (95%). 55% of businesses are concerned about the future of trading in the centre, with 30% unsure.

Identified Issues and Improvements

4.179 The following table provides a SWOT analysis for Blairgowrie Town Centre going forward.

Figure 4.7 – Blairgowrie Town Centre SWOT

Strengths	**Weaknesses**
History & heritage	High vacancy rates
Location	Businesses are worried about the future
Environment / square / Wellmeadow	Lots of charity shops
Businesses are positive about their trading experience	Many shops feel as if they are temporary tenants
Customers are responding positively post Covid	Nighttime F&B offer is weak, especially good quality dining
The lamppost banners promoting local events and activities work well	There are several examples of poorly maintained shop & building fronts
Day time F&B offer is good	Traders not optimising performance
Diversity of offer in the town centre	Focus on retail activity
Strong independent sector	Hidden aspect of much of the offer
Existing programme of events	Limited connectivity to natural assets
Surrounding natural assets and cultural assets	Lack of impact for heritage or cultural assets
Strong food anchor	Limited connectivity to river
Opportunities	**Threats**
Customers would like to see more / better shops generally (10%)	Landlords decide to convert retail to residential
In regards the mix and offer of Blairgowrie, operators want more shops overall (53%), independent shops (48%), better leisure facilities (45%), cultural attractions (43%), more / better events (38%), more visitor accommodation (38%), more / better markets (28%), more cafes and restaurants (18%)	Cost of living crisis forces marginal businesses to close
And in regards the customer experience, operators want improved parking facilities (75%), more / better CCTV (50%), better traffic management (43%), more customer toilets (40%), cleaner / tidier (30%), improved signage (25%), improved facilities for cyclists (23%), better access to shops (20%), better sense of arrival (20%), improved safety and security (20%), more focus on heritage (20%)	Customers choose to visit somewhere else more attractive and welcoming
Create new retail association to promote the offer	Downturn in business and limited ability to pro-actively change
Create prospectus to target new investors and operators for the vacant units	Limited wider reasons to visit and use town centre
Encourage more visiting markets & events	Spiral into a poorly maintained town centre with ASB issues
Curate and facilitate more local celebrations	Lack of ownership of improvement actions
Encourage more public seating as well as outside shops and cafes	
Improve evening usage of the centre	
Improve cleaning and graffiti removal	
Improve appeal to visitor economy	

Healthcheck Summary

4.180 Overall, it would appear from the findings of the place review, business survey and household survey that Blairgowrie is in a reasonable state of health (it is not in poor health, but it could be stronger). Although the offer looks weak in parts because of the number of vacant units, charity shops, temporary tenants and limited visibility, fundamentally it remains a strong offer because of the strong convenience offer, wide choice of comparison goods specialists and the positive customer visit pattern.

4.181 The town is well placed to adapt its offer in line with emerging consumer and place trends. There are opportunities for a stronger service offer, an improved night-time catering offer and more leisure / service / catering providers. There are empty units that can be occupied by additional offers. There are also opportunities to better promote the existing offer (as identified through the recent CAP process). This can range from social media activity to physical signage promoting the existing offer. In addition to improved promotion, the town would benefit from improvements to the physical experience. The improved use of existing spaces, and promotion of the current offer, is required.

4.182 There are no large development sites that need bringing forward in the town centre, although several smaller units need investment and upgrading.

Coupar Angus Town Centre

Overview

4.183 Coupar Angus is a small town on the borders of Perthshire and Angus, circa 13 mile (30 mins drive) from Perth and also circa 14 mile (27 mins drive) from Dundee. It has a current estimated population of circa 2,200 sourced from its current draft CAP.

4.184 As a result of its location in the heart of Strathmore, historic roles have included a 'staging post', centre of commerce, markets & cattle fairs, religion, agricultural (soft fruits) and linen manufacturing. The major employer today is the 2 Sisters chicken processing plant to the south west of the town centre.

4.185 In regards the primary research data captured for Coupar Angus, only 3 surveys were received from businesses either in or near the town centre (2 via face-to-face survey and 1 online) and of the 1,013 respondents to the household survey, just 7 residents said they use it most often for their shopping and service needs. A very low figure for statistical analysis and Coupar Angus did not form part of the previous study in 2016.

4.186 At the time of the study, Coupar Angus was the focus of a CAP based on extensive engagement with local community groups and residents. The aim is to understand the local issues and concerns and to identify preferred priority actions to enhance Coupar Angus over the next 5 years. The draft CAP identifies 4 key themes: a united community; tackling disadvantage; improving the environment; and improving the appeal of Coupar Angus as a place to live, work, and visit. The identified actions will go a long way to helping to improve the vitality of the town and its appeal to local residents and passers-by / visitors. Particularly the community events, housing developments, improved tourism initiatives and wider environmental actions.

Accessibility and Environment

4.187 Coupar Angus has a small and compact town centre that is easy to find, access and use. The offer is concentrated on High Street with its junctions of Union Street as well as Athole Street.

4.188 The town centre environment is relatively pleasant, and has clearly benefitted from townscape improvements in recent years, as well as the upgrade of dilapidated buildings including the old Royal Hotel, now converted into flats. The core pedestrianised High Street area is especially appealing. However the High Street is bisected by the A94 and former shop / hospitality units on the southern / far side of the A94 are clearly long-term vacant units in need of repurposing.

4.189 The town centre has also benefitted from the creation of the Strathmore Community Hub located adjacent to the town centre which provides a touch point for community engagement, services, activities and events.

4.190 Having said that, there are still several buildings and especially the ground floor retail and commercial units that are empty and or in poor state of repair. These provide a very poor visual impression.

4.191 It is easy to park in Coupar Angus, with lots of on street free car parking available. Whilst the train station closed a long time ago, there are plentiful and regular (hourly) bus trips that link the town with both Perth and Dundee.

Diversity of Uses and Retailer Representation

4.192 There were 30 retail / commercial units counted at the time of the review, of which 20 were active and 10 vacant / non-active (vacancy rate of 33%). All bar one of the active businesses are independents with Scot Mid Co-op and Premier convenience store being the only multiple operators present.

4.193 It has to be highlighted however that several of the active units appear to be just about 'hanging on' to a commercial life, containing temporary / part time amateur retail occupants selling tatty household goods & bric-a-brac.

4.194 The convenience goods offer is reasonable, with a small Scot Mid Co-op in the heart of the town centre as well as a small Premier convenience store and a baker. There is also an additional Scot Mid Co-op just outside but close to the town centre adjacent to the 2 Sisters Plant.

4.195 The services offer is limited, with 2 hairdressers, a pharmacy and a dentist. There is no comparison goods offer as such other than second hand items in a couple of the shops.

4.196 The food & beverage offer is also limited, with a pub (plus one that appears to have very recently closed), an Indian restaurant and a fish and chip shop.

Customer Behaviour and Views

4.197 As the number of residents in the household survey that say they use Coupar Angus as their main destination is so low, it is not possible to draw out any statistically significant findings.

Indicators of Vitality and Viability

4.198 Given the low number of businesses that completed survey, it is not possible to draw out any statistically significant findings. There is therefore no graphical representation of the business survey findings for Coupar Angus.

4.199 The visual assessment would identify Coupar Angus as being in poor health. The offer is very limited, with few reasons to choose to use the town centre. The service provision and convenience offer is not sufficient to generate significant footfall. The new community facility will hopefully act as a catalyst for the town.

Identified Issues and Improvements

4.200 The following table provides a SWOT analysis for Coupar Angus Town Centre going forward.

Figure 4.8 – Coupar Angus Town Centre SWOT

Strengths	**Weaknesses**
Town centre environment is positive in places, due to the recent townscape improvements	Many buildings & shop fronts are in poor condition
Town centre is easy to access	High vacancy rates
Plentiful free car parking	Many active retailers don't look professional
Strathmore Community Hub	Signage from the A94 is underwhelming
Good bus services between Coupar Angus to Perth and Dundee	Comparison goods offer is nonexistent
Visible convenience and service goods offer	Sight lines from access routes are not positive
Opportunities and initiatives set out in the CAP	No reason to stop off when using the A94
Engagement completed for the CAP	High profile and long term vacant unit dominates sight line to passing traffic
Opportunities	**Threats**
Encourage more visiting markets / pop up / visiting / mobile businesses	Businesses close due to cost-of-living crisis
Encourage landlords to invest in their building fronts	Landlords convert empty units to residential
Help and support existing businesses improve their retail display standards	Lack of investment by new businesses to enter the town
Promote offer to local residents	Continued closure of poor-quality businesses
Encourage more residents to start businesses	Lack of leadership and growth plan
Increase convenience, catering and service offer	Continued closure of businesses
Use new community hub as a catalyst for the town	Improvements to other centres further reduce visits
Create events for the town centre to drive footfall / visits	
Attract local and nearby residents into the town	
Develop a growth plan / template action initiative	
More community activity and events in the town	

Healthcheck Summary

4.201 It would appear that Coupar Angus Town Centre is struggling at the moment and in decline, not helped by the pandemic and the current economic climate. Although the study has not captured robust empirical data in the two surveys, it is clear from the high vacancy rate, poor retail experience and levels of existing motivation that businesses in the town centre are finding times tough. Coupar Angus is currently easy to bypass, literally and virtually. Existing residents can easily access improved and better facilities in nearby and major centres. Without the implementation of the CAP recommendations, along with a clear plan for improvement, the town will continue to struggle. Further enhancement to its public realm, creating spaces for community activities, visiting operators, markets, events (in the middle of the centre) will be part of the solution. Pro-active promotion to residents and businesses is another, in addition to the need for improved signage and visibility. Pro-active interventions are needed to change the direction of decline for this centre. It is not in a position to organically adapt to the emerging trends for consumers and places.

4.202 There are no key development sites in the town centre that need bringing forward, as the two key ones (former Royal Hotel, Town Hall and site opposite on George Street) have recently been improved. There is however the old Strathmore Hotel adjacent to the town centre on the southern side of the A94 which seems to be in quite a perilous and poor-quality condition.

Crieff Town Centre

Overview

4.203 The historic market town of Crieff occupies a strategically important location linking the Highlands and the Lowlands of Scotland, as well as the North of England. It has been the centre of commerce and cattle markets for several centuries.

4.204 More recently in the 19th century it was a fashionable destination for tourists and visitors from Glasgow, Edinburgh and further afield, keen to enjoy the hydrotherapy facilities of what is now the Crieff Hydro Hotel. Although much of the original townscape was ransacked and destroyed in the early 18th century, many of the rebuilt buildings stand proudly today, providing a rich, varied and beautiful townscape for its circa 7,500 residents.

4.205 There is lots to like about Crieff, from its built environment, history and heritage, friendly people, independent businesses and location near to many leisure and tourist destinations as well as some of the country's finest countryside.

4.206 In regards the primary research data captured for Crieff, 48 surveys were received from businesses either in or near the town centre (44 face to face surveys and a further 4 online) and of the 1,013 respondents to the household survey, 44 residents said they use it most often for their shopping and service needs.

4.207 The study has also looked at the existing Charrette completed in 2015 and the more recent CAP completed in 2021.

4.208 The aims for the Charrette process are stated as developing a 20-year vision for Crieff. It starts by pointing out (in 2015) that the town recently benefitted from new schools, leisure, health and library facilities. Whilst the vibrant town centre independent shops, galleries and cafes were a key strength, the number of vacant shops was too high. The 'likes' identified included vibrant town centre independents, community, connections to countryside, local attractions and heritage. Dislikes included parking, traffic dominated town centre, empty shops and scruffy public realm. Key initiatives included improvements to the high street offer and experience, improve connectivity to surrounding countryside and attractions, and improve parking.

4.209 The more recent CAP covers the period 2021 to 2026 and had an extensive engagement process with lots of resident and community group participants. The 'likes' included people and community spirit, surrounding natural environment and open spaces, local economy and amenities. 'Dislikes' included the town appearance and environment, the local economy and amenities, roads, traffic and parking. The CAP identifies seven priority themes and lots of detailed actions. These include improvements to the town centre's offer, appearance, experience and physical environment. Other areas included support for local businesses and improved traffic management and parking.

Accessibility and Environment

4.210 The core town centre offer is located on High Street, along with its East and West extensions, with its heart being James Square / Murray Fountain and provides a very pleasant environment indeed. The streetscape is very open, the pavements are wide and there are many established trees along with well-maintained plant beds. There are lots of places for residents and visitors to sit and enjoy the space, which is unfortunately shared with lots of traffic.

4.211 Whilst there are several changes of levels given the sloping nature of the landscape, it's easy for pedestrians to move around the square as well as the town centre as a whole.

4.212 There are several well maintained and free to use car parks around the town centre as well as plentiful on street paid short term car parking.

4.213 Unfortunately, the town's train station was closed following the Beeching Report; however there many easy to access bus stops located throughout the town.

Whilst the environment is very pleasant in the core town centre, it has to be noted that there are several high-profile vacant units scattered across the town centre, with the former Drummond Arms Hotel being especially noticeable as well as East High Street containing a cluster of voids. Unfortunately, these units create a visible impression that Crieff Town Centre is currently in decline. The pedestrian experience can also feel negatively impacted by the high volumes of traffic that pass through the town centre, especially HGV's.

Diversity of Uses and Retailer Representation

4.214 Crieff feels like a big town centre, which is partly down to the high visibility and impact of the offer, multi-floor nature of many of the town's buildings with retail or commercial units on the ground floor, and also the wide diversity and range of independent businesses selling comparison, convenience, service and food & beverage goods. Indeed, there were 111 retail / commercial units counted in the wider town centre, of which 24 were vacant or seemingly non-active at the time of the review (vacancy rate of 22% in unit terms).

4.215 The comparison goods offer has some strong and appealing stores, including Valentines of Crieff, several other clothing boutiques and interestingly a number of artist and handmade galleries.

4.216 The offer is further supplemented by 3 jewellers, 2 gift shops, 2 craft shops, tartan specialists, home fashion shop, a soap specialist, pet shop, toy shop and a hardware shop. The vast majority of business (95%+) are independent operators. Multiple operators include Spar, Subway, Premier convenience store, Co-op, Bargain Buy and B&M (although the latter two are not part of the town centre offer).

4.217 In regards the convenience goods offer, there are no dominant or recognisable food stores in the town centre apart from Crieff Food Co., which is a high-quality independent food store, gift shop and café. Other attractive elements of convenience goods provision include a sweet manufacturer and retailer (Gordon & Durward), chocolate specialist (McNees) and a deli (JL Gill).

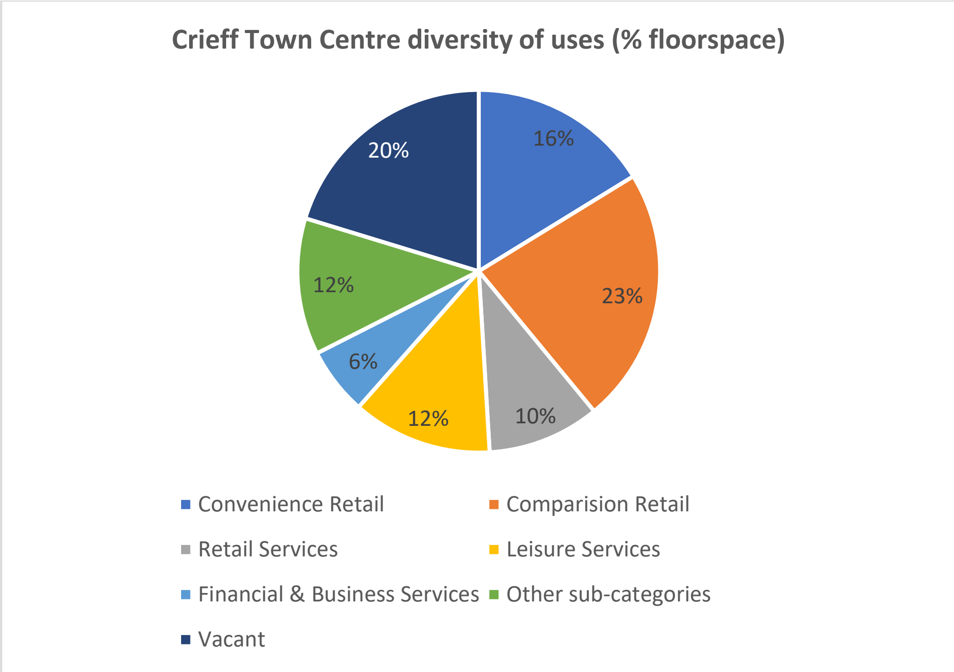
4.218 It is worth noting that there is also a Co-op food store on Union Terrace on the periphery of the town centre boundary, although this seems not to be used as part of the town centre offer, i.e. it appears to be a separate shopping trip.

4.219 The retail services offer in Crieff is good, with several pharmacies, hairdressers and barbers (circa 10), 2 opticians, 2 cosmetic dentists and 2 beauty salons / nail bars. The financial services offer is weak with most of the banks that used to trade in Crieff having closed their premises.

4.220 The daytime food & beverage offer is also reasonable with a reasonably wide variety of food styles available from quality sandwiches and hot food to traditional cafes, destination restaurants and themed specialists (Scottish, chocolate, whisky) and so on. The night-time offer is also reasonable with 8 dine in restaurants open at night counted at the time of the review.

4.221 Although it was not active at the time of this project, we are aware of the popularity of the Crieff Highland Gathering and understand it is a big draw for Crieff and helps to put it 'on the map' and grow its reputation. The Crieff Hydro Hotel is also a major asset for a draw to the town. Having said that, the surrounding assets and visitor attractions are not well signposted within the town centre. Crieff does have an active events programme, which is planned to grow. Crieff also hosts a monthly market during the summer months on James Square.

4.222 According to Experian Goad, Crieff has 21,804 sqm gross of total floorspace, of which 4,970 sqm is comparison goods and 3,540 sqm is convenience goods. The graph below shows the diversity of retail uses, services, other sub-categories, and vacancies as a percentage of the total amount of floorspace.



Customer Behaviour and Views

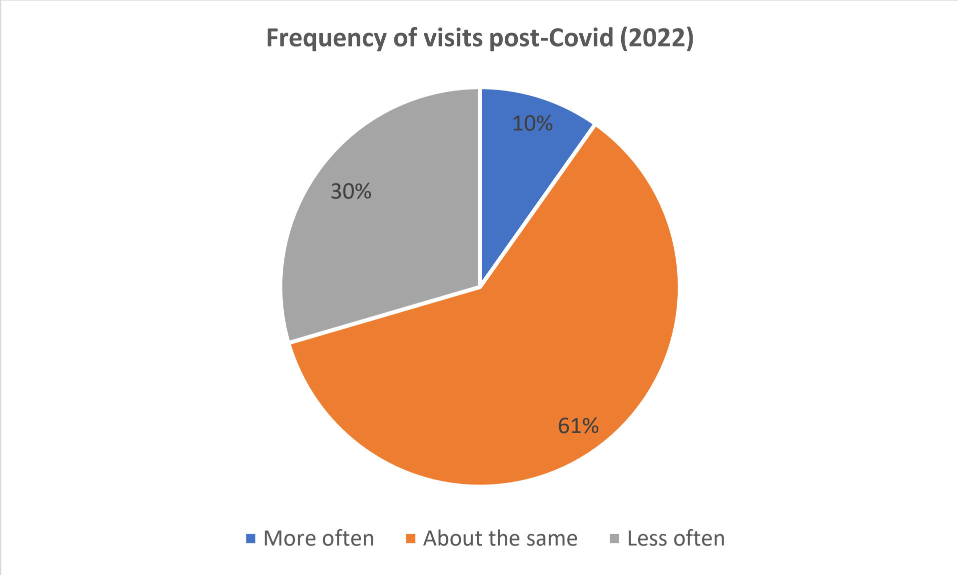
4.223 According to the household survey undertaken for the study, typically residents visit by car (68%) or walk (29%), and two-thirds stay for less than 2 hours (66%).

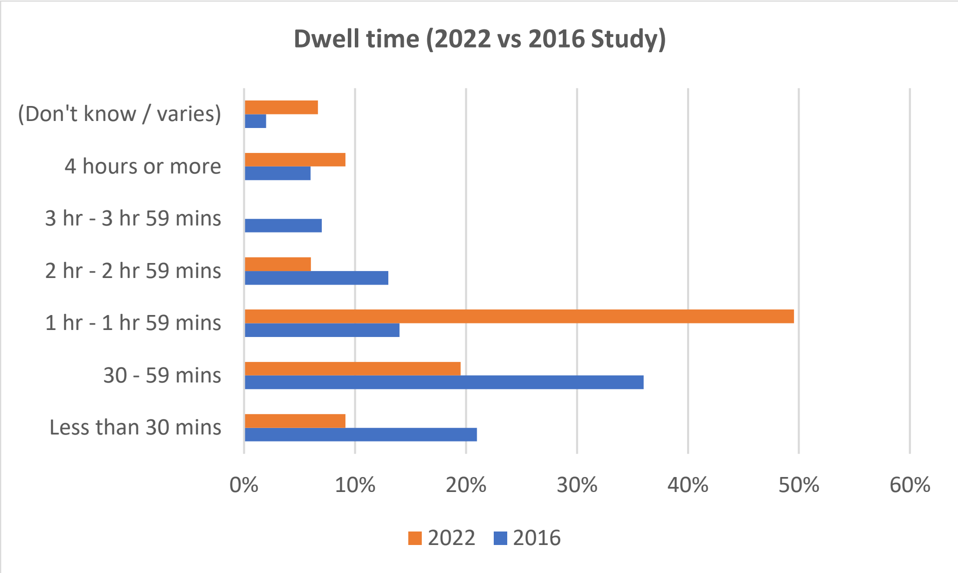
4.224 Customers rate the range and choice of shops as average (52%) or poor (30%), the quality of shops as average (47%) or good (34%), and the town centre environment as average (45%) or poor (32%). The rating for parking is mixed, and it's worth pointing out that most of these ratings are better / more positive than the last survey undertaken in 2016.

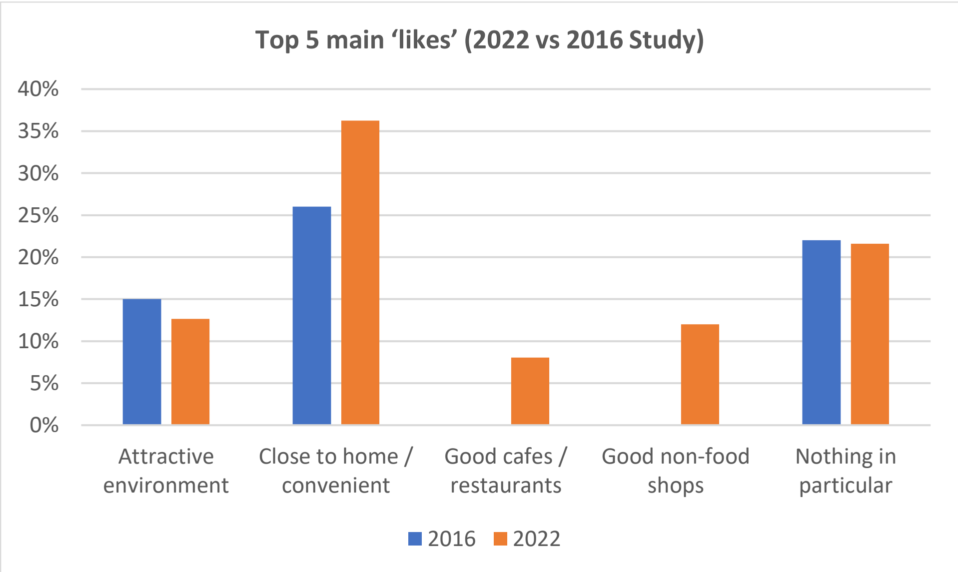
4.225 Customers visit because of the food shopping (46%), non-food shopping (45%), the cafes / restaurants (29%), the financial service (12%) and to work/study (11%). They like the fact that it's close to home / convenient (36%), the attractive environment (13%) and the good non-food shops (12%). Customers would like to have more / better shops generally (24%), see it updated / refurbished (14%), and have easier parking (12%) and less empty shops (11%).

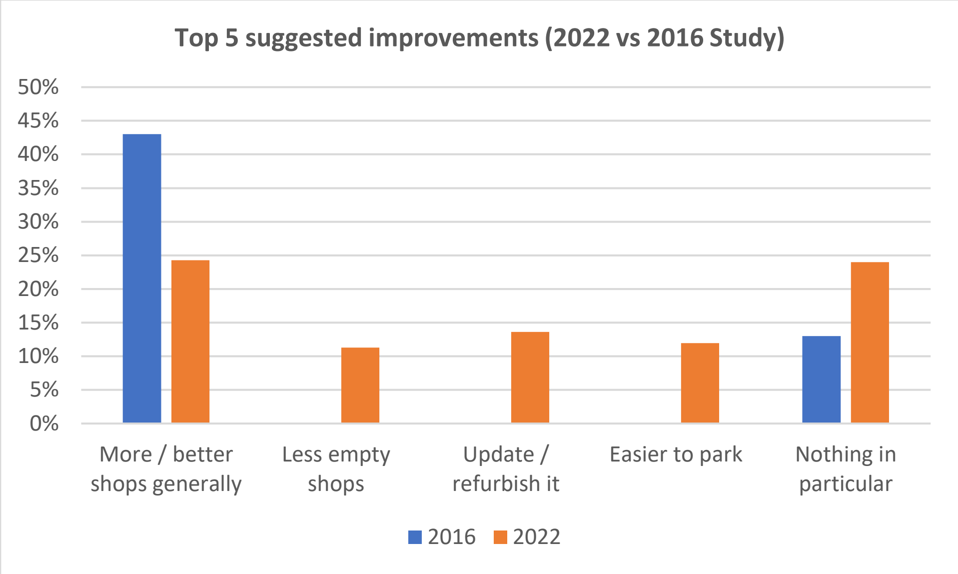
4.226 Customers rarely visit Crieff in the evening (10% visit it monthly, 60% never), but would like to see better cafés / restaurants / pubs (26%), improved security (14%), shops / pubs / venue open later (14%) and a cinema (12%).

4.227 We have selected some key findings from the household survey research and present these in the graphs below. They are focused on customers' frequency of centre visits post-Covid; average dwell time; the top 5 main 'likes' about the centre; and the top 5 suggested improvements to encourage them to visit the centre more often.


Frequency of visits post-Covid (2022)
10%
30%
61%
More often
About the same
Less often

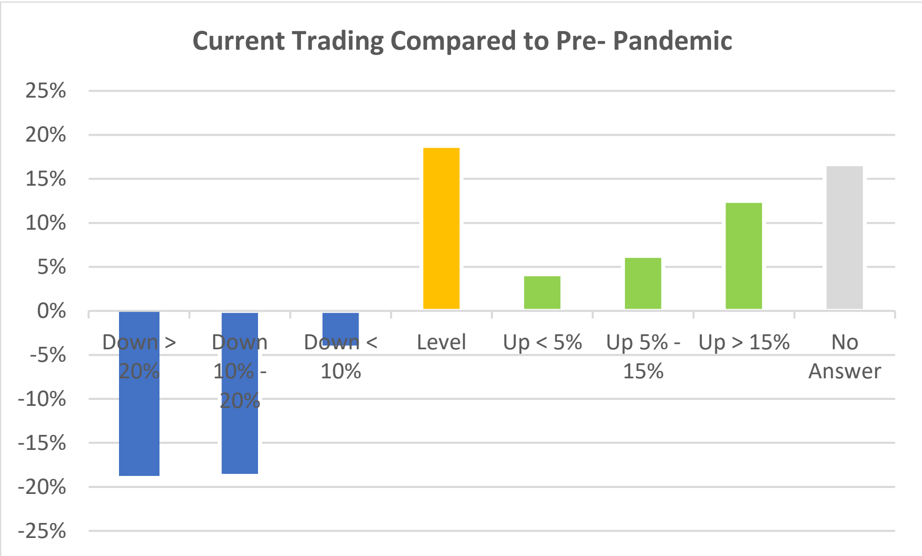

Dwell time (2022 vs 2016 Study)
(Don't know / varies)
4 hours or more
3 hr - 3 hr 59 mins
2 hr - 2 hr 59 mins
1 hr - 1 hr 59 mins
30 - 59 mins
Less than 30 mins
0%
10%
20%
30%
40%
50%
60%
2022
2016

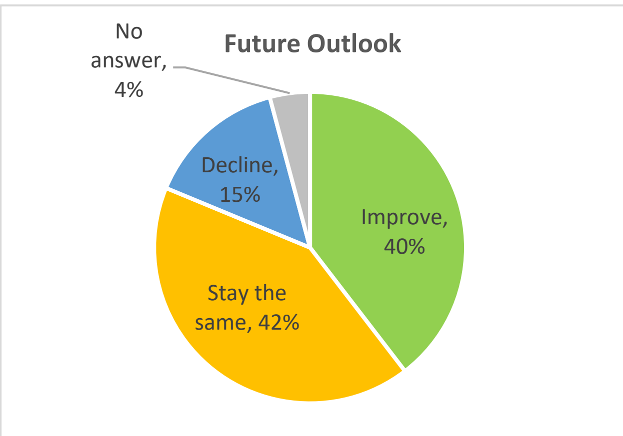

Top 5 main 'likes' (2022 vs 2016 Study)
40%
35%
30%
25%
20%
15%
10%
5%
0%
Attractive environment
Close to home / convenient
Good cafes / restaurants
Good non-food shops
Nothing in particular
2016
2022

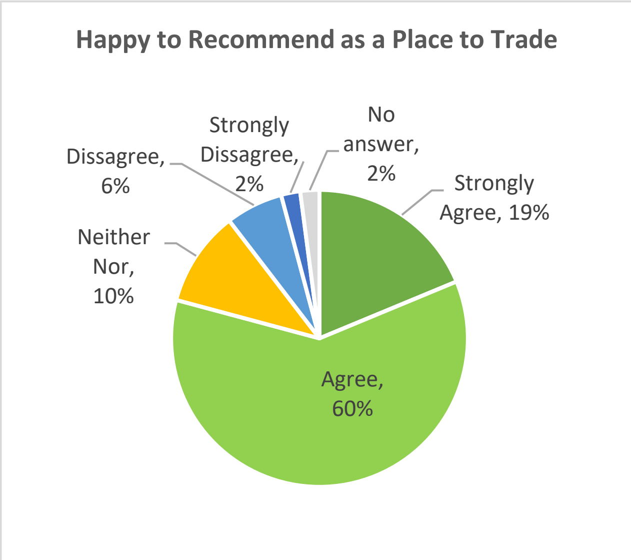


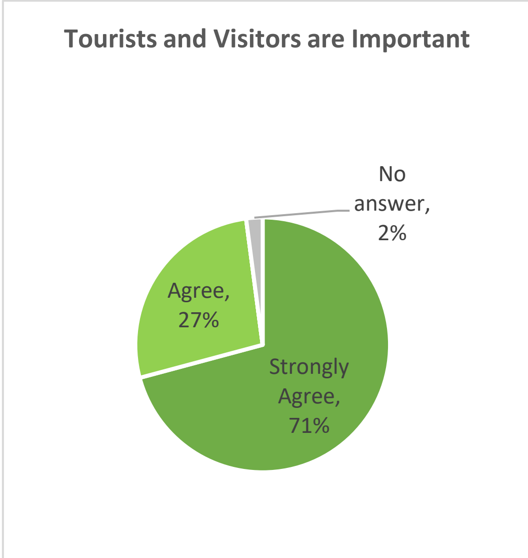
4.228 According to businesses, customers are mainly local residents (100% of businesses said this), tourists / visitors (81%), people passing through (56%), local workers (48%) and students (23%). Businesses are typically well established (71% trading for more than 5 years) but are trading down since before the pandemic (42%).

4.229 The graphs below are based on the findings of the business survey. They show the performance of businesses compared to pre-pandemic trading; the business outlook; the degree to which businesses would recommend the location as a place to trade; and the importance of visitors to the centre.









Indicators of Vitality and Viability

4.230 Crieff is struggling at the moment and with a vacancy rate of 22%, this is the second highest vacancy rates out of all the study locations. Having said that, many of these vacancies are chain failures and / or strategic countrywide decisions (e.g. banks rationalising their networks). That said, the 2015 Charrette also identified high vacancy rates as an issue for the town.

4.231 Undoubtedly the town seems to have been particularly affected by the pandemic. Although most customers that were picked up in the household survey say they are visiting at the same level of frequency than pre-pandemic (60%), 30% say they are visiting less. As a result, more businesses are typically down than level or up in regards their current trading levels (42%).

4.232 Businesses are typically established (71% trading longer than 5 years) and are happy with the current performance of their business (77%) as well as Crieff as a place to trade (73%). Encouragingly, most businesses would recommend Crieff as a place to trade (69%) and overwhelmingly agree that tourists and visitors are important for the centre (98%). They are however concerned about the future of trading in the town centre (57%).

4.233 Footfall data is not available for Crieff town centre, however the results of the household and business surveys do provide an indication of footfall trends. Based on the survey responses it would appear that footfall levels in the town are yet to return to pre covid levels (indeed they may be some way short of them).

Identified Issues and Improvements

4.234 The following table provides a SWOT analysis for Crieff Town Centre going forward.

Figure 4.9 – Crieff Town Centre SWOT

Strengths	Weaknesses
Distinctive independent dominated offer	There are many large and high-profile vacant units throughout the town centre
Variety of uses in the town centre	Town centre can feel dominated by the volume of traffic passing through, as well as the speed of vehicles
Quality of many businesses trading in the town centre	Lack of links to surrounding attractions
Quality of public realm in heart and parts of the centre	The quality of the private realm is poor in many parts of the town centre, both east and west
Established town centre offer appealing to residents and visitors	Food store provision in town centre is weak
Events and visiting activity	No active business association
Rich history & heritage offer	Many of the banks have closed
Many listed buildings in good condition	
Wonderful countryside nearby	
Nearby attractions and natural environment	
Fabulous spa hotel close to town centre	
Visibility of the offer	
Lots of available seating in town centre core	
The ever popular and famous Crieff Highland Gathering	
Opportunities	**Threats**
Consumers want more / better shops generally (24%), update / refurbish it (14%), easier to park (12%) and less empty shops (11%)	Crieff suffers reputational damage as a place to trade within the retail industry due to the current high levels of vacant units
In regards the mix and offer, businesses especially want a variety of improvements, including more independent shops (67%), more / better events (44%), more cultural attractions (38%), more shops overall (35%), more visitor accommodation (33%), more / better leisure facilities (29%) and more cafes & restaurants (17%)	Potential decline in performance as more consumers return to shop at the higher order centres
In regards the customer experience, businesses particularly want improved parking facilities (58%), more customer toilets (56%), cleaner / tidier (54%), Improved pavements (52%), more / better CCTV (50%), better traffic management (42%), more trees / green space (27%), better sense of arrival (25%), improved signage (23%), more public art (23%) and improved facilities for cyclists (21%)	Cost of living crisis encourages more consumers to shop at out-of-town discount food and non-food stores
New broader membership retailer / business association	High cost of utility bills for small businesses reduces their ability to trade profitably
Create prospectus to target new operators and investors for the vacant units	
Facilitate and curate meanwhile uses and operators for the vacant units in the short to medium term	
Create the new Crieff Food Festival, plus expand the monthly market program	
Encourage more visiting market festivals	
Target the lapsed or infrequent consumers that are visiting Crieff less these days than they were pre-pandemic. Remind them how safe the town centre shopping environment is, and the many reasons to visit the town centre	
Target and facilitate a multi brand banking hub for the town centre	
Provide support to help businesses adapt and grow	
Improve connectivity to attractions and heritage assets	
Support delivery of actions and initiatives emerging from the CAP	

Healthcheck Summary

4.235 Assessing the health and vitality for Crieff is quite tricky. On the one hand the town centre appeared to be clearly on the 'up' five years ago, possibly post the Charrette initiative, extending its offer, improving the customer experience and adding more layers of appeal.

4.236 Looking at town centre and the evidence today, it seems to have gone through a considerable downturn over the last 3 years, presumably accelerated by the pandemic and national trends. It seems to have been unlucky in so much several retailers have rationalised their store networks and / or have stopped trading and closed their units in Crieff. As a result, the town centre looks poor, in decline and facing a considerable challenge to get back on its feet. This is not helped by the ongoing and long term issues impacting on the appearance and experience of Crieff, namely the volume and type of traffic passing through the centre. Removing it would possibly do more harm than good, but minimising its impact by creating other strong assets would be a positive.

4.237 Despite the recent issues, there remain lots of reasons to be positive about Crieff Town Centre going forward. Its environment, history and heritage, location, existing assets and anchors nearby and around it in the area remain positive. We would therefore conclude that if nothing is done, the town centre is likely to further decline. If on the other hand a robust, the CAP initiative can lead to a growth focussed action plan being developed and implemented, then its potential future could be a strong and positive one.

4.238 The town is already providing many of the attributes of a strong contemporary town centre, with multiple reasons to use and visit it. The services and catering offers, along with more leisure uses can be expanded and allowed to grow. There is probably scope for a stronger convenience offer, ideally in or immediately adjacent to the centre of town.

Dunkeld Town Centre

Overview

4.239 Dunkeld is a very picturesque small town that sits on the north bank of the River Tay, mid-way between Perth and Pitlochry on the main A9 to Inverness and beyond. It is a must stop on the tourist trail, with its highly regarded Cathedral and cluster of 18th century houses and cottages around The Cross, restored and owned by National Trust Scotland, but providing homes to local people.

4.240 Dunkeld is described by Visit Scotland as a lovely village. It is steeped in history, laying claim to once being the capital of Scotland, through to the home of Charles Mackintosh in his postman era, the current Telford Bridge and the aforementioned Cathedral, now still a parish church. The surrounding countryside is both spectacular and host to a wide variety of activities, from gentle walks to nature trails at Loch of the Lowes and even Land Rover Off Road Driving Experience. The tourist / visitor economy is a major factor for the small town.

4.241 In regards the primary research data captured for Dunkeld, 21 surveys were received from businesses either in or near the town centre (14 via face-to-face survey and 7 online) and of the 1,013 respondents to the household survey, only 16 residents said they use it most often for their shopping and service needs. A very low figure for statistical analysis and Dunkeld did not form part of the previous study in 2016.

4.242 The study has also reviewed the recently produced CAP for Dunkeld & Birnam. This action plan was developed after extensive engagement with local residents, businesses and community groups. It is a plan for the period 2022-2027. The CAP identified 6 strategic themes, and recommended actions for each. Much of the actions are for aspects beyond the scope of this study, however many are fully relevant, such as improving parking in Dunkeld; improved connectivity to station; improved access, paths, pavements and seating; diversify the economy; and support local businesses / start-ups.

4.243 The CAP identifies a population of circa 1,400 for Dunkeld & Birnam. The key 'likes' identified included the surrounding natural environment, safe and peaceful, family friendly, community and the attractive villages, shops and homes. Dislikes included roads, traffic and parking, housing cost / availability, broadband availability, bus / public transport and youth activities. The CAP provides a wealth of detailed actions and recommendations.

Accessibility and Environment

4.244 Dunkeld Town Centre is located on the north side of the River Tay, across Telford Bridge. The 'town centre' is primarily along Bridge Street, there are a few premises along Cathedral Street and around The Cross. Tay Terrace / Boat Road runs parallel to the River Tay, and it has a few food / beverage and accommodation businesses at the town end.

4.245 Boat Road also leads to one of the two main car parks in the town, the other being at the northern end of town, North Car Park also provides toilets and parking for coaches. Neither car park is particularly large. Parking in the car parks is subject to charges, after a free 15 minutes. There is also on street parking in the town.

4.246 The town sits to the side of the main A9 north-south route, the smaller centre of Birnam is on the southern side of the Tay, along with 'Little Dunkeld' immediately before the bridge.

4.247 Dunkeld and Birnam also benefit from being on the main East Coast railway line, with a station beside the A9 about a mile from Dunkeld Town Centre. This line provides connections to Inverness, Perth and Edinburgh, and the night train to London.

4.248 As already described the town is very picturesque, with an amazing backdrop along the river. Narrow streets (with narrow pavements), with on street parking, and the area around The Cross leading to the Cathedral is very attractive. Despite lots of cars using the on street parking the centre still feels attractive and charming. The hanging baskets were being replaced and maintained overnight during the review period. Maintaining the appeal to tourists is essential for the town's businesses.

Diversity of Uses and Retailer Representation

4.249 Dunkeld's town centre offer, at the time of the review, consisted of 50 retail / commercial properties. Virtually all of these are local (possibly regional) independents and specialists, only Co-op and Davidsons are multiple / regional operators. The review only identified one vacant unit, at the northern end of Bridge Street. The town does have an excellent 'Welcome to Dunkeld' guide and map, one of the best seen in many locations; it lists and locates circa 60 businesses, including many attractions outside of the town centre.

4.250 The offer is dominated by convenience businesses (12 units) including a small Co-op convenience store, bakers, food specialists, delicatessen, fine foods emporium. The next most dominant category would be the catering, café and restaurants (8 units). The combined food offer is of a high quality and provides a strong anchor for the small town.

4.251 The comparison goods are limited to specialist tourist and craft providers, art galleries and antiques. The hotel and accommodation offer is relatively extensive, all of which also provide dining offers. Indeed, many of the convenience operators and comparison operators also offered daytime catering. The number of service providers is low. Pubs numbered 3, take-away only just the one.

4.252 The eateries were busy of an evening with both locals and visitors.

4.253 Experian Goad do not have floorspace data for Dunkeld. Based on the observations of the place review and using measurements from ProMap, CPW Planning has estimated the comparison floorspace to be 530 sqm. and the convenience floorspace to be 570 sqm.

Customer Behaviour and Views

4.254 According to the businesses that returned surveys in Dunkeld Town Centre, their customers are mainly tourists / visitors (100% of businesses said this), local residents (67%), and people passing through (67%). Businesses also described customers as being 'affluent' (52% of businesses), or comfortable (43% of businesses).

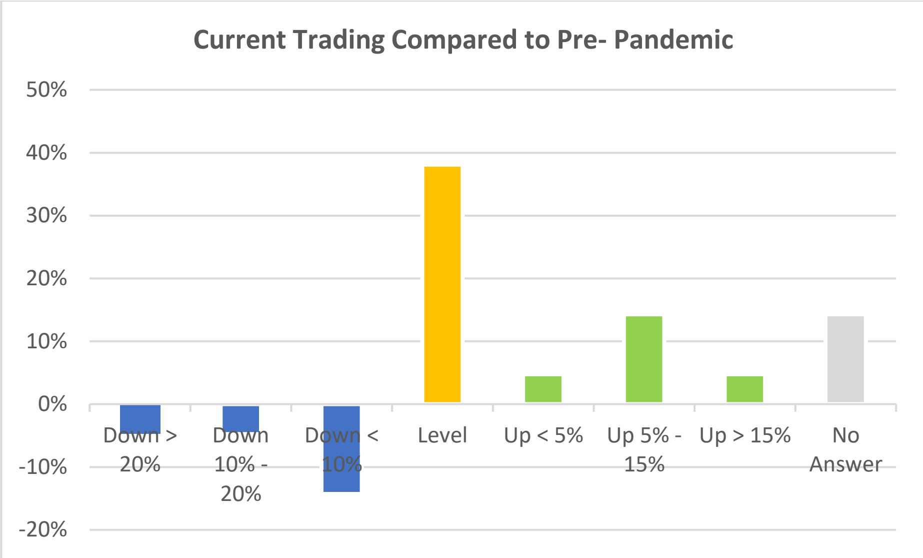
4.255 According to customers who state they use Dunkeld (a small data set of just 16 respondents) as their first-choice centre for shops and services, most are driving a car into the town (78%), and another 20% walk. The dwell time of visits is mainly either 2-3 hours (51%) or less than 30 minutes (28%). Visit frequency reflects the low number of users in survey. Infrequent visits dominate.

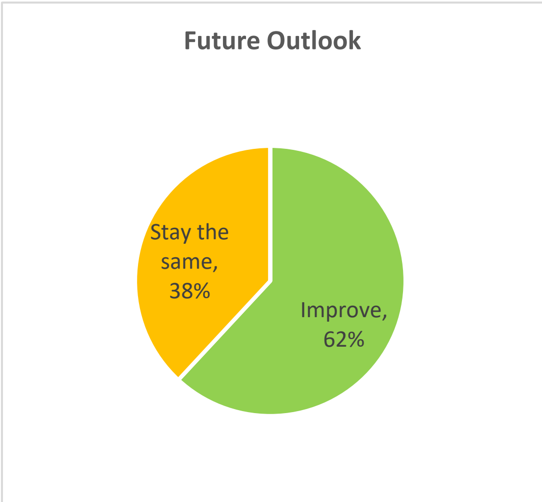
4.256 Reasons for visiting are mainly using the food shops (54%), non-food shopping (44%), and visiting cafes / restaurants (47%). 'Walking the dog' is next highest at 31%.

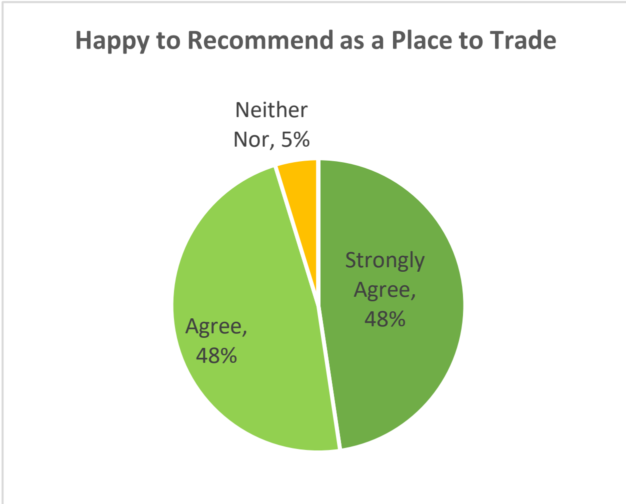
4.257 Since Covid, 67% are visiting at the same frequency, almost a third are visiting less frequently. Being close to home / convenient (44%), clean (18%) and nice environment (57%) are all likes about the centre. No daytime desired improvements were provided, while evening improvements were limited to more cafes, bars and restaurants. Most people had no required improvements. Businesses were clear that parking needs improving (81%), along with traffic management (67%) and signage (38%).

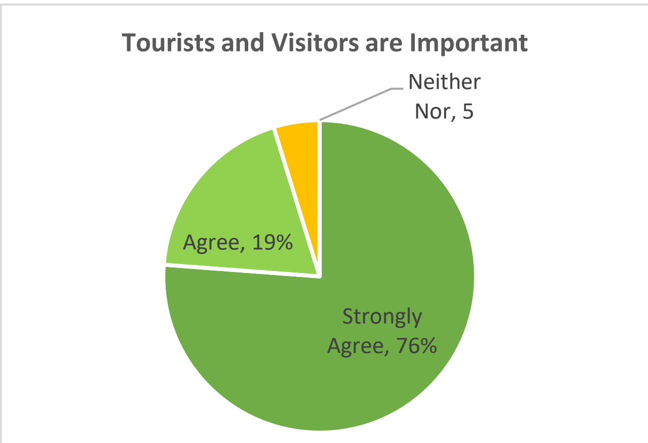
4.258 The evening visits are infrequent with 52% saying they don't visit in evenings, and those that do tend to visit monthly / less often. Reasons for evening visits are dominated by pubs / bars (77%), visiting eateries (45%) and meeting friends (38%).

4.259 The graphs below are based on the findings of the business survey. They show the performance of businesses compared to pre-pandemic trading; the business outlook; the degree to which businesses would recommend the location as a place to trade; and the importance of visitors to the centre.









Indicators of Vitality and Viability

4.260 Dunkeld is in good health, judging on the responses to the business survey and the findings of the review. Vacancy levels are low based on the review with only one vacant unit (this equates to 2%). There is clear visual evidence of businesses investing in their units, with recent fit outs and improvements visible during the review. 3 units had been trading for less than a year and 43% of businesses in the survey had been trading for less than 5 years.

4.261 The household survey responses provided a series of ratings for the town centre, as follows – town centre environment was viewed as good; range of shops viewed as good; quality of shops and public transport viewed as 'average'; and parking ratings were mixed, with good, average and poor being fairly equal.

4.262 Most operators (72%) are satisfied with the current performance of their business, only 5% dissatisfied. A higher number (90%) are satisfied with the performance of Dunkeld as a place to trade. All businesses expect business to stay the same or improve, and none anticipate declining sales.

4.263 In regards current versus pre Covid trading, about a quarter are up, 38% are level and a quarter down. 67% expect to remain in their current premises and 66% are planning to adapt their businesses or expand the range of merchandise offered (20%). None said they expected to close.

4.264 Businesses overwhelmingly would recommend Dunkeld as a place to trade (96%). A minority are concerned about future trading prospects. The vast majority 95% agree that tourists are important for the town. Almost 60% said they account for over 50% of turnover, none said they account for less than 30%. Tourists are clearly a key group for businesses.

4.265 There is no formal and readily available footfall information for Dunkeld. However, looking at the findings of the surveys and the place reviews, we would conclude that footfall numbers are at a good level in the town, both day and night-time. They may not be at pre pandemic levels yet, but they are likely to be close.

Identified Issues and Improvements

4.266 The following table provides a SWOT analysis for Dunkeld Town Centre going forward.

Figure 4.10 – Dunkeld Town Centre SWOT

Strengths	**Weaknesses**
Town is set in a super location, surrounded by picturesque countryside, super arrival route from A9	Limited parking, receives a high 'improvement' rating in survey
Town centre environment is attractive, positive; well maintained and tidy	Limited offer for locals (mentioned in business survey)
Good mix of business categories including food, non-food, catering and hospitality	Closure of Cathedral to visitors, due to tourism body activity
Town centre environment is clean, lots of visible history / heritage	Infrequent visits by locals
There is evident civic pride visible, especially the planting and flower displays, The Cross and Cathedral	Lack of insight about tourist / visitor views
Easy access and connectivity to surrounding attractions / natural environment	Service / experience offered in some hospitality venues
Good quality independent businesses, with good quality offer	On street parking impacting on town centre environment
Businesses investing in town	Lack of visible connectivity to train station and line
Strong day and nighttime food offer	Inability to expand the offer due to physical constraints / size of town
Excellent offer for visitors and tourists, given scale of centre	The desire for additional cultural activities, markets and expanded offer implies a shortage of those elements
Great sense of arrival, character, & use of local assets	Lack of service providers
Excellent printed town guide	
Compact centre	
Membership of existing tourism and business associations	
Low vacancies	
It is a genuinely nice place to be, on so many levels, an easy place to recommend	

Opportunities	Threats
Businesses would like to see more cultural attractions (52%), more events (48%) and more independent shops (38%) and more markets (33%)	Tourism and visitor numbers are reduced external impacts on visitor numbers. Reduced marketing activity by surrounding attractions
Businesses would like to see improvements to a number of customer experience aspects, including parking (81%), traffic management (67%) and signage (38%)	Closure of surrounding attractions due to cost of operating and utilities
Improve access / directional signage to river front park and family activity area	Ongoing and protracted closure of Cathedral to visitors
Provide support to businesses who are looking to adapt	Competing centres being viewed as easier to use / access / park in
Make more of the history and heritage within the town centre, these are published and online, but not featured as part of the towns offer	Improved basics offer in competing centres taking locals away from the town
Embrace the nearby tourist destinations – run joint information & promotional campaigns	Reliance on tourism for sustainability of the centre's offer
Identify opportunities for additional visitor parking and overflow shopper parking	
Coordinated customer service training	
Opportunities for pop up offers, markets and events	
Increase use of the centre by locals for pubs, services and dining. Co-ordinated promotional activity by businesses via business associations	

Healthcheck Summary

4.267 Dunkeld is clearly in good position and health when considering the findings of the household survey, business survey and objective place review. Businesses are very satisfied with it as a place to be doing business. Tourist visitors are an important customer group and clearly like to use it, and use it for a variety of reasons. The strengths and opportunities clearly outweigh the weaknesses and threats. The weaknesses and threats are focussed around the dependency on tourist visitors.

4.268 Whilst the offer is improving through investment and new arrivals, there are no obvious large scale development sites that would trigger a significant change in the mix, offer and uses of the town. Change and improvement will happen as units become available and this should be encouraged; enabling an improved offer for local residents is something to encourage.

4.269 Dunkeld has the opportunity to integrate itself further to the surrounding countryside and local assets / attractions in order to make the town an even more diverse visit. The centre could expand its services offer, or promote / expand the additional services across the river in Birnam. The key is to be able to increase the appeal whilst maintaining its charm.

Kinross Town Centre

Overview

4.270 The burgh of Kinross is located approximately half way between Perth and Edinburgh. It's located close to Loch Leven with the historic Lochleven Castle on a small island in the middle of the Loch. It has a current estimated population of 5,650.

4.271 The town historically acted as a staging post for rest, recharge and commerce. More recently it has been linked to the agricultural, light industrial and more recently the tourist and visitor sector. The town benefits from being in an area with a plethora of leisure and outdoor pursuits, including spa facilities, trout fishing, golf, shooting, walking, hot air ballooning and gliding. Given its closeness to both Perth and Edinburgh it also acts as a dormitory town for commuters to those cities.

4.272 In regards the primary research data captured for Kinross, 15 surveys were received from businesses either in/near the town centre (13 via face-to-face survey and 2 online) and of the 1,013 respondents to the household survey, only 22 residents said they use it most often for their shopping and service's needs.

4.273 Kinross has neither a Charrette nor CAP report available for the town.

Accessibility and Environment

4.274 Kinross's town centre is located on the north south traversing High Road, between the junctions of Station and Montgomery Streets respectively.

4.275 Parking is easy and plentiful, with significant free parking available on the street (1 hour), 2 hours free parking on Curate Wynd and School Wynd, as well as further longer term paid parking available adjacent to Greens of Kinross Convenience Store (first hour free). There is a park and ride station adjacent to the M90 (with local and national buses), which is on the site of the old railway station which closed in 1970. This is also beside the town's main supermarket, Sainsbury's, which is adjacent to the motorway junction and removed from the core town centre.

4.276 The pedestrian environment throughout the town centre is pleasant and well maintained on the whole, and there is evident civic pride visible, including well maintained planters and planting. The core town centre itself around the Crosswell Fountain has clearly been upgraded relatively recently to a shared car / pedestrian space and remains in an attractive and appealing condition.

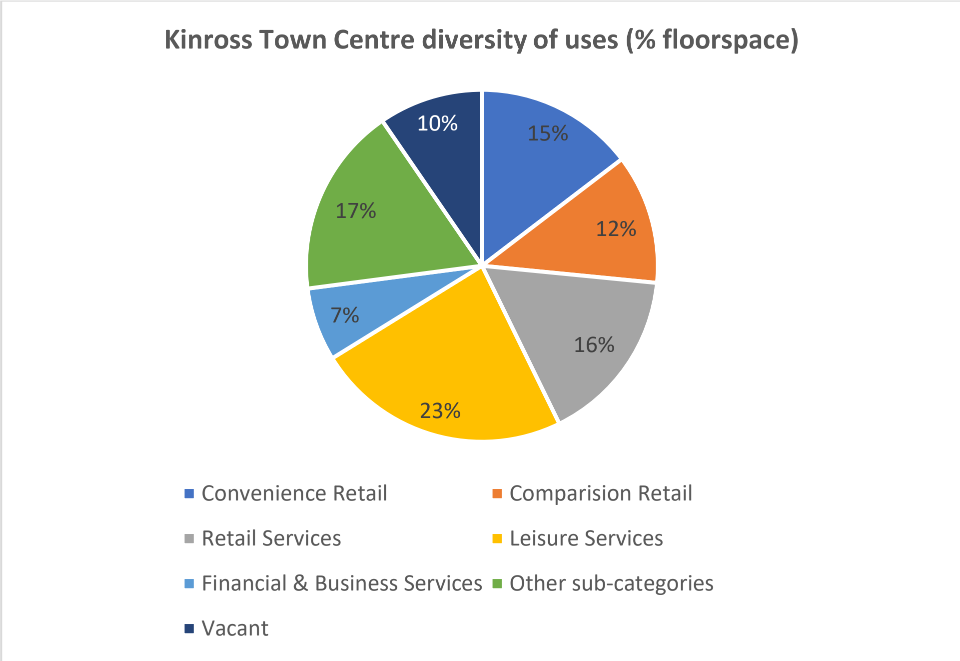
Diversity of Uses and Retailer Representation

4.277 Kinross's town centre offer consists of 40 retail / commercial units in total, of which 2 are currently vacant or seemingly non-active. All bar 2 appear to be independent businesses.

4.278 The convenience food offer is good in terms of width of offer and choice available, being dominated by Greens of Kinross (ex Co-op store, now owned by Greens, a regional Scottish food store chain), as well as a butcher, fishmonger, further convenience store and baker. The daytime food / catering offer is good, with several food styles and price points available. The evening offer is also reasonable with 2 pubs, and sourdough pizza, Chinese and Indian restaurants.

4.279 The service offer is also good including 2 hairdressers, a pharmacy, optometrist, 2 launderettes, estate agent and PC repair shop. Whilst the comparison goods offer is limited (as would be expected for a low order rural market town such as Kinross), there a few golden nuggets, including a Kilt specialist, party shop, ironmongers and pet supplies shop. The two cashmere specialists to the south of the town, beyond the former British Car auctions site, are assets but poorly integrated or signposted.

4.280 According to the latest Experian Goad survey, the town centre offers 7,172 sqm of gross floorspace, which includes 855 sqm gross of comparison goods and 1,050 sqm gross floorspace dedicated to the sale of convenience goods. The graph below shows the diversity of retail uses, services, other sub-categories, and vacancies as a percentage of the total amount of floorspace.



Customer Behaviour and Views

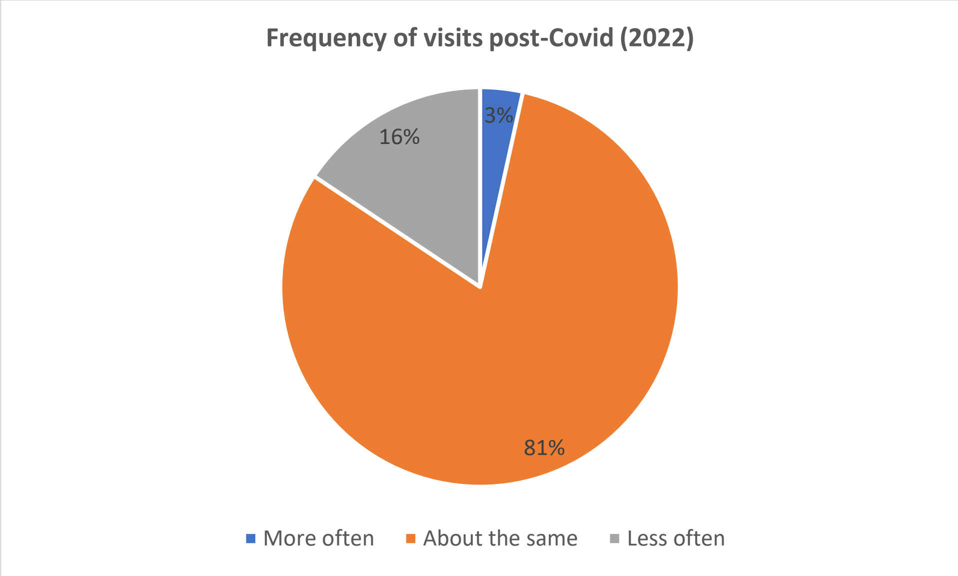
4.281 According to the businesses that returned surveys in Kinross Town Centre, their customers are mainly local residents (100% of businesses said this), tourists / visitors (67%), people passing through (47%) and local workers (40%).

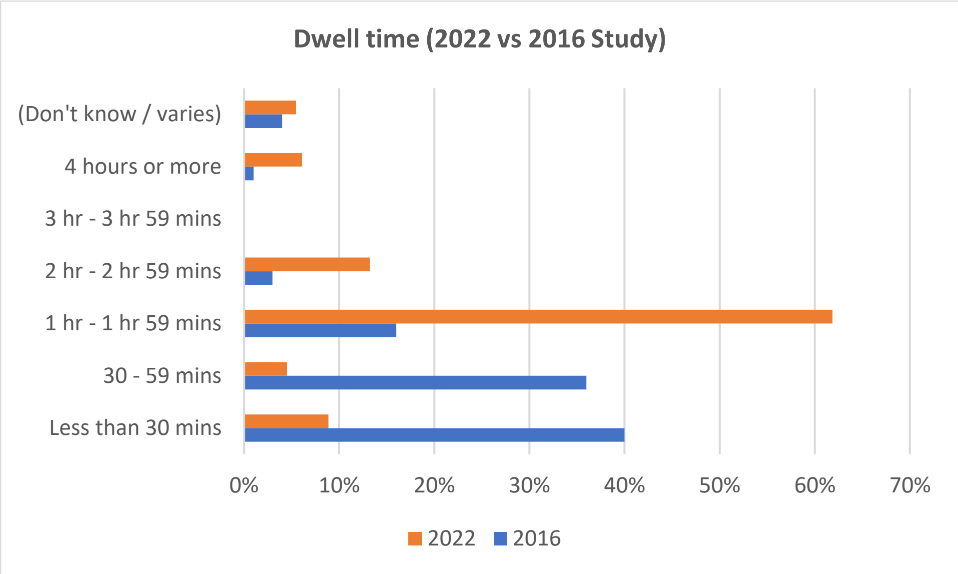
4.282 According to customers who state they use Kinross as their first-choice centre for shops and services, two thirds travel by car (and approx. one third walk), and most (62%) stay for 1-2 hours which is a notable 'dwell time' improvement on 2016 levels (when three-quarters stayed for less than 1 hour). Customers are mainly using the food (60%), financial services (35%), health services (27%) and non-food (15%) & takeaway / hot food (15%) offer in that order. Interestingly although Kinross has a reasonable choice of daytime food options, this is not a 'top 5' reason for visiting at least according to the customers picked up in the household survey.

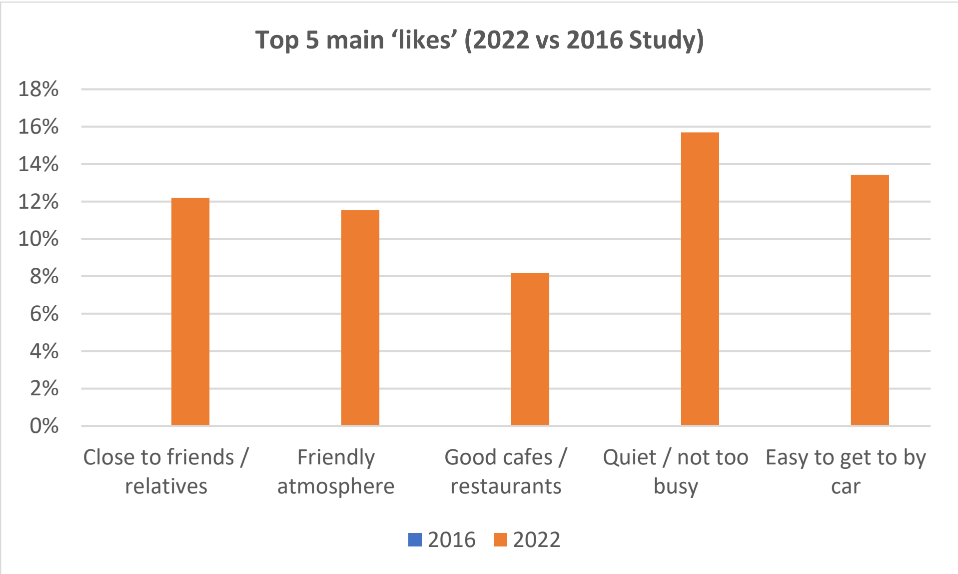
4.283 The customer frequency of visits is very mixed, with daily (16%) and weekly (16%) being the dominant responses. Having said that, the fact that it's not too busy (16%), easy to get to by car (13%), friendly atmosphere (12%), closeness to friends and family (12%), daytime food options (8%) were key likes about the centre.

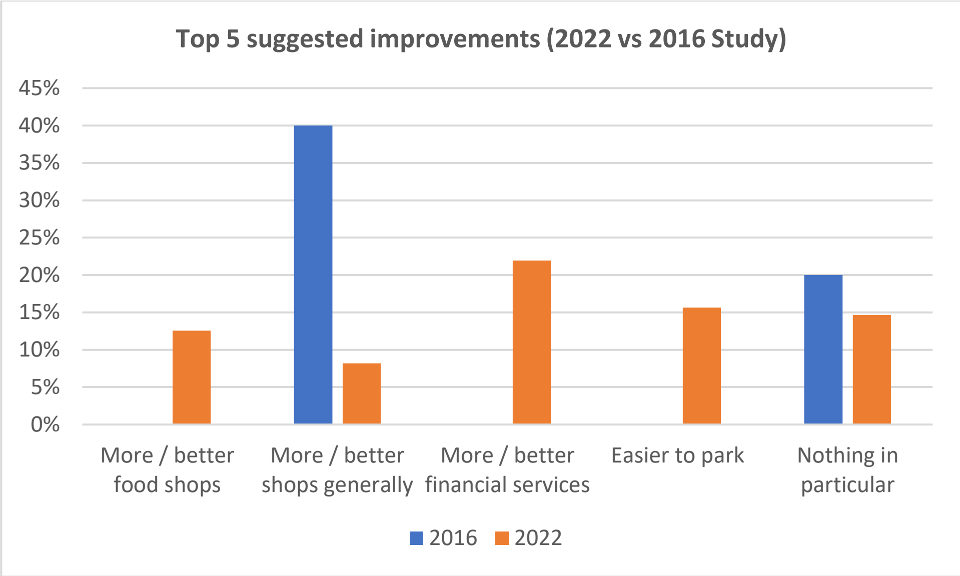
4.284 The evening visits are dominated by takeaways / hot food (43%), cafes / restaurants (22%), socialising (22%) and pubs / bars (21%). Encouragingly, some 71% of residents in the household survey visit Kinross Town Centre 2-6 times a week in the evening; whereas in 2016 around a half indicated that they 'never' visit the town centre in the evening.

4.285 We have selected some key findings from the household survey research and present these in the graphs below. They are focused on customers' frequency of centre visits post-Covid; average dwell time; the top 5 main 'likes' about the centre; and the top 5 suggested improvements to encourage them to visit the centre more often.


Frequency of visits post-Covid (2022)
3%
16%
81%
More often
About the same
Less often


Dwell time (2022 vs 2016 Study)
(Don't know / varies)
4 hours or more
3 hr - 3 hr 59 mins
2 hr - 2 hr 59 mins
1 hr - 1 hr 59 mins
30 - 59 mins
Less than 30 mins
0%
10%
20%
30%
40%
50%
60%
70%
2022
2016


Top 5 main 'likes' (2022 vs 2016 Study)
18%
16%
14%
12%
10%
8%
6%
4%
2%
0%
Close to friends / relatives
Friendly atmosphere
Good cafes / restaurants
Quiet / not too busy
Easy to get to by car
2016
2022



4.286 Given the limited number of business survey responses, no graphical representation of the findings for Kinross are provided.

Indicators of Vitality and Viability

4.287 Kinross appears to be in good health. The current vacancy level of 5% is low. Retailers are investing in their units and appear to be motivated given the good levels of shop fit on display. Most customers are visiting at the same frequency as pre Covid (81%) with a few visiting less (16%).

4.288 The majority of businesses are well established and have traded in Kinross for at least 5 if not 10 years. Most operators (67%) are happy with the current performance of their business, and a similar amount (73%) are happy with the performance of Kinross as a place to trade.

4.289 In regards current versus pre Covid trading, about a third are up, a third level and a third down. In regards future prognosis it's a very similar pattern, with 40% expecting future performance in 2 years to be the same, with 27% expecting improved performance and 27% expecting a decline. 80% expect to remain in their current premise and or expand the range of merchandise offered (20%). Only one said they expected to close.

4.290 Businesses overwhelmingly would recommend Kinross as a place to trade (73%), agree it needs to be more family friendly (46%) and that tourists & visitors are important for the town (80%).

4.291 There is no readily available footfall data for Kinross, yet levels would appear to be reasonable, albeit probably below those achieved pre pandemic.

Identified Issues and Improvements

4.292 The following table provides a SWOT analysis for Kinross Town Centre going forward.

Figure 4.11 – Kinross Town Centre SWOT

Strengths	**Weaknesses**
Motivation of businesses is good on the whole	Some of the private realm is in poor condition
Town centre environment is positive; well maintained and tidy	Nearby leisure / tourist offers are not embraced in the town centre
Good mix of retail categories including food, non-food, services and catering	Kinross's 'place' appeal is not being celebrated. The customer arrival and experience is somewhat underwhelming
Town centre environment is clean and appealing, especially around the historic fountain	Public transport is not especially good (indeed rated 'good' by just 1% of residents in the household survey. There is no train line, and the main bus interchange is located out with the town centre
There is evident civic pride visible, especially the planting and flower displays	Main foodstore is detached from the centre, and lack of integration of the cashmere outlets
Easy and plentiful car parking	
Distinctive retail offer, dominated by local independent businesses	
The town is located in an area with many destination leisure activities and attractions available nearby	
Business satisfaction with own performance and centre performance	
Cashmere outlets to the south of the town	
Opportunities	**Threats**
Encourage more events and local celebrations	Potential decline in performance as more consumers return to shop at the higher order centres
Encourage private landlords on the High Street to invest in and maintain the frontages of their properties	Cost of living crisis encourages more consumers to shop at out-of-town discount food and non-food stores
Customers want more financial services, easier to park, better food shops and more / better shops in general	High cost of utility bills for small businesses reduces their ability to trade profitably
Customers would also like a community cinema in regards improvements to the evening economy	Continued closure of local visitor and tourism attractions, impacting on visitor numbers and dwell time in the town and town centre
Build on the occasional existing market offer	Further out of centre development
Embrace the nearby tourist destinations – run joint information & promotional campaigns	
Businesses want more independent stores (60%), more / better events (40%), more / better leisure facilities (33%), more shops overall (27%) and more parking (27%)	
Businesses want a variety of improvements including improved parking (60%), more customer toilets (53%), improved pavements / more customer seating / more trees & greening and more / better CCTV (all at 33%), cleaner & tidier / improved signage / better access to shops and better traffic management (all at 27%)	
A majority of businesses (47%) would be interested in joining a business association if one were to be created. 20% said they are not interested	
Increased promotion of town centre at motorway exit and at Sainsbury's / park and ride	
Increase promotion and connectivity to the cashmere outlets	

Healthcheck Summary

4.293 Overall, it would appear from the findings of the place review, business survey and household survey that Kinross is in a good state of health, is thriving and well placed in regards future trading prospects.

4.294 Kinross is well positioned to adapt to emerging place trends, indeed it is already doing so, given the fairly recent arrivals of new coffee and hair & beauty businesses. Improving its connectivity to wider facilities will help it to achieve a more multi-purpose visit.

4.295 There are no urgent or pressing development sites that need addressing, occupying or developing, other than the tatty looking former pub building fronting onto Burns-Begg Street. The former British Car Auctions site is removed from the centre, but closer than the existing Sainsbury's outside the town centre. It could provide an opportunity for a variety of uses that may generate additional footfall and visits to the town centre, and possibly improve access to the waterfront of the loch.

4.296 The town would benefit from the reopening of Loch Leven Pier and Lochleven Castle along with better signage and events to integrate the town centre with these two appealing and adjacent offers.

Pitlochry Town Centre

Overview

4.297 Pitlochry is the northern most town included within this study. It is justifiably a recognised tourist destination in its own right as well as being part of the Edinburgh, Perth and Inverness tourist route. The current resident population is estimated to be 3,800 (according to the CAP). Clearly the town's offer is not supported by this size of resident base.

4.298 Pitlochry's rise to prominence was triggered by two events, the first being the building of the military road by General Wade in the early 1700's, the second event to put the town on the map and marked it as a destination to visit was Queen Victoria staying in nearby Blair Castle. This was soon followed by the opening of the railway line and station in the town centre in the 1860's.

4.299 The town successfully retains its air of solid Victorian splendour for the many shops, hotels and hospitality venues, many of which still retain the classic wrought iron and glass canopies over the pavements, providing some cover to the occasionally inclement weather. The impressive Atholl Palace Hotel adds to the grandeur of the mountain skyline as travellers approach the town. The surrounding area is referred to as 'Big Tree Country'.

4.300 The town sits beside the River Tummel with its hydroelectric dam, bridge and fisheries. The surrounding countryside provides a host of leisure attractions, from golf courses to fishing, walking, climbing and hiking. Faskally Forest is north of the town and is home to Pitlochry's Enchanted Forest, the location for a major tourist visit event, attracting circa 80,000 visitors during each October. There are even 12 beaches to use near this inland town.

4.301 In regards the primary research data captured for Pitlochry, 28 surveys were received from businesses either in or near the town centre (27 via face-to-face survey and 1 online) and of the 1,013 respondents to the household survey, 50 residents said they use it most often for their shopping and service needs. Both response sets provide a good base for analysis.

4.302 The study has also reviewed the recently produced CAP for Pitlochry. This action plan was developed after extensive engagement with local residents, school pupils, businesses and community groups. It is a plan for the period 2022-2027. The CAP identified 6 strategic themes, and recommended actions for each. Much of the actions are for aspects beyond the scope of this study. However, many are fully relevant such as improving access, traffic management and parking in Pitlochry; improved arts culture and events; improved access, paths, pavements and seating; diversify the economy; and support local businesses / start-ups, economy and housing, as well as environment and sustainability.

Accessibility and Environment

4.303 Pitlochry is located to the north east of the A9 main trunk route to Inverness and the north. Indeed, the original A9 would have passed through the town centre, the new road being a by-pass. The town also benefits from the mainline station connecting Pitlochry to Perth, Edinburgh, Glasgow and London. The River Tummel is adjacent to the town.

4.304 Vehicle access is easy, there are a number of local and regional bus services running through the town centre and judging by the queues at bus stops they are popular. There is also an extensive coach parking area beside the railway station. There are a number of car parks in the town, including Station Car Park, charged by the hour, with £1.50 for two hours. Ferry Road, Athol Road, Rie-Achan Road all offer 2 hours free parking and collectively provide over 250 spaces. Residents in the household survey view parking availability as average to poor (65%) with only 20% saying good. This is in line with the 2016 results. Public transport has a stronger poor rating (37%), with responding 34% don't know and 16% saying good (there is no comparison to 2016). 57% of businesses asked for improved parking facilities, although this was not the top improvement area, which was toilets (79%).

4.305 The environment of Pitlochry Town Centre is very pleasant. The quality and maintenance of most of the buildings adds to the appeal, and the Victorian canopies and the quality of the wider public realm are all strengths for the town. Businesses are also clearly making an effort, with quality window displays making a difference and a strong visual statement. The paving was clean and in good order, although the waste bins would benefit from being replaced / improved.

4.306 The town benefits from many active frontages, including large hotels, local department store and even larger catering establishments. There are also a number of smaller green spaces, including the park and the area leading to the Old Mill Inn. These can however be a little lost amongst the larger more impactful buildings and shop fronts.

4.307 Residents view the town centre environment very positively with 84% rating it as good to average. The environment was the third most liked aspect at 20%; improvements were focused on the offer, not the environment. Businesses felt the town could benefit from improved traffic management (46%), improved signage (39%) and improved pavements (36%).

Diversity of Uses and Retailer Representation

4.308 Pitlochry is a town with a clear focus on the tourist and visitor economy. The offer is primarily along Atholl Road from the junction with Rie-Achan Road to the Atholl Road car park. The town has a substantial offer. Experian Goad list the town centre as having 117 units in total although this will include non-active / non-retail units, which doesn't seem a large number given the length of the main town centre area. However, many businesses consist of large premises with long active frontages.

4.309 The business mix includes both national multiple chains, particularly the outdoor goods brands such as Nevis Sports, Hawkshead, Edinburgh Woollen Mill and Mountain Warehouse, and of course Co-op foodstore. Other multiples include WH Smith, Premier convenience store, Greggs and several banks. However, the majority of businesses are independents, with many targeting the visitor market. Anchors for the town include the hotels, Co-op, MacNaughtons Department Store, The Old Mill Inn and the collective of gift shops.

4.310 The review identified 31 comparison goods shops, including 9 tourist gift and gallery shops. There are only 7 convenience stores, but this includes a fine butcher and a whisky specialist (there are two distilleries close to the town). The catering offer is strong with a good mix of large eateries and smaller coffee shops / cafes. This is supported with 5 hotels close to the town centre. The services and health and beauty offer includes 13 outlets. The renowned local theatre Pitlochry Festival Theatre (one of the best in Scotland apparently) has a dedicated booking facility / ticket office.

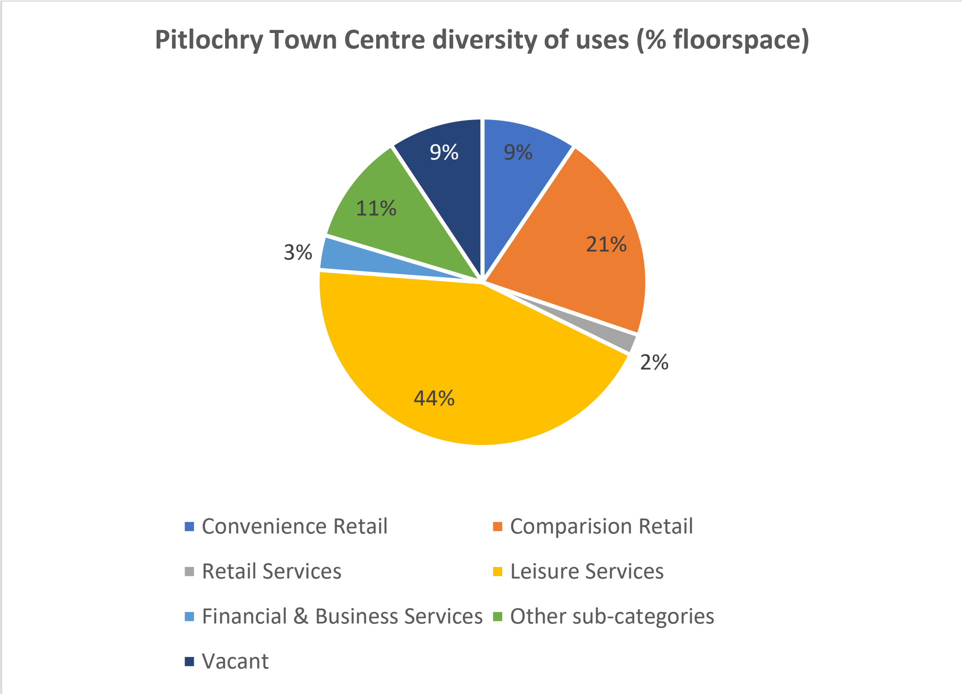
4.311 The formal leisure offer consists of a gym. The Festival Theatre (with a ticket office in the town) is outside the town centre across the River Tummel. There is no cinema in the town, however the town is surrounded by active leisure facilities.

4.312 There is a monthly market between April and October, held on the third Saturday of the month, just off Armoury Road, close to Rie-Achan Road car park. There is also a Christmas Market.

4.313 The review identified only 7 vacant units representing only 6%[5], although its feels like it should be smaller as these were often small units. There is one high profile vacant unit which looks to have been vacant for some time. It doesn't feel as though vacancies are an issue in the town. At least two units had recently been fitted out and more were being updated. From the business survey, 61% of businesses had been trading for over 6 years, and 25% less than 5 years. 3 businesses opened within last year.

4.314 Experian Goad identify that Pitlochry has 22,483 sqm gross of total floorspace, of which 4,664 sqm is comparison goods and 2,127 sqm is convenience goods. The graph below shows the diversity of retail uses, services, other sub-categories, and vacancies as a percentage of the total amount of floorspace. Almost 45% of the centre's floorspace is dedicated to leisure services, which includes catering and the gym.

[5] The most recent Experian Goad survey of December 2021 identified a floorspace vacancy rate of 9%.



Customer Behaviour and Views

4.315 According to the 50 local residents in the household survey who state they use Pitlochry as their first-choice centre for shops and services, almost half are visiting at least weekly. Half are visiting at the same frequency as pre Covid, 8% are visiting more and 40% are visiting less often.

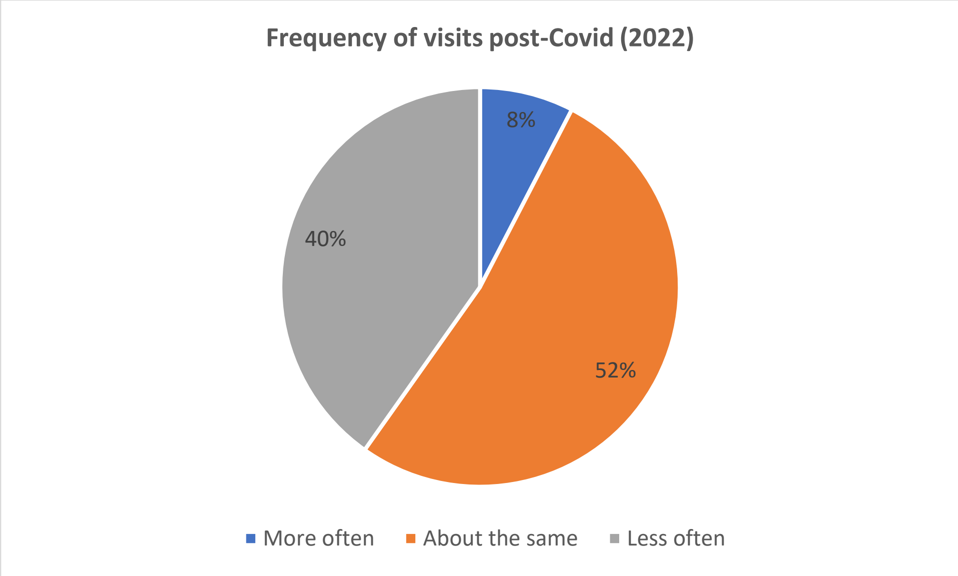
4.316 Nearly 80% are travelling in by car, mainly as the driver (58%). This is as per 2016. The number of people walking into the town has fallen from 2016 (33%) to today at 12%. The dwell time of visits is in the range of less than 30 minutes to up to two hours, accounting for 80% of visits. In 2016 the visit duration was dominated by the 1-2 hours period (50%).

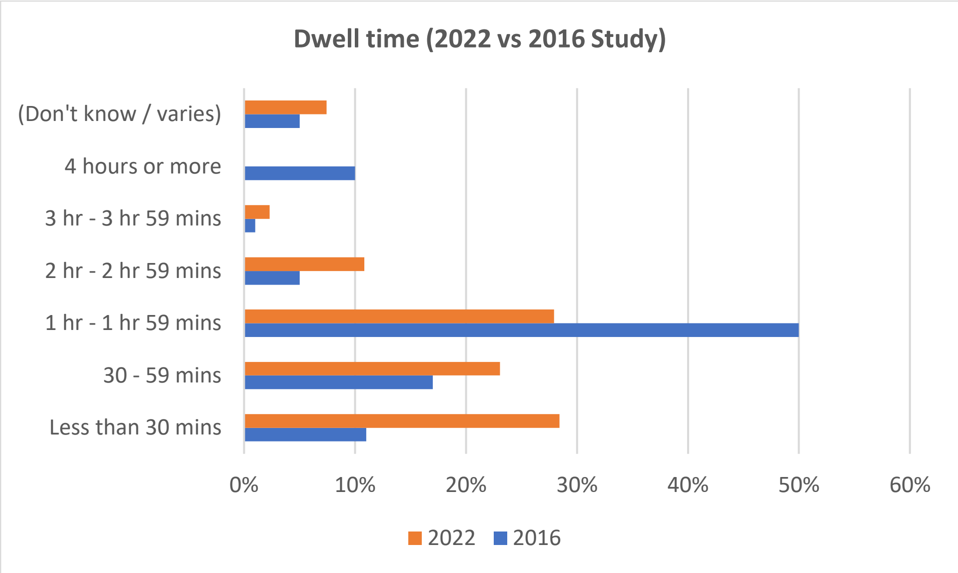
4.317 The reasons to visit are dominated by food shopping at 77% (39% in 2016), then visiting restaurants and cafes at 28% (not featured in 2016), and a smaller percentage of 22% cited non-food shopping (as per 2016). The main 'likes' about the town are 'close to home' (36%) and 'attractive environment' (20%) and 'friendly' (13%). All similar to 2016. 27% said nothing in particular, as per 2016. As for suggested improvements, half gave no view but of those that did, the most common responses were more / better food shops (19%) and more shops generally (22%). This is broadly in line with 2016 for more shops and nothing in particular.

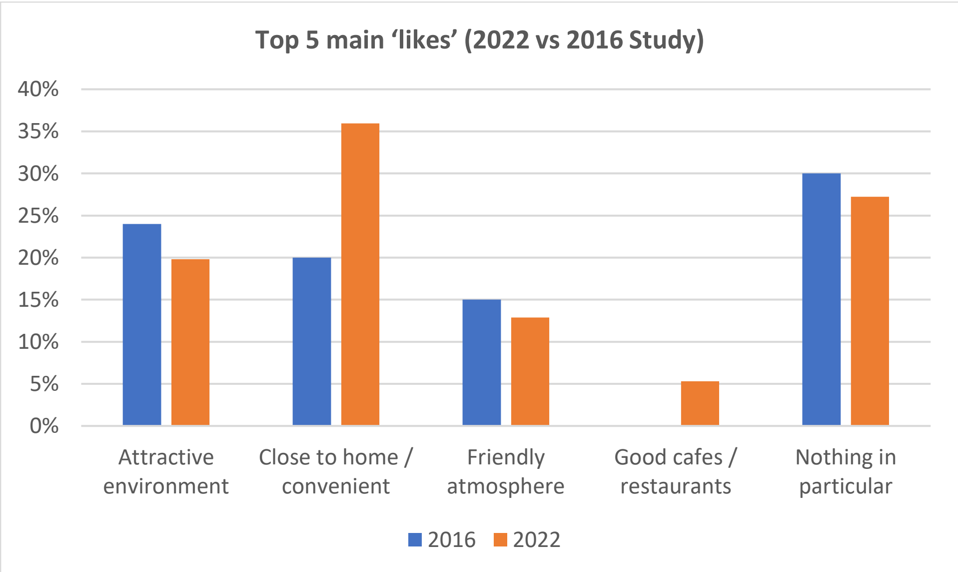
4.318 The majority of household respondents don't use Pitlochry for evening visits (71%), which is up on the 2016 (32%). Of those that do it's for cafes (40%) and non-food shopping (21%). Suggested improvements were limited, with most (83%) providing no suggestions.

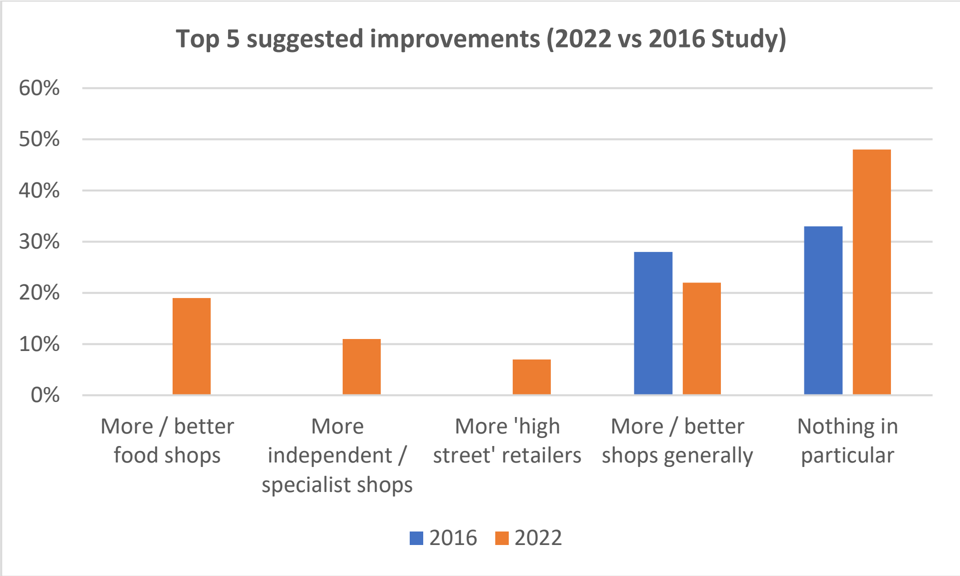
4.319 In terms of overall ratings, the residents view the range and choice of shops as average (52%), poor (41%) and only 7% as good. In 2016 the ratings were fairly even. The quality of shops is viewed more positively, 43% as good, 44% as average and 10% as poor. This does suggest the residents feel the town has little to offer them.

4.320 We have selected some key findings from the household survey research and present these in the graphs below. They are focused on customers' frequency of centre visits post-Covid; average dwell time; the top 5 main 'likes' about the centre; and the top 5 suggested improvements to encourage them to visit the centre more often.


Frequency of visits post-Covid (2022)
8%
40%
52%
More often
About the same
Less often


Dwell time (2022 vs 2016 Study)
(Don't know / varies)
4 hours or more
3 hr - 3 hr 59 mins
2 hr - 2 hr 59 mins
1 hr - 1 hr 59 mins
30 - 59 mins
Less than 30 mins
0%
10%
20%
30%
40%
50%
60%
2022
2016


Top 5 main 'likes' (2022 vs 2016 Study)
40%
35%
30%
25%
20%
15%
10%
5%
0%
Attractive environment
Close to home / convenient
Friendly atmosphere
Good cafes / restaurants
Nothing in particular
2016
2022

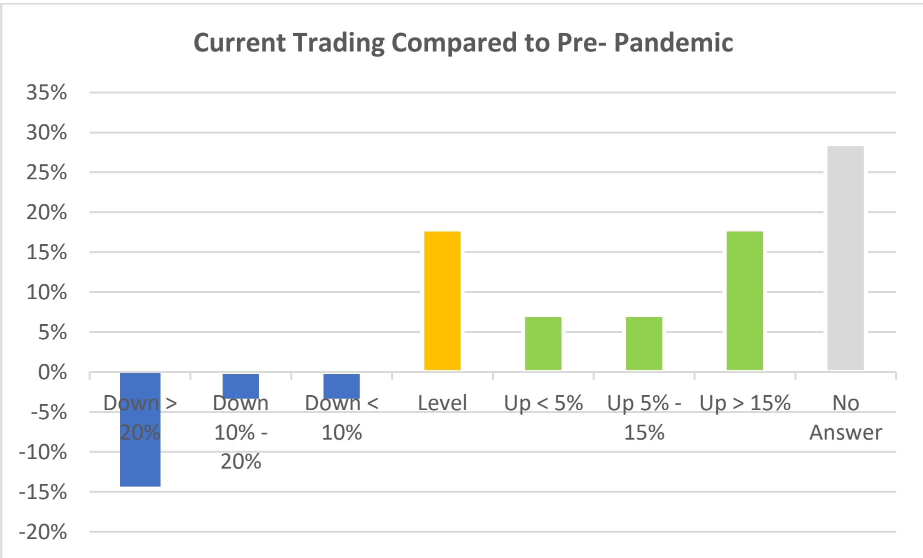


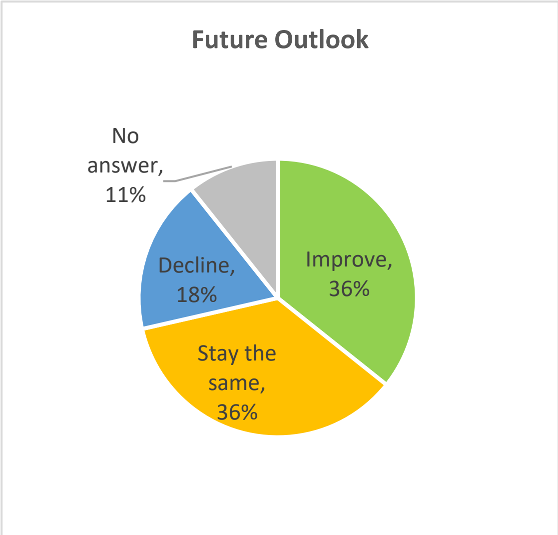
4.321 According to the businesses that returned surveys in Pitlochry Town Centre, their customers are mainly tourists / visitors (93% of businesses said this), local residents (71%), people passing through (64%) and local workers (43%). Businesses also described customers as being comfortable (29% of businesses) or on a budget (25% of businesses). Over 50% of businesses said that more than half of turnover is from tourists / visitors.

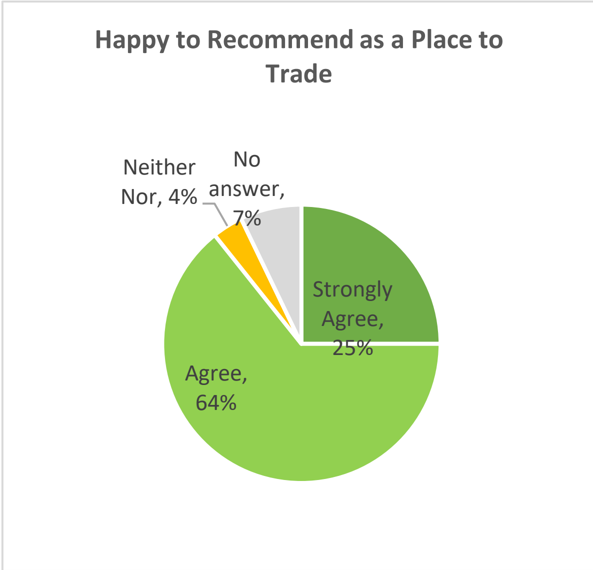
4.322 Businesses would like to see improved offers in following categories: more independent shops (64%), more leisure facilities (54%), more events (39%), more cultural attractions (39%) and more shops overall (34%).

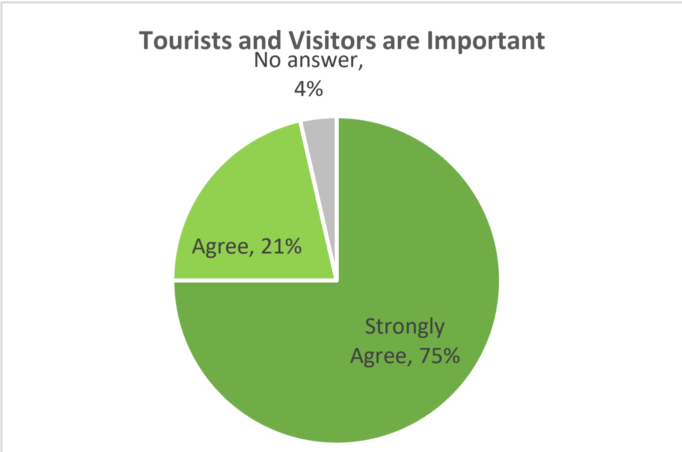
4.323 In terms of customer experience businesses were clear that more customer toilets are needed (79%), parking needs improving (57%), along with traffic management (46%) and signage (39%).

4.324 The graphs below are based on the findings of the business survey. They show the performance of businesses compared to pre-pandemic trading; the business outlook; the degree to which businesses would recommend the location as a place to trade; and the importance of visitors to the centre.









Indicators of Vitality and Viability

4.325 Pitlochry is in good health, according to the business survey and the findings of the review. Vacancy levels are low based on the review with only seven vacant units (6%). There is clear visual evidence of businesses investing in their units, with recent fit outs and improvements visible during the review. 3 units had been trading for less than a year. No businesses said they plan to close or move away, 64% plan to stay as they are, 75% plan to adapt to improve performance, and 11% want to relocate within Pitlochry.

4.326 Most operators (75%) are satisfied with the current performance of their business, only 11% dissatisfied, and a similar number (76%) are satisfied with the performance of Pitlochry as a place to trade. 72% of businesses expect business to stay the same or improve; only 18% anticipate declining sales. In regards current versus pre Covid trading, a third are up, 18% are level and a fifth are down.

4.327 Businesses overwhelmingly would recommend Pitlochry as a place to trade (89%). Businesses are not overly concerned about future trading prospects. The vast majority (96%) agree that tourists are important for the town. Many residents are still visiting frequently and based on a lack of demand for improvements, they are fairly content (although still with a desire for more) with the offer and experience.

4.328 There is no readily available footfall information for Pitlochry. Based on the findings of the surveys and place review it is clear that footfall is at a reasonable level in Pitlochry. The key driver will be the tourist and visitor numbers, and these are clearly returning to strong levels even if not yet pre pandemic levels.

Identified Issues and Improvements

4.329 The following table provides a SWOT analysis for Pitlochry Town Centre going forward.

Figure 4.12 – Pitlochry Town Centre SWOT

Strengths	**Weaknesses**
Super location, surrounded by picturesque countryside, super arrival route from A9	Desired improvements from businesses for events, leisure provision, cultural activities
Easy access via car, bus, train and coach	Limited offer for locals (mentioned in business survey)
Town centre environment is attractive, positive, well maintained and tidy	Dependence on tourist visitors
Good mix of business categories including food, non-food, catering and hospitality	Lack of toilet facilities
Town centre environment is clean, lots of visible history / heritage	Limited and declining evening usage by residents
There is evident civic pride visible, especially the park and maintenance of large buildings	Lack of wider uses in town centre
Easy access and connectivity to surrounding attractions / natural environment	Parking is identified as weakness by residents and businesses
Good quality independent businesses, with good quality offer	
Businesses are investing in town	
Strong day and nighttime food offer	
Excellent offer for visitors and tourists	
Established tourist destination and stop off point	
Lots of attractions, incl highly regarded theatre	
Monthly market, in peak season	
Low vacancies	
Business performance and outlook	
Opportunities	**Threats**
The businesses would like to see better leisure facilities (54%), more cultural attractions (39%), more events (39%), more independent shops (64%) and more markets (33%)	Tourism and visitors are important to the local community / business community, external impacts on visitor numbers. Reduced marketing activity by surrounding attractions
Businesses would like to see improvements to a number of customer experience aspects, including more / better toilets (79%), improved parking (57%), traffic management (46%) and signage (39%)	Closure of surrounding attractions due to cost of operating and utilities
Improve access / directional signage to theatre and river frontage / dam	Continued loss of appeal to local residents
Provide support to businesses who are looking to adapt	Lack of opportunities for existing businesses to expand or relocate in the centre
Opportunities for pop up offers, markets and events. Identify optimum uses for vacant properties, including the apparent long-term unit	Reliance on tourism for sustainability of the centre's offer
Embrace the nearby tourist destinations – run joint information & promotional campaigns	Opportunity to increase offer to local residents
Identify opportunities for additional visitor parking and overflow shopper parking	
Increase use of the centre by locals for pubs, socialising and dining. Co-ordinated promotional activity by businesses via business associations	
Dedicated promotions, events and activity for local residents, both in peak season and out of it	
Improve bins, and improve impact of existing town green spaces / more rest points	

Healthcheck Summary

4.330 Given the findings of the household survey, business survey and place review it is fair to say that Pitlochry is in good health. Businesses report good levels of trade with 56% trading level or up on pre Covid levels (only 22% are down). Furthermore, businesses are very satisfied with their performance and that of the town, and they would recommend it as a place to trade.

4.331 Residents report a reasonable visit frequency with over half visiting at least weekly. Pitlochry is an established tourist destination and stop off point. It is catering well for the visitor, from shops, eateries and hospitality. The environment is appealing and complements the super local natural environment.

4.332 There is a little concern that the town may be losing its appeal to local residents, although they are using it for food and general shopping. Additional effort to increase the appeal, both day and evening appeal, to the local resident would be worth its while.

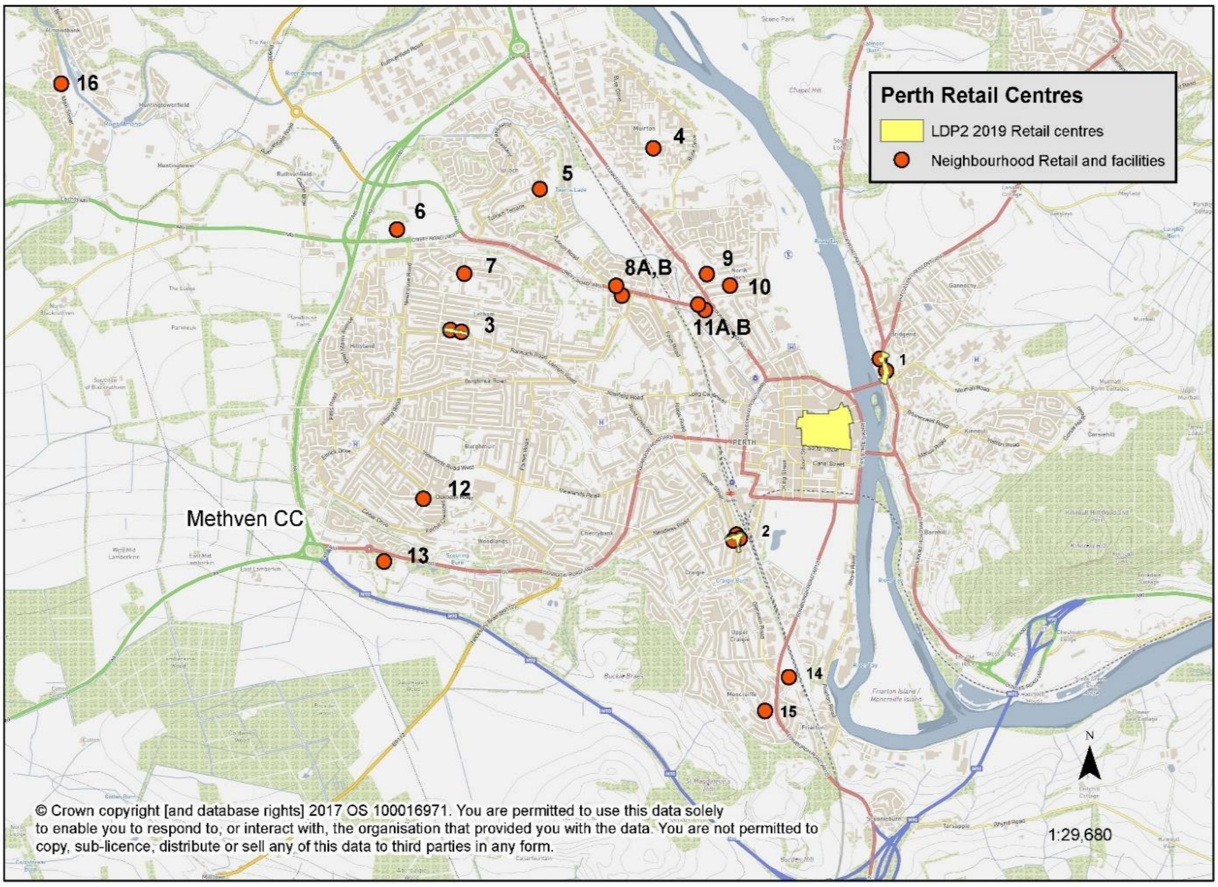
4.333 Pitlochry is a strong visitor destination centre, and as such may be less impacted by the emerging trends for general places. That said, the consumer is looking for experiences and Pitlochry needs to continue to expand on the level of experiences it offers. Its benchmarks are other leading visitor locations. It also needs to ensure it retains the visits from existing residents, so the services, convenience and catering offers will need to adapt to their needs as well.

5. Perth's Neighbourhood Centre Reviews

5.1 This section includes a review of the neighbourhood centres in the wider Perth City area, as identified by PKC and shown in Figure 5.1 below. The review has been completed as a desk based exercise for the majority of the neighbourhood centres, although a number have also been visited during the course of the study, whilst visiting and accessing the main centres.

5.2 The desk based review has used Google Maps, Street View and satellite imagery of the neighbourhood centres to identify the current mix / offer and surrounding area. This has included checking recent listings for current trading status for many businesses. The virtual sources are typically imagery / information dated as being from 2021 and 2022, and are therefore considered to be up-to-date and reliable.

Figure 5.1 – Location plan of the Neighbourhood Centres



5.3 The findings of the desk based review are reported in table form below (Figure 5.2). The numbers on the plan (see Figure 5.1 above) correlate to the location numbers in the table. The neighbourhood centres range from small parades or clusters of small shops to single large foodstores / supermarkets. Each of the centres have substantial 'walk in' catchments (given their location within or adjacent to predominantly residential areas) and some also provide significant opportunities for passing-trade due to their prominence and position along a main aerial route.

5.4 The aim of the review is to identify those centres that are robust and sustainable, and those that are weak and in need of intervention and support. We also look to identify a strong proven mix of offers to assist in future planning controls and policies.

5.5 The following table (Figure 5.2) summarises the findings of the neighbourhood centres review.

Figure 5.2 – Overview of the Neighbourhood Centres

Location Number	Location Name	Offer / Mix (type and number of units)	Comment / Hinterland
1	Bridgend	Hair & beauty 4, Services 7, F&B 3, Take-away 2, Pub 2, Co-op foodstore (anchor) post office, pharmacy and dentist. Vacant 3	The only centre east of River Tay. It is a main access, arterial route, 2 car parks, continuous active frontages (on one side). No reason to contract, will continue to trade given its location, catchment and ease of access / visibility to passing traffic. Bridgend is also the focus of a Charrette report completed in 2014, looking at physical interventions to improve its sense of place and ease of use.
2	St Leonards Bridge / Abbot Street	Hair & beauty 4, Take-away 5, Florist, estate agent, pub, small convenience store, launderette. Vacant 2	Arterial route intersection, visible new investment. A small cluster not a 'centre' with a recognised anchor but has school and residential hinterland. H&B and TA indicators of sustainable nature of location. South of city centre and disconnected from it.
3	Rannoch Road	Take-away 4, Hair & beauty 3, Co-op foodstore, second convenience store, baker, betting, pub, pharmacy. Vacant 1	Established 'local' centre. Includes a Council office, parking, residential hinterland. Has a clear anchor foodstore offer. Reasonable sustainable indicators. West of city area.
4	North Muirton	Take-away 3, Co-op store including a post office, pub and hair & beauty Possibly 1 or 2 vacant units	Purpose built local centre, lacking choice, limited impact for businesses. Co-op has recently been refurbished. Would benefit from intervention, more H&B and services / pharmacy would be a benefit. Surrounded by residential.
5	Tulloch Road	Convenience stores 2 including refurbished Co-op, Take-away, hair & beauty	Limited offer, lots of residential, playground, church and parking nearby. Purpose built, limited offer, needs more offer, probably more of same.
6	Crieff Road	Tesco Extra, PFS, associated services from major food brand	Close to City ring, arterial road location. Major destination, with the Tesco Extra securing about 16% of 'main food' convenience goods expenditure from the Perth catchment zone as well as almost 12% from the Highland Area zone. B&Q opposite, which is the dominant DIY store in the

			Perth and Kinross catchment area (attracting a DIY and hardware goods expenditure market share of about 43%). Robust and here to stay.
7	Garth Avenue	CTN, Second hand 2, Vacant 1, Office	Has a school nearby, a church and a playground. Purpose built units. Close to Tesco at 6. Perilous state. H&B and TA would be positive additions for sustainability.
8 A&B	Fairfield, two overlapping centres identified	Very limited offer Destination standalone Farm Foods store. On opposite side of road, convenience store and a charity office	Not really a 'centre', certainly not two centres. On the A85 Crieff Road. Drive by location, not a 'centre' as such.
9	Dunkeld Road A912	Large Asda store, plus PFS, George and pharmacy. McDonald's is adjacent. Note north of the identified centre is a parade of shops with C store 2, betting, barber, baker, Post-Office and take-away. Premises occupied, parade in good health	Strong destination Asda, securing about 15% of 'main food' convenience goods expenditure from the Perth catchment zone as well as almost 14% from the Highland Area zone. Nearby parade is a centre, albeit not identified as such on the plan provided.
10	Balhousie	A single convenience store, no other premises nearby.	Residential hinterland, school. Close to Asda, this convenience store is in peril.
11 A&B	Two overlapping centres at junction ofA912 Dunkeld Road and A85 Crieff road	A destination paint shop, Hair & beauty 3 at southern part. On A85, offer is take-away 4, convenience store, CTN, F&B / take-away (former Farmfoods store)	Arterial route Residential Commercial and B&B's
12	Oakbank Road / Alder Drive	One convenience store, now McColl's (was Co-op)	A very limited offer given distance from other parades. Needs a stronger offer. Surrounded by residential.
13	Motorway / ring road services	Broxden services, Travelodge, F&B 2, Take-away 2 convenience 1, and Spar is closed (part of PFS)	Priority for local services to be location 12. This is a transport stop.
14	A912 south, Glenearn / Moncreiffe	Tesco Superstore and PFS. Standalone unit. No local shops attached / linked	Commercial hinterland, business centre, offices. The centre's Tesco Superstore is a popular main food shopping destination, attracting a 19% market share from the Perth catchment zone.
15	Moncreiffe, Glengarry Road	Take-away 2, Charity shop, Convenience store	Lots of established residential. Close to Tesco, but not adjacent. Struggling, perilous situation, may not survive.
16	Almondbank, Main Street. Outside the ring road. Northwest of city	A pub and a post office	Residential hinterland. Not a centre, the pub and PO are separated by housing.

5.6 The stronger neighbourhood centres are those with a reasonable convenience offer (as an anchor), supported by a hair and beauty offer, a selection of services providers (as daytime footfall generators), and a take-away offer (for both day and night-time business).

5.7 Centres close to major foodstores, particularly those that don’t have the offer outlined above, are struggling to maintain vitality.

5.8 Location numbers 1, 2, 3, 9 and 11 are in reasonable health and vitality. Location numbers 4, 5, 7, 8, 10, 12, 15 and 16 are in need of improvement and support. The uses identified as part of ‘stronger neighbourhood centres’ should be encouraged.

5.9 Locations 6, 9, 13 and 14 are destination status and need no further offer, indeed increased offers in these locations may impact on the vitality and future sustainability of the other neighbourhood centres.

5.10 Looking at the mix and variety of local ‘neighbourhood centres’ across the wider city area, it is evident that many national trends are visible and at play. Those that are close to large dominant food stores, that do not have a separate critical mass of units and variety of offer, are struggling to maintain an offer.

5.11 The smaller ‘localised’ centres that have a local catchment / customer base tend to be more resilient to competitive pressures and Covid-19 impacts as more people worked from or close to home and/or chose to shop locally where possible. In this respect and considering the principles of 20-minute neighbourhoods, the existing network of neighbourhood centres in Perth play an important role in terms of promoting local businesses and encouraging more sustainable forms of travel.

5.12 These types of centres predominantly cater for the day-to-day service needs of local residents and typically include a limited offer in respect of convenience goods. They are therefore less exposed to the structural changes in the retail sector but will still be ‘at risk’ as consumers increasingly shop around for best value at larger format discount stores, supermarkets as well as online businesses.

5.13 The local neighbourhood centres need to remain as accessible, visible and convenient as possible. This need for good accessibility relates to walking, cycling, public transport as well as car users (trade from passing traffic is likely to be a substantial component of spend). Short term on-street car parking will continue to be important. Improving the visible impact and place / location signage is also important to help register the centres in the mind of local residents. Many neighbourhood centres will benefit from the Perth People and Place initiatives looking to enhance the 20-minute liveable neighbourhood, with improvements to all modes of transport and access to neighbourhood centres.

5.14 The centres that have nearby or adjacent footfall drivers, such as schools, workforce, playgrounds and parks are also more resilient. This reflects the wider place making trends of multi-purpose locations being more successful, even for smaller neighbourhood centres.

5.15 Engaging with local businesses to help them grow their businesses as well as working together for the betterment of the centre will be increasingly important going forward.

6. Catchment Area and Market Share Analysis

6.1 This section describes the catchment area defined for the purpose of this Study and the shopping patterns (or market shares) indicated by the household telephone survey conducted by NEMS Market Research in August/September 2022. As part of this analysis we highlight the degree of expenditure leakage from Perth and Kinross and in turn, where there is potential scope for the clawback of such expenditure leakage.

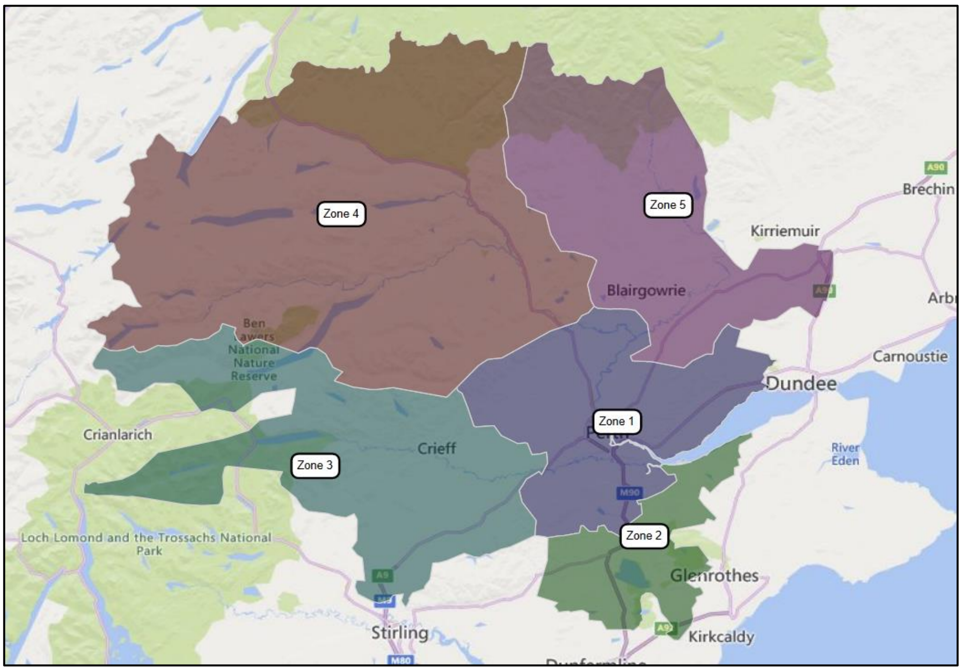
6.2 We refer to the tables included at Appendix C which relate to our retail capacity assessment for Perth and Kinross (as set out and described in sections 7 and 8 of this report).

Catchment Area

6.3 For this Study, we have adopted the same catchment area as the 2016 Study. This catchment area comprising 5 zones has been agreed with PKC and is shown in Figure 6.1 below. A larger map is included at Appendix D.

6.4 The catchment area zones are based on postcode geography[6] and extend beyond the administrative boundary of PKC.

Figure 6.1 – Map of the Perth and Kinross catchment area



Zone 1 – Perth
Zone 2 – Kinross
Zone 3 – Strathearn Area
Zone 4 – Highland Area
Zone 5 – Strathmore and the Glens

6.5 The catchment area sets the sampling framework for the new household telephone survey, which provides a baseline picture of the market share and turnover of existing retail floorspace in the Perth and Kinross area. The survey research further presents information on customer's views and usage of the city and town centres, as identified in section 4 earlier, as well as their leisure-trip habits and

[66] Refer to Table 1 at Appendix C for details of the relevant postcode sectors.

preferences which section 9 of this report considers for the purpose of assessing commercial leisure needs.

Market Share Analysis

6.6 Our market share analysis is focused on existing retail (convenience and comparison goods) floorspace in the shopping destinations shown in Figure 6.2 below.

Figure 6.2 – Shopping destinations modelled

Perth City Centre	
Kinross Town Centre	
Auchterarder Town Centre	*Strathearn Area*
Crieff Town Centre	
Alyth Town Centre	*Strathmore and the Glens*
Blairgowrie Town Centre	
Coupar Angus Town Centre	
Dunkeld & Birnam Town Centre	*Highland Area*
Aberfeldy Town Centre	
Pitlochry Town Centre	
Non-central stores in the Perth and Kinross area (as a group)	

6.7 As discussed further in section 7 of this report, the market shares indicated by a household telephone survey are not without their limitations but are the best available data to use as a proxy for modelling retail expenditure flows from residential areas to shopping destinations. This data can be used in conjunction with company average (or 'benchmark') sales densities to indicate whether a destination is under or over trading. Accordingly, under the relevant section below, we set out the estimated convenience goods sales performance of the shopping destinations modelled based on the survey-indicated market shares and the 'benchmark' sales. This has not been possible for comparison goods, because the shopping destinations (except for Non-central stores in the Perth and Kinross area) have not been modelled using 'benchmark' comparison goods sales due to the lack of published sales information. Notwithstanding, we have provided a high-level assessment of Perth City Centre's comparison goods sales performance.

Convenience Goods Market Shares

6.8 The survey-derived market share (%) analysis for convenience goods shopping in Perth City Centre is set out in Table 6 – and in the equivalent tables for each of the nine town centres and Non-central stores in the Perth and Kinross area – as included at Appendix C.

6.9 Each of these tables include 'main food' and 'top-up food' shopping market shares across the 5 catchment area zones, which are then merged into a weighted average (i.e. 70% for main food and 30% for top-up food) reflecting the estimated proportion of expenditure accounted for by each type of convenience goods shopping. The weighted average is based on our professional judgements and informed by the results of Questions 3 and 6 of the household telephone survey, where respondents indicated approximately how much their household spends on main food and top-up food shopping in a week.

6.10 We calculate that the weekly weighted average expenditure is about £87 for main food shopping and about £17 for top-up food shopping, which suggests a weighting closer to 80:20. A keener weighting for main food shopping is further supported by the fact that large parts of the catchment area are predominantly rural, where consumers are more likely to do a 'main food' shop as opposed to little and often. Habits are likely to differ in the more urbanised areas. However, it is not uncommon for survey respondents (and consumers generally) to under-estimate the amount their household spends on 'incidental' top-up food shopping and on balance, we assess that a weighing of 70:30 is realistic.

6.11 The weighted average convenience goods market shares are set out in Figure 6.3 below on a zone-by-zone basis.

Figure 6.3 – Total convenience goods market shares by zone

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Table no. (Appendix C)
	Perth City Centre	5%	-	2%	-	-	6
	Kinross Town Centre	-	2%	-	-	-	14
Strathearn Area	Auchterarder Town Centre	-	-	9%	-	-	22
	Crieff Town Centre	-	-	7%	-	-	30
Strathmore and the Glens	Alyth Town Centre	-	-	-	-	2%	38
	Blairgowrie Town Centre	1%	-	-	-	16%	46
	Coupar Angus	-	-	-	-	-	54
Highland Area	Dunkeld & Birnam Town Centre	-	-	-	5%	-	62
	Aberfeldy Town Centre	-	-	-	22%	-	70
	Pitlochry Town Centre	-	-	-	29%	-	78
	Non-central stores in the area	79%	38%	33%	37%	21%	86
	Elsewhere	15%	60%	49%	7%	61%	

Notes: The catchment area zone in which a centre lies (i.e. its 'home' zone) is highlighted orange.

6.12 From these 'baseline' shopping patterns, the key findings are:

i. The convenience goods shopping patterns are unsurprisingly localised, with the city and town centres attracting very limited (if any) market shares from outside their respective 'home' zones.

ii. Given that main foodstore provision in Perth is largely focused outside the city centre, Perth City Centre secures only a 5% market share from zone 1. Its convenience goods shops and stores include Sainsbury's Local, Tesco Express and M&S Foodhall, which (as shown in Table 6 at Appendix C) principally cater for 'top-up food' shopping needs.

iii. In part reflecting their rural location in the Highland Area, Aberfeldy and Pitlochry Town Centres secure reasonably strong convenience goods market shares (22% and 29% from their shared 'home' zone) despite their modest offers in this respect. However, a high proportion of sales flow from the Highland Area / zone 4 to 'non-central' foodstores in Perth – notably Aldi (Ruthvenfield Road), Asda (Dunkeld Road) and Tesco Extra (Crieff Road).

iv. Blairgowrie Town Centre also attracts a reasonable market share from its 'home' zone, mainly due to the large Tesco superstore on Welton Road, although the centre is now faced with competition from the out-of-centre Lidl store on Perth Road (which opened in March 2022).

v. Kinross Town Centre has a very 'localised' convenience goods shopping offer (including the Greens of Kinross grocery store, a butcher and a fishmonger) and this is reflected in the market shares. The out-of-centre Sainsbury's store on Station Road is especially well used by residents in the Kinross sub-area / zone 2.

vi. Non-central stores in the Perth and Kinross area dominate convenience goods market shares across the catchment area. Existing provision outside Perth City Centre is particularly dominant while the towns of Blairgowrie and Kinross (as mentioned previously), and Crieff, are also served by 'non-central' main foodstores. These are identified in Figure 6.4 below.

vii. Notable convenience goods expenditure is 'leaked' elsewhere (i.e. to shops and stores outside the Perth and Kinross area), particularly from Strathmore and the Glens / zone 5 (61%) and the Kinross sub-area / zone 2 (60%). This is discussed further later in the section.

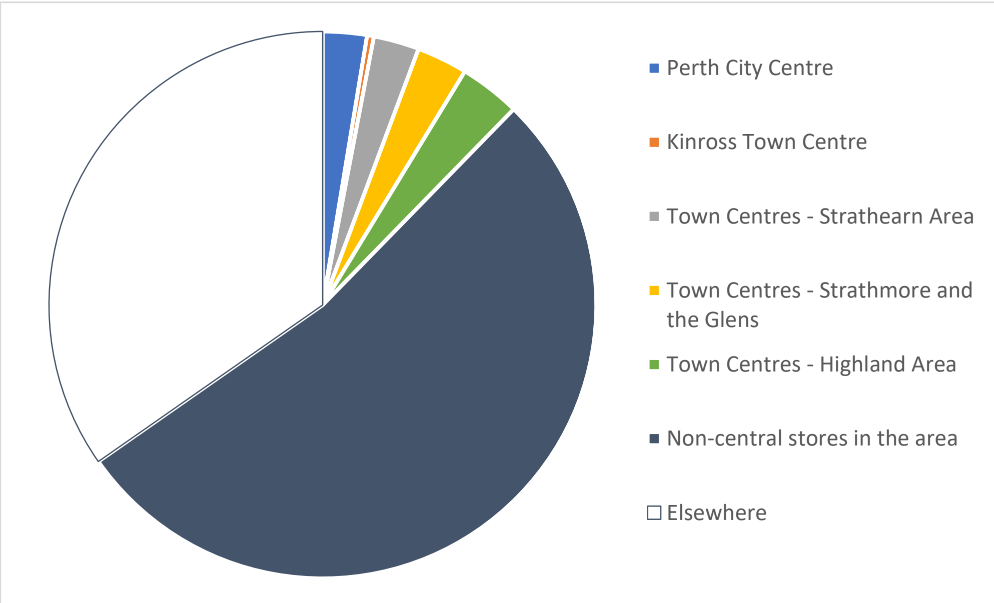
Figure 6.4 – List of 'non-central' main foodstores in the Perth and Kinross area

Perth	**Blairgowrie**	**Kinross**	**Crieff**
Aldi (Glasgow Road) Aldi (Inveralmond Retail Park, Ruthvenfield Road) Asda (Dunkeld Road) Iceland: The Food Warehouse (St Catherines Retail Park) Lidl (Riggs Road) M&S Foodhall (Inveralmond Retail Park) Morrisons (Caledonian Road) Tesco Extra (Crieff Road) Tesco (Edinburgh Road)	Lidl (Perth Road)	Sainsbury's (Station Road)	Aldi (Broich Road)

Source: Table 91 at Appendix C.

6.13 Figure 6.5 below presents the overall catchment area market share analysis for convenience goods shops and stores. It shows that Non-central stores in the Perth and Kinross area – notably the main foodstores listed in Figure 6.4 previously – secure over half (53%) of convenience goods sales within the catchment area. A high proportion of convenience goods expenditure (about 35%) is spent elsewhere, suggesting substantial 'leakage' to other existing centres and stores outside the Perth and Kinross area (as we discuss further below). The overall market shares retained by Perth City Centre and the other sub-areas are relatively limited.

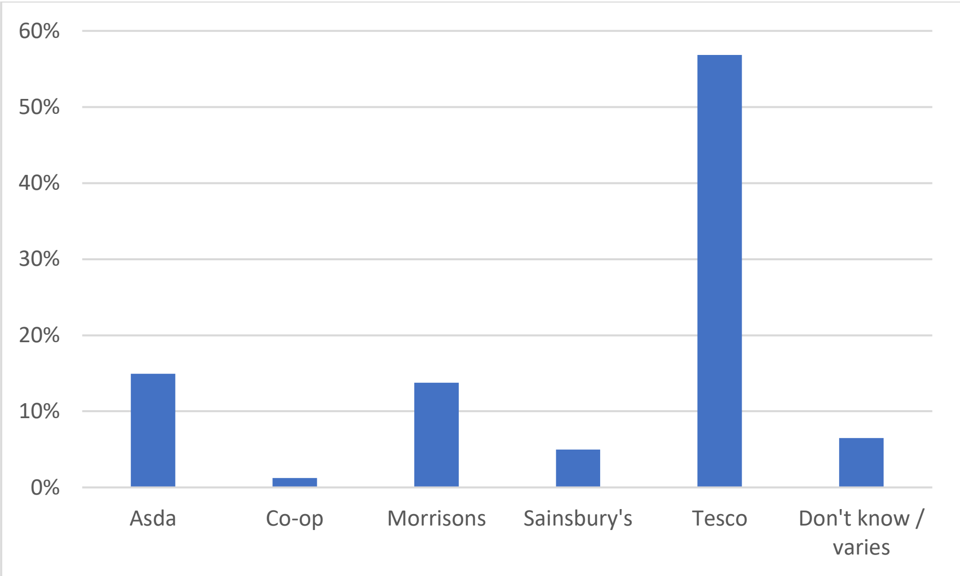
Figure 6.5 – Overall convenience goods market shares in the catchment area



Source: Tables 13, 21, 29, 37, 45, 53, 61, 69, 77, 85 and 94 at Appendix C.

6.14 The preceding analysis accounts for the role of online shopping and other special forms of trading on shopping patterns and expenditure flows across the catchment area. More information on this is provided in section 7 below. When respondents to the household telephone survey were asked, from which retailer they normally purchase their main food internet / home delivery shopping, more than 90% cited the four main retailers shown in Figure 6.6 below. Although internet-based convenience goods shopping has been a growing trend in recent years, due not least to changing consumer habits, the Retail Expenditure Guide 2021/22 published by Precisely reports that around 90% of all online orders at Asda, Morrisons, Sainsbury's and Tesco[7] are fulfilled in-store.

Figure 6.6 – Internet retailer for main food shopping / home delivery



Source: Question 02 of household telephone survey (Appendix E).

6.15 Each of the main retailers shown in Figure 6.6 are represented in the Perth and Kinross area: Tesco in Perth (multiple locations) and Blairgowrie; Asda and Morrisons in Perth; and Sainsbury's in Kinross (in addition to the Sainsbury's Local formats in Perth City Centre and Blairgowrie Town Centre). Co-op is also very well represented across the area, comprising the main convenience store for many of the smaller town centres, although its home delivery service is not as established as the likes of Tesco and Asda.

Estimated convenience goods sales performance (all shopping destinations modelled)

6.16 Figure 6.7 below compares the survey-indicated sales from existing convenience goods floorspace with the 'benchmark' sales in each of the shopping destinations modelled, to estimate the degree of under or over trading in 2022.

[7] Previously known as the 'Big Four' until Aldi overtook Morrisons to become the UK's fourth-largest grocery retailer in September 2022.

Figure 6.7 – Estimated convenience goods sales performance in 2022

	Survey-indicated sales £million	**Est. benchmark sales** £million	**Est. over/under trading** £million	Table number (Appendix C)
Perth City Centre	£13.3m	£30.1m	-£16.8m	13
Kinross Town Centre	£1.9m	£4.0m	-£2.1m	21
Auchterarder Town Centre	£7.9m	£7.6m	+£0.3m	29
Crieff Town Centre	£6.1m	£16.4m	-£10.3m	37
Alyth Town Centre	£1.4m	£4.6m	-£3.2m	45
Blairgowrie Town Centre	£13.9m	£34.7m	-£20.8m	53
Coupar Angus Town Centre	n/a	n/a	n/a	61
Dunkeld & Birnam Town Centre	£1.4m	£2.9m	-£1.5m	69
Aberfeldy Town Centre	£7.3m	£3.4m	+£3.9m	77
Pitlochry Town Centre	£10.7m	£10.1m	+£0.6m	85
Non-central stores in the Perth and Kinross area	£266.4m	£260.6m	+£5.8m	94

6.17 The analysis set out in Figure 6.7 suggests that the larger city and town centres in the Perth and Kinross area (namely Perth City Centre, Crieff Town Centre and Blairgowrie Town Centre) are substantially under-trading relative to 'benchmark' convenience goods sales. There is no clear explanation for this, although it is possible (and perhaps likely) that convenience goods shopping in these centres has been under-represented in the results of the household telephone survey. In the case of Blairgowrie Town Centre, for example, the survey-indicated sales (£13.9m) would suggest that the Tesco superstore is under-trading relative to benchmark levels (estimated at £19.2m) and that is before accounting for the sales secured by the centre's other convenience goods shops and stores.

6.18 The trading picture among the other town centres is more mixed, with the degree of under or over trading less pronounced. Meanwhile, the survey-indicated sales would suggest that the Non-central stores in the Perth and Kinross area (as a group) are trading almost £6m above estimated benchmark levels which, on the face of it, seems realistic considering the strong 'non-central' main foodstore line-up relative to city and town centre provision.

Comparison Goods Market Shares

6.19 The survey-derived market share (%) analysis for the various categories of comparison goods[8] shopping in Perth City Centre is set out in Table 7 – and in the equivalent tables for each of the nine town centres and Non-central stores in the Perth and Kinross area – as included at Appendix C.

6.20 Figure 6.8 below sets out the weighted average market shares on a zone-by-zone basis.

[8] The household telephone survey comprised questions on the main groups of comparison goods expenditure, including clothing and footwear; furniture and floor coverings; household textiles; household appliances; audio-visual equipment; hardware, DIY and garden products; chemist, medical and beauty goods; and all other comparison goods (e.g. books, jewellery, watches).

Figure 6.8 – Total comparison goods market shares by zone

		Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	Table no. (Appendix C)
	Perth City Centre	47%	23%	23%	41%	10%	7
	Kinross Town Centre	-	4%	-	-	-	15
Strathearn Area	Auchterarder Town Centre	-	-	5%	-	-	23
	Crieff Town Centre	-	-	5%	-	-	31
Strathmore and the Glens	Alyth Town Centre	-	-	-	-	2%	39
	Blairgowrie Town Centre	1%	-	-	1%	16%	47
	Coupar Angus	-	-	-	-	3%	55
Highland Area	Dunkeld & Birnam Town Centre	-	-	-	3%	-	63
	Aberfeldy Town Centre	-	-	1%	11%	-	71
	Pitlochry Town Centre	-	-	-	12%	-	79
	Non-central stores in the area	33%	12%	18%	26%	6%	87
	Elsewhere	19%	61%	48%	6%	63%	

Notes: The catchment area zone in which a centre lies (i.e. its 'home' zone) is highlighted orange.

6.21 From these 'baseline' shopping patterns, the key findings are:

i. Perth City Centre is the principal comparison goods shopping destination in the catchment area, retaining a 47% market share from its 'home' zone as well as substantial shares from the surrounding zones (including 41% of total comparison goods expenditure available in zone 4 i.e. the Highland Area and 23% from both the Kinross and Strathearn Area zones).

ii. Blairgowrie Town Centre attracts a 16% market share from its 'home' zone, reflecting the scale of its comparison goods shopping offer including within the large Tesco superstore on Welton Road.

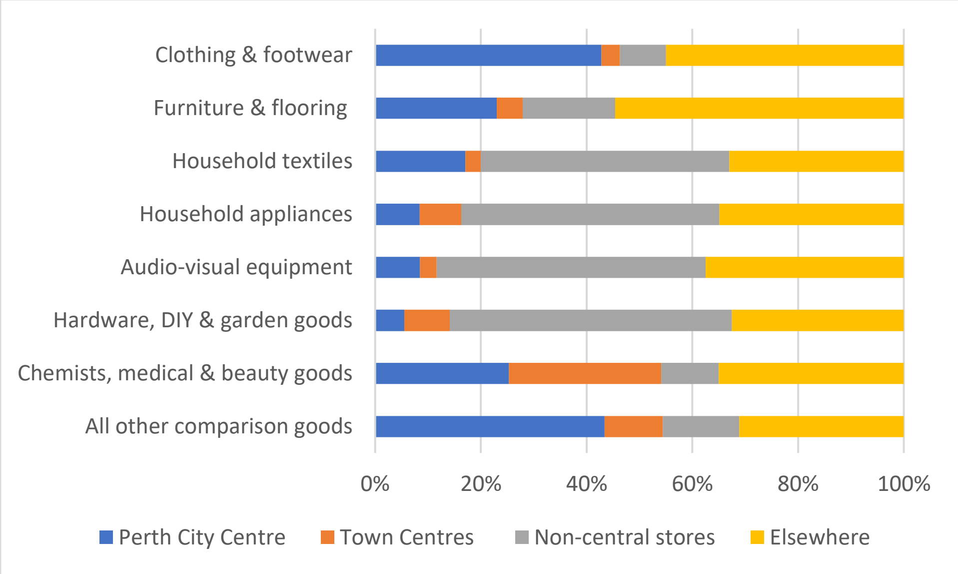
iii. Except for Aberfeldy and Pitlochry Town Centres in the Highland Area, each of the other town centres retain a comparison goods market share from their respective 'home' zones of 5% or less, demonstrating their relatively limited offers.

iv. Non-central stores in the Perth and Kinross area, which we have modelled as a group, secure market shares from across the catchment area and particularly from the 'Perth' zone (33%), the Highland Area (26%) and the Strathearn Area (18%). St Catherines Retail Park in Perth is the dominant 'non-central' comparison goods shopping destination (includes B&M, Carpetright, Currys, Dunelm, Home Bargains, The Range, TK Maxx and Wickes).

v. Notable comparison goods expenditure is 'leaked' elsewhere (i.e. to shops and stores outside the Perth and Kinross area), particularly from Strathmore and the Glens / zone 5 (63%) and the Kinross sub-area / zone 2 (61%). This is discussed further later in the section.

6.22 An overview of the market shares by type of comparison goods is presented in Figure 6.9 below. For the purpose of this analysis, we have focused on Perth City Centre (as the area's principal comparison goods shopping destination) and have grouped together the nine town centres given their relatively limited offers and thus market shares. We have further identified the market shares for Non-central stores in the Perth and Kinross area (as a group); in addition to the market shares attracted elsewhere (including the competing shopping destinations outside the Perth and Kinross area).

Figure 6.9 – Catchment area market shares by type of comparison goods



Source: Tables 9, 17, 25, 33, 41, 49, 57, 65, 73, 81 and 89 at Appendix C.

6.23 The analysis shows that:

i. Perth City Centre performs particularly well in terms of attracting catchment area expenditure on clothing and footwear (43%) as well as personal and luxury goods (i.e. the 'all other comparison goods' sub-category) (also 43%). These findings reflect the strength and character of the City Centre's retail offer. The centre also attracts reasonably high market shares on medical and beauty goods (25%); furniture and flooring (23%); and household textiles (17%).

ii. The town centres' reasonably high market shares of expenditure on medical and beauty goods (29%) can largely be attributed to the localised nature of shopping trips for such goods, often forming part of a 'main food' shop.

iii. Non-central stores in the Perth and Kinross area dominate the catchment area market shares on larger types of comparison goods including hardware, DIY and garden goods (53%); audio-visual equipment (51%); household appliances (49%); and household textiles (47%). In respect of clothing and footwear, and personal and luxury goods, which are both important comparison goods sub-categories for Perth City Centre, the 'non-central' shopping destinations secure relatively modest shares at 9% and 14% respectively.

iv. The main competing destinations outside the Perth and Kinross area – which form part of the 'Elsewhere' category in Figure 6.9 above – for fashion-orientated retail sales are Dundee City Centre (securing a 12% catchment area market share on clothing and footwear); Stirling City Centre (7%); and Edinburgh City Centre (4%).

Estimated comparison goods sales performance (Perth City Centre only)

6.24 As mentioned previously, we have assessed in high-level terms the trading performance of existing comparison goods floorspace in Perth City Centre – the principal comparison goods shopping destination in the Perth and Kinross area.

6.25 The market shares from the household telephone survey indicate that Perth City Centre is achieving comparison goods sales of some £242.9m in 2022. This represents a catchment area market share of 33% and, based on the total amount of existing comparison goods floorspace in the City Centre (as derived from Experian Goad), generates an average sales density of about £7,500 per sqm net.

6.26 There is an approximate correlation between the size of a centre and its average sales density, with larger centres generally having higher sales densities than smaller centres (and hence higher shop rental values). In our experience and considering the content and quality of the retail offer in Perth City Centre, a comparison goods sales density of about £7,500 per sqm net seems high (and potentially unrealistically high on the basis we would estimate about £6,500 per sqm net) and suggests that the City Centre is currently trading well as comparison goods shopping destination.

6.27 That said, household telephone surveys often tend to over-emphasise comparison goods shopping in larger centres and stores; and under-represent it in small centres. The main reason is because in a small sample survey, the probability of interviewing the small number of people who use small centres is much less than the probability of interviewing the much larger number of people who use larger centres. This may explain the 'potentially unrealistically high' survey-indicated comparison goods sales density for Perth City Centre.

Expenditure Leakage (and Clawback) Analysis

6.28 On the face of it, the market share analysis set out above identifies substantial 'leakage' of catchment area expenditure on both convenience and comparison goods to existing centres and stores outside the Perth and Kinross area. This is particularly the case for Strathmore and the Glens, Kinross, and (to a lesser extent) the Strathearn Area.

6.29 However, it is important to note that there is no pre-determined or definitive level of expenditure retention which is good or bad. acceptable or unacceptable, etc. The expenditure market shares retained within (and leaked from) a catchment largely depends on the size of the catchment area and its relationship with, and connectivity to, surrounding centres and stores.

6.30 In the case of the catchment area defined for the purpose of this Study (and consistent with the 2016 Study), the 5 catchment area zones are based on postcode geography and therefore extend beyond the administrative boundary of PKC. This is also entirely appropriate, on the basis shoppers and shopping patterns do not recognise administrative boundaries. Rather, shopping habits are influenced by choice and locational/accessibility factors. The analysis provided below should be considered in this context.

6.31 Figure 6.10 below sets out the convenience and comparison goods expenditure market shares 'leaked' to shops and stores outside the Perth and Kinross area on a zone-by-zone basis.

Figure 6.10 – Total catchment area expenditure leakage by zone

'Elsewhere' market shares	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Convenience goods	15%	60%	49%	7%	61%
Comparison goods	19%	61%	48%	6%	63%

Source: Figures 6.3 and 6.8 above.

6.32 We would make the following observations:

i. Zone 1 (Perth) – as well as being the Perth 'home' zone it extends east towards Dundee which, together with Edinburgh, is the main destination of expenditure leakage. Whilst the higher order comparison goods shopping (and all-round) offer is likely to be a driving factor, particularly in the case of Edinburgh, it is relevant that Dundee will be closer and more convenient than Perth City Centre for some zone 1 residents.

ii. Zone 2 (Kinross) – this zone extends beyond the administrative boundary of PKC and towards Cowdenbeath and Glenrothes, where Aldi (Cowdenbeath and Glenrothes) and Asda (Glenrothes) are the most popular main food shopping destinations outside the Perth and Kinross area among zone 2 residents (most likely those living or working close to the foodstores mentioned). The main comparison goods shopping destinations include Dunfermline, Edinburgh and Glenrothes.

iii. Zone 3 (Strathearn Area) – zone 3 overlaps Dunblane and extends south towards Stirling. It is therefore unsurprising that a notable proportion of convenience goods expenditure available within this zone is secured by main foodstore provision in Dunblane (notably the Tesco

Superstore) and the discount foodstores (i.e. Aldi and Lidl) in Stirling. The cities of Stirling and Glasgow are the most popular comparison goods shopping destinations outside the Perth and Kinross area.

iv. Zone 4 (Highland Area) – there is very limited expenditure leakage from the Highland Area to shopping destinations outside the Perth and Kinross area (7% and 6% of convenience and comparison goods expenditure respectively). However, as our earlier analysis has shown, residents of the Highland Area are somewhat dependent on shops and stores in Perth to meet their comparison goods shopping needs (and to a lesser extent on foodstores outside Perth City Centre for their main food shopping needs).

v. Zone 5 (Strathmore and the Glens) – zone 5 overlaps Forfar, which is well represented by main foodstores including Aldi, Asda and Tesco. A notable convenience goods expenditure market share is therefore secured by Forfar, while Dundee City Centre (just to the south) is a popular destination among zone 5 residents for comparison goods shopping. Indeed, for many such residents, Dundee City Centre will be closer and more convenient than Perth City Centre.

6.33 Thus, in terms of the potential to clawback the expenditure currently being 'lost' to competing centres and stores outside the Perth and Kinross area, it should be acknowledged that for many catchment area residents, those centres and stores will remain the more attractive destinations by virtue of their proximity and accessibility; and it is likely to be the shopping habits of those residents which are the most difficult to change irrespective of any improvements to the city/town centres.

6.34 The breadth and quality of choice, and making centres in Perth and Kinross as attractive and multi-purpose as possible, is also clearly relevant and will influence where and how often people visit for shopping and services. To that end, the most appropriate strategy for clawing-back expenditure leakage will involve addressing the issues and qualitative needs for improvement identified for the area's centres in section 4 of this report. The delivery of those (or as many as possible) suggested improvements will help to secure their future vitality and viability and make them more attractive to shoppers and other users, albeit recognising that the scale and nature of the smaller centres will remain a limitation in terms of their ability to retain trips and expenditure.

7. Retail Capacity: Approach and Baseline Evidence

7.1 In this section, we outline our approach to retail capacity forecasting. We then set out the baseline assumptions and forecasts underpinning the assessment of new retail (convenience and comparison goods) floorspace capacity in the Perth and Kinross area over the plan period.

7.2 Our capacity forecasts distinguish between convenience goods and comparison goods, defined as follows:

- Convenience goods: *Food, alcoholic drink, tobacco products, newspapers and periodicals, non-durable household goods.*
- Comparison goods: *Clothing and footwear; household textiles and soft furnishings; Furniture and floor coverings; household appliances; audio visual equipment; hardware, DIY goods, decorating supplies; chemist and medical goods, cosmetics and beauty products; books, jewellery, watches, china, glassware and kitchen utensils, recreational, personal and luxury goods.*

Approach

7.3 Our assessment uses an Excel-based retail capacity model, applying the most up-to-date baseline evidence available including a new household telephone survey conducted by NEMS in August/September 2022.

7.4 Consistent with good retail planning practice, we forecast the expenditure-based capacity for new retail floorspace as follows:

- calculate the total amount of convenience and comparison goods expenditure available within each of the 5 zones comprising the catchment area, at the base and forecasting years (as defined below);
- allocate the available expenditure to the area's shopping destinations based on the results of the 2022 household telephone survey to estimate current sales and forecast future sales in each shopping destination;
- identify any committed developments (i.e. retail floorspace with planning permission and/or under construction) and assess their likely turnover contribution to future sales; and
- compare the estimated sales in the area's shopping destinations with existing floorspace, so as to assess the current trading performance of each shopping destination and the capacity to support additional convenience and/or comparison goods floorspace (after allowing for any committed developments).

7.5 We set out below further details relating to the scope and format of the quantitative retail capacity assessment.

Catchment area

7.6 As set out in section 6 above, we have adopted the same catchment area (and zones) as the 2016 Study. The catchment area zones are based on postcode geography[9] and extend beyond the administrative boundary of PKC to reflect shopping patterns and expenditure flows.

7.7 A map of the catchment area showing the 5 zones is included at Appendix D.

Shopping destinations and scenarios modelled

7.8 The shopping destinations modelled are shown in Figure 7.1 below.

[99] Refer to Table 1 at Appendix C for details of the relevant postcode sectors.

Figure 7.1 – Shopping destinations modelled

Perth City Centre	
Kinross Town Centre	
Auchterarder Town Centre	*Strathearn Area*
Crieff Town Centre	
Alyth Town Centre	*Strathmore and the Glens*
Blairgowrie Town Centre	
Coupar Angus Town Centre	
Dunkeld & Birnam Town Centre	*Highland Area*
Aberfeldy Town Centre	
Pitlochry Town Centre	
Non-central stores in the Perth and Kinross area (as a group)	

7.9 We assess the 'baseline' scenario for new retail floorspace in the Perth and Kinross area, in which we assume that the 2022 pattern of market shares of convenience and comparison goods expenditure in each of the area's shopping destinations – as indicated by the new household telephone survey – remains unchanged throughout the forecasting period. The implicit assumption in this scenario is that any new retail floorspace (or 'lost' retail floorspace e.g. through redevelopment and/or change of use to non-retail) would not change the market shares of expenditure attracted from the catchment area. This 'constant market share' approach is widely used and accepted for strategic retail capacity forecasting.

7.10 Whilst we have sought to prepare capacity forecasts for both convenience and comparison goods floorspace in each of the city and town centres, plus the 'non-central' shopping destinations, we have been unable to prepare forecasts for convenience goods floorspace in Coupar Angus Town Centre in the absence of survey-indicated market shares.

Base and forecasting years

7.11 We have used 2022 as the base year for our retail capacity forecasts. The model therefore provides estimates of current sales in each of the shopping destinations as at 2022.

7.12 As agreed with the Council, we have prepared capacity forecasts at 2027, 2032 and 2037 (so as to cover the forthcoming plan period).

Limitations of retail capacity forecasting

7.13 It is important to note that the retail capacity forecasts serve only as a guide for future planning policies, development frameworks and/or decisions on planning applications. They are not prescriptive and the further ahead the forecasting year, the less certain the forecasts. Accordingly, PKC should be aware that capacity forecasts beyond five years should be treated with a degree of caution, as they are based on various assumptions and forecasts that can and will change. Forecasting accuracy, even over the next five years, is also uncertain due to changing macro-economic conditions.

7.14 We would also note that some of the area's town centres are relatively small and rural; and are not main destinations for shopping and thus do not feature notably in the results of the household telephone survey. As such, whilst we have sought to prepare retail capacity forecasts for the smaller centres, the inevitable lack of 'full' market share data is a limitation.

Format of the retail capacity tables

7.15 In the remainder of this section, all references to *Tables* are those comprising our up-to-date assessment of new retail floorspace capacity set out at Appendix C:

- Tables 1 to 5 show the population and expenditure forecasts for the catchment area.
- Tables 6 to 13 are the tables for Perth City Centre. Tables 6 and 7 indicate the pattern of market shares of expenditure on each category of convenience and comparison goods respectively attracted from the catchment area, as indicated by the 2022 household telephone survey. Table 8 provides an overview of the pattern of market shares for Perth City Centre. Table 9 is the product of Tables 5 and 7, indicating the amounts of expenditure on each comparison goods sub-category attracted. Table 10 sets out forecast retail sales for both convenience and comparison goods, on a zone-by-zone basis and overall. Table 11 accounts for the sales capacity of existing main foodstores and other convenience goods shops in the City Centre, and Table 12 sets out any committed retail developments and their expected sales levels (for both convenience and comparison goods). Table 13 brings together the expenditure attracted, existing floorspace and commitments to arrive at the retail capacity forecasts for Perth City Centre. It also shows (in the bottom row) the overall market shares of catchment area expenditure on convenience and comparison goods attracted by the City Centre.
- Thereafter, we have modelled Kinross Town Centre (Tables 14 to 21); Auchterarder Town Centre (Tables 22 to 29); Crieff Town Centre (Tables 30 to 37); Alyth Town Centre (Tables 38 to 45); Blairgowrie Town Centre (Tables 46 to 53); Coupar Angus Town Centre (Tables 54 to 61); Dunkeld & Birnam Town Centre (Tables 62 to 69); Aberfeldy Town Centre (Tables 70 to 77); and Pitlochry Town Centre (Tables 78 to 85). These tables follow the same arrangement as the tables for Perth City Centre.
- Tables 86 to 94 are the tables for Non-central stores in the Perth and Kinross area. These tables follow the same arrangement as the tables for Perth City Centre; however, an additional table is included (Table 92) indicating 'benchmark' comparison goods sales in the existing retail warehouses and foodstores.

Baseline Evidence

7.16 The principal data inputs and assumptions underpinning the new retail capacity forecasts are set out below.

Household telephone survey of shopping patterns

7.17 As mentioned in section 6, we designed and commissioned a new household telephone survey of shopping patterns in the catchment area – the results of which are included at Appendix E. It covered the area shown on the map at Appendix D which was divided into the 5 catchment zones identified, consistent with the 2016 Study.

7.18 A total of 1,013 telephone interviews were undertaken by NEMS in August/September 2022. Figure 7.2 below shows that these interviews were distributed across the 5 catchment zones broadly in proportion to the population of each zone.

Figure 7.2 – The distribution of telephone interviews

	Number of interviews	**Population estimates (2022)**
Zone 1	326	90,805
Zone 2	175	39,913
Zone 3	175	34,086
Zone 4	150	12,451
Zone 5	187	28,557
Total	**1,013**	**205,812**

Source:
Population estimates indicated in Table 1, Appendix C.

7.19 The survey asked questions about households' shopping habits for main food and top-up food (i.e. convenience goods) shopping. The survey also asked questions about households' shopping habits for 8 different sub-categories of comparison goods shopping (these sub-categories are closely matched with the widely recognised retail expenditure categories to ensure compatibility with the capacity model). We have combined the results of Questions 7 to 14 of the household telephone survey to provide weighted average market shares of all comparison goods expenditure attracted to each of the shopping destinations modelled, using weights according to the amount of expenditure on each of these 8 sub-categories of comparison goods shopping. These are set out in Table 4 (bottom row) of the capacity model.

7.20 The household telephone survey therefore provides a detailed picture of where households in each of the 5 catchment zones do (specifically) 'most of' their shopping for convenience goods and the 8 different categories of comparison goods. This is common practice for a survey of this nature, since it is not practical within the limitations of the sample to quantify how much households spend on convenience goods and the various categories of comparison goods, and where and how often. Shopping patterns are too dynamic and unpredictable. Accordingly, the results of the household telephone survey do not directly indicate actual expenditure flows but are the best available data to use as a proxy for modelling retail expenditure flows from residential areas to shopping destinations.

7.21 It should be recognised, as noted previously, that such surveys (including the telephone survey undertaken as part of this Study) often tend to over-emphasise comparison goods shopping in larger centres and stores; and under-represent it in small centres. The main reason is because in a small sample survey, the probability of interviewing the small number of people who use small centres is much less than the probability of interviewing the much larger number of people who use larger centres. It is also sometimes the case, in our experience, that convenience goods shopping is under-represented in those larger centres which mainly function as comparison goods shopping destinations.

Catchment population

7.22 The starting point for the population forecasts is the 'GeoInsight' report, dated August 2022, commissioned from Precisely (formerly Pitney Bowes) on the current and projected future population of each catchment zone. The result is that, for the catchment area as a whole, the population is expected to increase from 205,812 in 2022 to 213,648 by 2037 (representing an increase of about 4%).

Per capita expenditure

7.23 The report commissioned from Precisely sets out estimated average per capita expenditure on convenience and comparison goods[10] in each catchment zone. The estimates and forecasts included within that report account for differences in average per capita expenditure on comparison and convenience goods from zone to zone, and are shown in the top half of Table 2 at Appendix C.

7.24 The forecast 'growth' in per capita expenditure in Table 2 is specific to the catchment area and therefore more reliable than national forecasts. Notwithstanding, the local forecasts broadly reflect the UK-wide trend of a short term reduction in per capita expenditure on convenience goods, before limited increases in the medium to long term; and slower comparison goods expenditure growth (relative to historic levels) which, for retailers, is exacerbated by the increasing volume of sales directed to special forms of trading and, in particular, online.

Special Forms of Trading (SFT)

7.25 We have made deductions from the per capita expenditure figures supplied by Precisely to allow for expenditure via SFT. This includes online shopping, mail order and expenditure at temporary market stalls; and is therefore expenditure not made in shops and stores. Table 2 shows the growing deductions we have made.

7.26 We have applied an SFT deduction of 7% for convenience goods expenditure in 2022, increasing to 8.5% by 2037. Our SFT deductions for comparison goods expenditure are much greater; from 22.5% in 2022 to 29% by the end of the forecasting period.

[10] Including expenditure on Special Forms of Trading.

7.27 These deductions are based on our professional judgements[11] at this moment in time. Whilst the total volume of online retail sales is greater than the percentages assumed within the model, it is necessary to recognise that, with the growth of multi-channel retailing, physical stores can function as showrooms and a source of stock for online-based sales. Therefore, not all online retail sales are 'lost' from the turnover of physical stores and our SFT deductions seek to account for this.

Total available expenditure in the catchment area

7.28 The combined effect of the forecast growth in population and per capita expenditure (after deducting expenditure on SFT) is that we expect total catchment area expenditure on convenience goods to increase by about £10.7m (approximately 2%) over the period 2022 to 2037; as set out in Table 3 of the model.

7.29 For comparison goods, we expect total catchment area expenditure to increase by about £148m (approximately 21%) over the period 2022 to 2037. This compares with growth in the total catchment area population of around 4% over the period. Thus, only a relatively small proportion of the growth in catchment area expenditure on comparison goods is accounted for by forecast growth in population. This means that the comparison goods floorspace capacity forecasts are particularly insensitive to population growth assumptions, principally because:

- Any population growth is likely to be only a small proportion of total catchment area population (and its available expenditure); and
- The expenditure arising from any population growth is likely to be attracted by a number of shopping destinations (as shopping patterns vary greatly), therefore having only a small effect on capacity forecasts in any individual centre.

7.30 The comparison goods floorspace capacity forecasts are much more sensitive to the assumptions about growth in per capita expenditure, however, especially in the later part of the forecasting period. This underlines the need to review the capacity forecasts at regular intervals over that period.

Visitor expenditure

7.31 For some of the shopping destinations modelled, allowances have been made for convenience and comparison goods expenditure by visitors who live outside the catchment area (or 'inflow' expenditure). These allowances (set out in Figure 7.3 below) are based on our knowledge of the city and town centres, including their propensity to attract tourists, in addition to the results of the household telephone survey and the business-to-business interview surveys.

7.32 Although retail capacity forecasts are relatively insensitive to such 'inflow' expenditure assumptions, it is considered important to recognise that some locations – notably Pitlochry and Dunkeld & Birnam Town Centres – are popular visitor destinations with a retail offer catering particularly well for day-trippers and other tourists.

[11] Supported by information for the UK published by Oxford Economics (derived from Precisely's latest Retail Expenditure Guide 2021/22) and Experian's Retail Planner Briefing Note.

Figure 7.3 – Visitor expenditure allowances

	Visitor expenditure on convenience goods (from 2022 onwards)	**Visitor expenditure on comparison goods** (from 2022 onwards)
Perth City Centre	3%	5%
Kinross Town Centre	3%	-
Auchterarder Town Centre	3%	5%
Crieff Town Centre	3%	3%
Alyth Town Centre	-	-
Blairgowrie Town Centre	3%	3%
Coupar Angus Town Centre	-	-
Dunkeld & Birnam Town Centre	10%	20%
Aberfeldy Town Centre	3%	5%
Pitlochry Town Centre	15%	25%
Non-central stores in the Perth and Kinross area	-	3%

Notes:
Percentages represent the estimated percentage of catchment area residents' spending.

7.33 These visitor expenditure allowances are reflected in Table 13 at Appendix C for Perth City Centre, and in the equivalent tables for the other shopping destinations modelled.

Existing shop floorspace

7.34 The existing shop floorspace in the area's shopping destinations has been sourced from the most recent Experian Goad surveys (insofar as available)[12]. With regards to the smaller centres[13], floorspace data has been derived from ProMap using the information collated during our town centre inspections.

7.35 For the Non-central stores in the Perth and Kinross area, floorspace data has been derived from a range of sources including the 2016 Study and planning applications/permissions information supplied by PKC.

Committed shop floorspace

7.36 We have included in the model any substantial (i.e. 500 sqm gross or more) retail development proposals, with extant planning permission, in the Perth and Kinross area.

7.37 Such commitments are limited to the planning permission (ref. 21/00248/FLL) granted for a replacement out-of-centre Aldi foodstore on Glasgow Road in Perth. Although the permission has not been issued pending a legal revocation in respect of the existing (smaller) foodstore, we have been asked to prepare capacity forecasts on the basis the replacement store is delivered. The net additional convenience goods floorspace, and resulting estimated sales, is accounted for in Table 93.

Growth in sales densities

7.38 We have assumed that both existing and new comparison goods floorspace will increase its sales density by approximately 2% per annum throughout the forecasting period. This allocates a proportion of the forecast growth in expenditure to existing shops and stores, before new floorspace becomes necessary. Our judgements in this respect take into consideration Precisely's Retail Expenditure Guide 2021/22.

7.39 We have made no allowance for increases in sales densities of convenience goods floorspace over the forecasting period.

[12] Experian Goad surveys available for Perth City Centre (last surveyed in May 2022), Kinross (April 2021), Auchterarder (January 2022), Crieff (January 2022), Blairgowrie (December 2021) and Pitlochry (December 2021).
[13] Namely the town centres of Alyth, Coupar Angus, Dunkeld & Birnam and Aberfeldy.

8. Retail Capacity: Forecasts

8.1 In this section, we set out and discuss the implications of our retail capacity forecasts for the Perth and Kinross area.

8.2 We have prepared individual forecasts for both convenience and comparison goods floorspace in Perth City Centre, each of the nine town centres, and Non-central stores in the Perth and Kinross area (as a group)[14] over the period to 2037. We also set out combined forecasts for the Perth and Kinross sub-areas (as shown in Figure 8.1 below) and for the area as a whole.

Figure 8.1 – Shopping destinations modelled

Perth City Centre	
Kinross Town Centre	
Auchterarder Town Centre	*Strathearn Area*
Crieff Town Centre	
Alyth Town Centre	*Strathmore and the Glens*
Blairgowrie Town Centre	
Coupar Angus Town Centre	
Dunkeld & Birnam Town Centre	*Highland Area*
Aberfeldy Town Centre	
Pitlochry Town Centre	
Non-central stores in the Perth and Kinross area (as a group)	

8.3 As outlined in section 7, our forecasts represent the 'baseline' scenario for new retail floorspace, in which we assume that the 2022 pattern of market shares of convenience and comparison goods expenditure (as indicated by the new household telephone survey) remains unchanged throughout the forecasting period to 2037 – notwithstanding the potential impact of any new or replacement retail development and/or any existing shop floorspace 'lost' to alternative uses.

8.4 The capacity forecasts, particularly beyond the next five years, should be treated with a degree of caution as they are based on various assumptions and forecasts that can and will change (due not least to structural changes in the retail sector as well as the cost of living crisis and the looming recession). To illustrate the point, the 2016 Study forecast substantial 'spare' capacity for both convenience and comparison goods floorspace across the Perth and Kinross area by 2026, whereas the overall picture from our up-to-date forecasts is one of over-supply (including in the short term i.e. by 2027).

8.5 We are aware that the 2016 Study provided a low and high estimate of the expenditure-based capacity for new retail floorspace; the 'high' estimate being based on broad assumptions in relation to the potential clawback of expenditure leakage. However, as mentioned, the 2016 Study identified a baseline position of 'spare' capacity and took the view that the Perth and Highland sub-areas (only[15]) had sufficient capacity for the high estimates to be relevant. Those findings contrast with the up-to-date capacity forecasts set out and described below, which point to over-supply, and therefore it is considered that an additional scenario is not necessary for, or additive to, assessing retail needs for the purpose of the LDP. Given expenditure growth projections and the substantial proportion of spending online, even significant upward adjustments to the survey-indicated market shares attracted to the shopping destination modelled would not result in 'positive' retail capacity where substantial over-supply is forecasted.

[14] Although retail capacity forecasts have been prepared for Non-central stores in the Perth and Kinross area, this is for forecasting convenience and does not mean that any capacity forecasted should necessarily be accommodated in the form of 'non-central' development. Rather, the sequential approach should be applied.
[15] See paragraph 9.3.6 (et al) of the 2016 Study.

Convenience Goods Floorspace

8.6 Our forecasts in respect of the need for new convenience goods floorspace in the Perth and Kinross area are summarised in Figure 8.2 below. This shows the capacity for new floorspace (sqm net sales area), with the net available expenditure to support new floorspace shown in brackets/grey under the 'sqm net sales area' figures.

8.7 Before we comment on the capacity forecasts, we would note that the forecasts are on the assumption that, where existing convenience goods floorspace is shown in the model to be trading above or below average benchmark levels (as considered in section 6 of this report), the sales density will fall or rise to that benchmark level from 2027 onwards. In reality, some stores may continue to trade above or below average benchmark levels.

8.8 The forecasts are also on the assumption that potential new convenience goods floorspace would be delivered in the form of a new foodstore(s) trading at a 'generic' average sales density of £11,500 per sqm net. Some operators would trade above this level whilst other foodstores (and convenience goods shops) would trade below. Therefore, the format in which new convenience goods floorspace is provided will affect the amount of such floorspace that can be supported in terms of expenditure-based capacity.

Figure 8.2 – Summary of capacity forecasts: convenience goods (sqm net sales area)

	2027	**2032**	**2037**	Table number (Appendix C)
Perth City Centre	-1,500 (-£17.3m)	-1,450 (-£16.9m)	-1,450 (-£16.6m)	13
Kinross Town Centre	-200 (-£2.2m)	-200 (-£2.1m)	-200 (-£2.1m)	21
Auchterarder Town Centre	0 (-£0.1m)	0 (£0.1m)	50 (£0.4m)	29
Crieff Town Centre	-900 (-£10.5m)	-900 (-£10.3m)	-900 (-£10.1m)	37
Strathearn Area (sub-total)	*-900*	*-900*	*-850*	
Alyth Town Centre	-300 (-£3.2m)	-300 (-£3.2m)	-250 (-£3.2m)	45
Blairgowrie Town Centre	-1,850 (-£21.3m)	-1,800 (-£20.9m)	-1,800 (-£20.5m)	53
Coupar Angus Town Centre	n/a (n/a)	n/a (n/a)	n/a (n/a)	61
Strathmore and the Glens (sub-total)	*-2,150*	*-2,100*	*-2,050*	
Dunkeld & Birnam Town Centre	-150 (-£1.6m)	-150 (-£1.5m)	-150 (-£1.5m)	69
Aberfeldy Town Centre	300 (£3.6m)	350 (£3.8m)	350 (£4.1m)	77
Pitlochry Town Centre	50 (£0.3m)	50 (£0.6m)	100 (£0.9m)	85
Highland Area (sub-total)	*200*	*250*	*300*	
Non-central stores in Perth and Kinross	-550 (-£6.3m)	50 (£0.5m)	700 (£8.2m)	94
Combined forecasts for Perth and Kinross	**-5,100**	**-4,350**	**-3,550**	

Notes:
a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
b) Forecasts rounded to the nearest 50 sqm net.
c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

8.9 Figure 8.2 shows that there will be a substantial theoretical over-supply of convenience goods floorspace in the Perth and Kinross area from 2027 onwards. The amount of 'surplus' floorspace decreases over the forecasting period (from about -5,100 sqm net sales area to about -3,550 sqm net sales area) owing to the effects of population and expenditure growth.

8.10 Perth City Centre is forecast to have a theoretical over-supply of convenience goods floorspace of about -1,500 sqm net sales area from 2027 onwards. An over-supply is also forecasted for Blairgowrie Town Centre (about -1,850 sqm net sales area) and Crieff Town Centre (about -900 sqm net sales area).

8.11 The capacity forecasts for the other town centres broadly represent a level of equilibrium, suggesting limited expenditure-based capacity to support additional convenience goods floorspace.

8.12 Non-central stores in the Perth and Kinross area (as a group) are shown to have the potential to support additional convenience goods floorspace towards the end of the plan period. However, this does not mean that such capacity forecasted should necessarily be accommodated in the form of 'non-central' foodstore development (rather the sequential approach should be applied). Moreover, the combined forecasts for Perth and Kinross as a whole reveal a picture of over-supply and as such, there is no quantitative 'need' to plan for new convenience goods floorspace in the area.

8.13 In reality, should proposals for new foodstore development come forward, these are likely to be supported in expenditure terms by attracting market share from existing convenience goods floorspace, including but not limited to the 'non-central' main foodstores which (as set out in section 6 previously) dominate the catchment area market shares and are estimated to be over-trading relative to benchmarks levels. Planning applications for new foodstore development outside a centre, including on 'unallocated' edge-of-centre sites, will need to demonstrate that the proposals would not have unacceptable impacts on existing centres. Such impacts include the likely trading impact on city/town centre convenience stores in addition to the potential impacts on the centre as a whole, including local consumer choice and levels of footfall.

Comparison Goods Floorspace

8.14 Our 'baseline' capacity forecasts for comparison goods floorspace are summarised in Figure 8.3 below. This shows the capacity for new floorspace (sqm net sales area), with the net available expenditure to support new floorspace shown in brackets/grey under the 'sqm net sales area' figures.

8.15 The forecasts assume that any new comparison goods floorspace in the shopping destinations modelled would trade at a 'generic' average sales density of £5,000 per sqm net (grown from 2022 in line with forecast growth in expenditure).

Figure 8.3 – Summary of capacity forecasts: comparison goods (sqm net sales area)

	2027	**2032**	**2037**	Table number (Appendix C)
Perth City Centre	-1,950 (-£10.8m)	-3,150 (-£19.1m)	-4,850 (-£32.6m)	13
Kinross Town Centre	-50 (-£0.2m)	-50 (-£0.4m)	-100 (-£0.7m)	21
Auchterarder Town Centre	-50 (-£0.3m)	-100 (-£0.5m)	-100 (-£0.8m)	29
Crieff Town Centre	-50 (-£0.3m)	-100 (-£0.5m)	-100 (-£0.8m)	37
Strathearn Area (sub-total)	*-100*	*-200*	*-200*	
Alyth Town Centre	0 (-£0.1m)	-50 (-£0.2m)	-50 (-£0.3m)	45
Blairgowrie Town Centre	-150 (-£0.9m)	-250 (-£1.5m)	-400 (-£2.6m)	53
Coupar Angus Town Centre	0 (-£0.1m)	-50 (-£0.2m)	-50 (-£0.4m)	61
Strathmore and the Glens (sub-total)	*-150*	*-350*	*-500*	
Dunkeld & Birnam Town Centre	0 (-£0.1m)	0 (-£0.1m)	-50 (-£0.2m)	69
Aberfeldy Town Centre	-50 (-£0.3m)	-100 (-£0.5m)	-150 (-£0.8m)	77
Pitlochry Town Centre	-50 (-£0.3m)	-100 (-£0.5m)	-150 (-£0.9m)	85
Highland Area (sub-total)	*-100*	*-200*	*-350*	
Non-central stores in Perth and Kinross	350 (£2.0m)	-450 (-£2.6m)	-1,550 (-£10.4m)	94
Combined forecasts for Perth and Kinross	**-2,000**	**-4,400**	**-7,550**	

Notes:
a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
b) Forecasts rounded to the nearest 50 sqm net.
c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

8.16 Figure 8.3 shows that, after allowing for existing comparison goods floorspace to become more efficient by 2% per annum, there will be a substantial and increasing theoretical over-supply of comparison goods floorspace in the Perth and Kinross area from 2027 onwards (with the 'surplus' increasing from about -2,000 sqm net sales area in 2027 to about -7,550 sqm net sales area at the end of the plan period).

8.17 Forecast over-supply is not uncommon for city and town centres in the face of slower growth in per capita comparison goods expenditure and the increasing volume of sales attributed to the internet, which is contributing towards reduced floorspace demand as retailers 'right-size' their store portfolios (as considered previously in section 3 of this report).

8.18 The 'negative' comparison goods capacity forecasted is most significant in Perth City Centre, where we estimate there will be over-supply of about -1,950 sqm net sales area in 2027 (and about -4,850 sqm net sales area in 2037).

8.19 Non-central stores in the Perth and Kinross area (as a group) are also shown to have a substantial theoretical over-supply of comparison goods floorspace towards the end of the plan period. Levels of over-supply in the town centres are more limited.

8.20 Based on the foregoing, there is no quantitative 'need' to plan for new comparison goods floorspace in the Perth and Kinross area. Instead, consistent with the retail market context discussed earlier in this report, there will be a need to consider the contraction / repurposing of such floorspace and how the area's city and town centres should adapt and diversify to secure their vitality and viability. This is explored further in section 11 of this report.

9. Commercial Leisure Needs Assessment

9.1 Leisure uses and activities are an important part of successful town centres and can play a major role in attracting visitors, extending dwell times, and supporting the evening economy.

9.2 In this section, we identify the current supply of key leisure facilities in the Perth and Kinross area (by type and location) and assess whether there are any deficiencies or 'gaps' in the existing commercial leisure offer – with a particular focus on eating and drinking out (i.e. food and beverage uses), cinema, ten-pin bowling, bingo, and gymnasiums and other types of sports facilities. We also recognise the important role of non-commercial leisure attractions such as parks, theatres, museums and other cultural facilities.

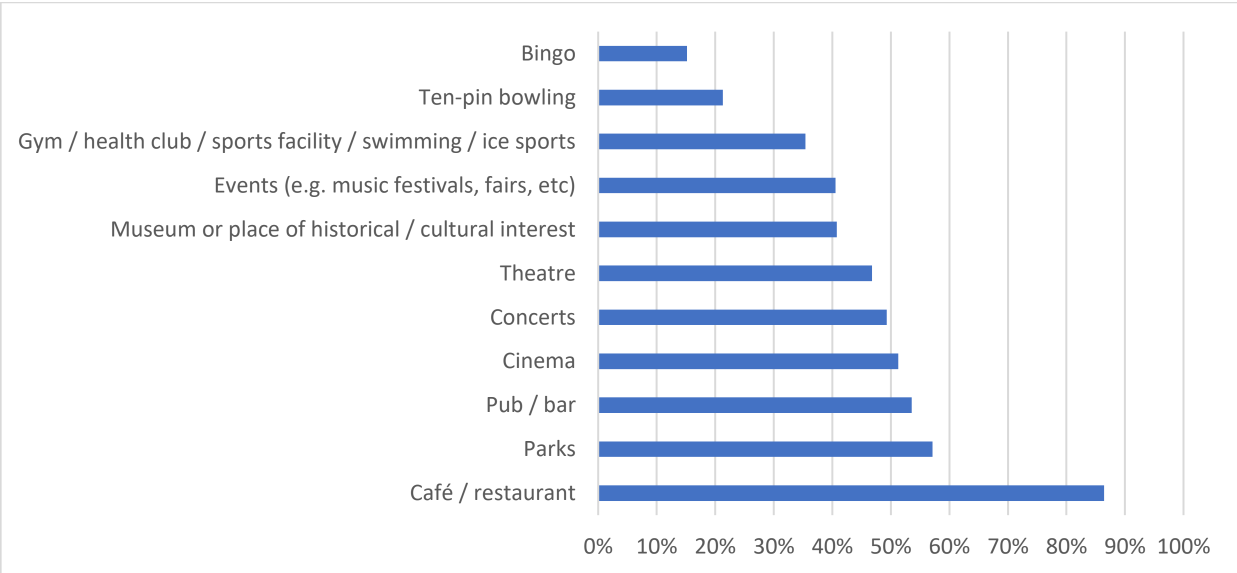
9.3 It should be noted that forecasting the need for commercial leisure provision is more problematic than for retailing. This is due to the unpredictable and highly elastic nature of leisure trips (and associated spending) in addition to a lack of reliable performance data. Consequently, there is no robust method for assessing commercial leisure needs in quantitative terms. Our review is therefore based on high-level qualitative analysis informed by the following:

- the leisure market context and trends identified in section 3;
- our city and town centre reviews in section 4;
- the results of the 2022 household telephone survey (Appendix E); and
- desktop research.

Participation Levels

9.4 Figure 9.1 below shows the level of participation in different types of leisure-based activities by respondents to the household telephone survey which, as described earlier in this report, is based on a catchment area comprising 5 zones (as shown on the map included at Appendix D).

Figure 9.1 – Participation in leisure-based activities across the catchment area



Source: Question 27 of household telephone survey (Appendix E).

9.5 The most popular activity relates to eating out (i.e. café / restaurant), with around 86% of respondents visiting these types of facilities. Drinking out (i.e. pub / bar) is also popular and has the third highest level of participation (around 54% of respondents). The *Eating and Drinking Out* section below considers respondents' frequency of visits to such facilities and the most popular destinations in (and outside) Perth and Kinross.

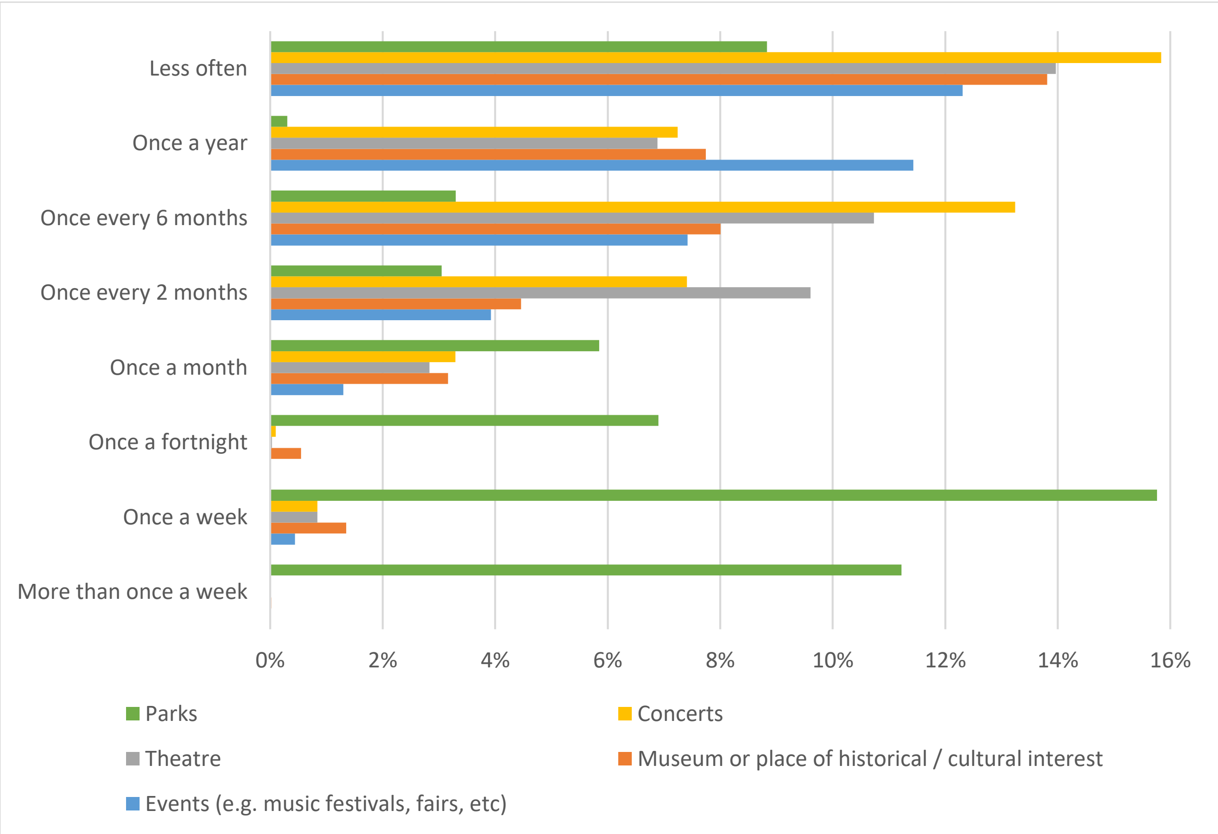
9.6 Parks are the second most popular leisure-based activity. Figure 9.1 indicates that over 57% of survey respondents visit parks, with around a quarter visiting once a week or more (as shown in Figure 9.2 below). When respondents were asked which park(s) they visit most often, the main responses included South Inch Park and Gardens in Perth, MacRosty Park in Crieff, and Victoria Park in Aberfeldy. This further highlights the importance of effective signage and wayfindings between the town centres and the local leisure assets such as parks and visitor attractions.

9.7 Just over half of the respondents visit the cinema and the *Cinema* section below examines this type of activity in more detail, including the frequency of visits and existing provision in Perth and Kinross and the surrounding area.

9.8 The next most common activities – ranging between 40-50% participation – are concerts, trips to the theatre, museums or places of historical / cultural interest, and events (e.g. music festivals, fairs, etc); reflecting the area's range of arts, cultural and live entertainment experiences. These are not commercial leisure facilities but are clearly important and complementary attractions, with Perth City Centre securing the highest catchment area market share of such visits. The survey research identifies Perth Theatre and Concert Hall on Mill Street as a particular attraction for catchment area residents. Further afield, Pitlochry Festival Theatre secures notable market shares from the Highland Area and Strathmore and the Glens, while the main competing locations (outside the catchment area) include Dundee and Edinburgh. Glasgow City Centre is a major 'pull' for event-goers in particular. Figure 9.2 below sets out the survey-indicated frequency of visits which, as one would perhaps expect for these types of activities, are more occasional.

9.9 Participation in other types of leisure-based activities, namely ten-pin bowling and bingo, is much lower (around 21% and 15% respectively) as shown in Figure 9.1 above.

Figure 9.2 – Frequency of visits to 'non-commercial' leisure attractions



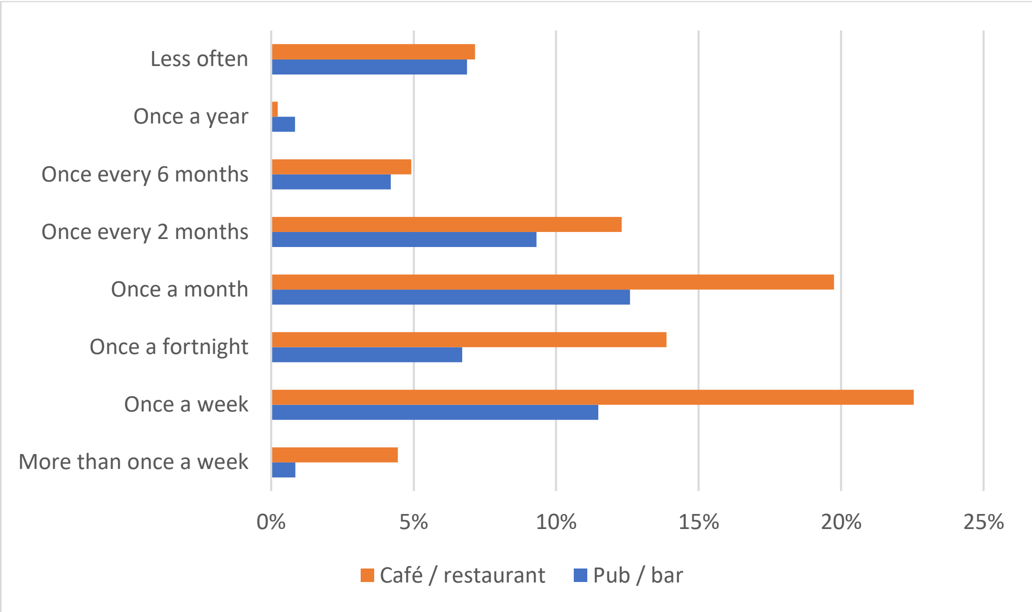
Source: Question 27 of household telephone survey (Appendix E).

Eating and Drinking Out

9.10 A good quality and choice of food and beverage (F&B) uses can help to support a centre's retail function and complement the wider offer by generating footfall and extending dwell times into the evening.

9.11 As identified in Figure 9.1 above, eating out (i.e. café / restaurant) commands the highest participation levels in leisure-based activities across the catchment area, while drinking out (i.e. pub / bar) is also clearly a popular activity. Figure 9.3 below sets out the frequency of visits.

Figure 9.3 – Frequency of visits to 'eating and drinking out' facilities



Source: Question 27 of household telephone survey (Appendix E).

9.12 Over a quarter of respondents visit cafes and restaurants at least weekly, while almost 15% (in addition) eat out fortnightly. One in five eat out once a month. These findings indicate a relatively high frequency of visits.

9.13 Drinking out appears to be a less frequent activity although, of those who do visit the pub / bar, the second highest response was 'once a week' (about 12%) behind 'once a month' (about 13%).

9.14 On the face of it, such trips and spending should support the potential to enhance the scale and choice of F&B uses in the Perth and Kinross area. However, the level of growth will be subject to market conditions and demand.

9.15 To that end, a number of major chains (particularly in the 'casual dining' sector e.g. Carluccio's, Jamie's Italian, Prezzo) downsized nationally pre-pandemic against a backdrop of increased competition and discounting, rising costs, and a tightening of consumer spending in the light of economic uncertainty. Many operators expanded too quickly into increasingly marginal locations and thus the market became saturated and unsustainable.

9.16 The pandemic and (more recently) the cost-of-living crisis has resulted in further challenges to the F&B sector, which, after the 'bounce-back' in spending on eating and drinking out that followed the relaxing of lockdowns and other restrictions, will need to cater for changing consumer demands to remain relevant and viable. This considers the shift in demand for experience-based activities (such as bars offering an additional entertainment element e.g. darts, bowling or golf) as identified in section 3 and the potential role of 'pop-up' restaurants, markets and street food traders.

9.17 Figure 9.4 below provides an overview of existing F&B provision based on the city and town centre reviews set out in section 4 of this report.

Figure 9.4 – Overview of existing F&B provision in the city and town centres

Centre	Summary description
Perth City Centre	The catering offer is a strength for the city centre, with many established independent operators across all parts of the day. The café and coffee shop offer is good, and there is representation from family and fast casual catering operators (albeit not the national multiple brands).
Aberfeldy Town Centre	The daytime food / catering offer is good, with several food styles and price points available. The evening offer is reasonable with 3 pubs, and Italian, Chinese and Indian restaurants.
Alyth Town Centre	There is little F&B provision, limited to a pub and a fish & chip shop.
Auchterarder Town Centre	The daytime F&B offer includes several cafes, delis, restaurants and a couple of fish & chip shops. The night time offer is also good with pubs, takeaways and restaurants, including 2 good quality independent restaurants / wine bars.
Blairgowrie Town Centre	The F&B offer is reasonable, more so the daytime offer than the night time offer which is mainly pub and hot food takeaway dominated. The daytime offer includes a range of cafes, sandwich shops and a Wetherspoons pub.
Coupar Angus Town Centre	Limited F&B provision, with a pub (plus one that appears to have very recently closed), an Indian restaurant and a fish & chip shop.
Crieff Town Centre	A reasonable F&B offer with a variety of food styles available (including cafes, sandwich shops, destination restaurants and themed specialists e.g. Scottish, chocolate, whisky).
Dunkeld & Birnam Town Centre	A high quality F&B offer which provides a strong anchor. There are 8 units dedicated to catering, cafes and restaurants; 3 pubs; and just one takeaway. Many of the shops also offer daytime catering.
Kinross Town Centre	The daytime food / catering offer is good with several food styles and price points available. The evening offer is also reasonable with 2 pubs, and sourdough pizza, Chinese and Italian restaurants.
Pitlochry Town Centre	The catering offer is strong with a good mix of large eateries and smaller coffee shops / cafes. This is supported with 5 hotels close to the town centre.

9.18 Survey respondents were asked where they visit most often for the purpose of eating and drinking out. The market shares secured by Perth City Centre and the nine town centres for café / restaurant (Figure 9.5) and pub / bar (Figure 9.6) respectively are summarised below.

Figure 9.5 – Café / restaurant market share by catchment area zone

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
	Perth City Centre	83%	20%	14%	25%	11%
	Kinross Town Centre	-	28%	-	-	-
Strathearn Area	Auchterarder Town Centre	1%	-	18%	-	-
	Crieff Town Centre	-	-	18%	-	-
Highland Area	Aberfeldy Town Centre	-	-	-	20%	-
	Dunkeld & Birnam Town Centre	1%	-	-	9%	-
	Pitlochry Town Centre	-	-	-	36%	-
Strathmore and the Glens	Alyth Town Centre	-	-	-	-	1%
	Blairgowrie Town Centre	1%	-	-	-	23%
	Coupar Angus Town Centre	-	-	-	-	2%
	Dunblane Town Centre	-	-	13%	-	-
	Dundee City Centre	4%	-	2%	-	21%
	Dunfermline Town Centre	-	9%	-	-	-
	Edinburgh City Centre	1%	7%	2%	-	1%
	Forfar Town Centre	-	-	-	-	29%
	Stirling City Centre	-	-	16%	-	-

Source: Question 30 of household telephone survey (Appendix E).
Notes: Café / restaurant trips tend to be relatively localised and the zone in which each centre lies is highlighted orange.

9.19 Figure 9.5 above confirms that Perth City Centre is the catchment area's principal destination for eating out, dominating in zone 1 (i.e. the Perth 'home' zone) with a market share of 83% whilst also securing notable market shares from each of the other catchment area zones.

9.20 The town centres, with the exception of Alyth and Coupar Angus, secure reasonable market shares from their respective 'home' zones or sub-areas. The findings indicate that cafes and restaurants in these smaller centres cater mainly for localised catchments, with little or no market shares attracted from surrounding zones.

9.21 The main competing destinations for eating out are identified in Figure 9.5. It shows that a high proportion of residents in zone 5 (Strathmore and the Glens) look to Forfar Town Centre and Dundee City Centre for cafes and restaurants.

Figure 9.6 – Pub / bar market share by catchment area zone

		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
	Perth City Centre	75%	8%	8%	-	5%
	Kinross Town Centre	-	34%	-	-	-
Strathearn Area	Auchterarder Town Centre	-	-	21%	-	-
	Crieff Town Centre	-	-	16%	-	-
Highland Area	Aberfeldy Town Centre	-	-	-	30%	-
	Dunkeld & Birnam Town Centre	3%	-	-	32%	-
	Pitlochry Town Centre	1%	-	-	34%	-
Strathmore and the Glens	Alyth Town Centre	-	-	-	-	1%
	Blairgowrie Town Centre	1%	-	-	-	10%
	Coupar Angus Town Centre	-	-	-	-	2%
	Dunblane Town Centre	-	-	27%	-	-
	Dundee City Centre	6%	1%	-	-	25%
	Dunfermline Town Centre	-	10%	-	-	-
	Edinburgh City Centre	3%	17%	4%	-	-
	Forfar Town Centre	-	-	-	-	41%
	Stirling City Centre	-	-	9%	-	-

Source: Question 29 of household telephone survey (Appendix E).
Notes: Pub / bar trips tend to be relatively localised and the zone in which each centre lies is highlighted orange.

9.22 Figure 9.6 above shows that Perth City Centre retains a pub / bar market share of 75% from its home zone. However, the City Centre's penetration across the wider catchment area is much more limited than the 'eating out' shares observed previously.

9.23 The survey research further demonstrates that town centres in the Perth and Kinross area, again with the exception of Alyth and Coupar Angus, secure reasonably strong 'local' market shares only. Forfar Town Centre and Dundee City Centre are main competing destinations to the east[16], while Dunblane Town Centre attracts a pub / bar market share of 27% from zone 3 (Strathearn Area).

9.24 Taking the preceding analysis a step further, the household telephone survey (Question 26) asked respondents what improvements or attractions would encourage them to visit the centres more often in the evening than they currently do. A main response was 'better cafes / restaurants / pubs' (as shown in the tables at Appendix B) and Figure 9.7 below sets out the % responses on centre-by-centre basis[17] comparing the 2022 survey findings with the 2016 Study.

Figure 9.7

Centre	Better cafes / restaurants / pubs	
	2016	**2022**
Perth City Centre	9%	12%
Aberfeldy Town Centre	-	24%
Auchterarder Town Centre	7%	24%
Blairgowrie Town Centre	12%	2%
Crieff Town Centre	16%	26%
Kinross Town Centre	6%	-
Pitlochry Town Centre	10%	9%

Source: Question 26 of household telephone survey (Appendix E).

[16] Forfar Town Centre's zone 5 market share (41%) is principally attributed to respondents living in proximity to the town.
[17] Not including the town centres of Alyth, Coupar Angus and Dunkeld & Birnam because (a) they were not previously assessed for the 2016 Study and (b) the sample achieved for the 2022 household telephone survey is too small.

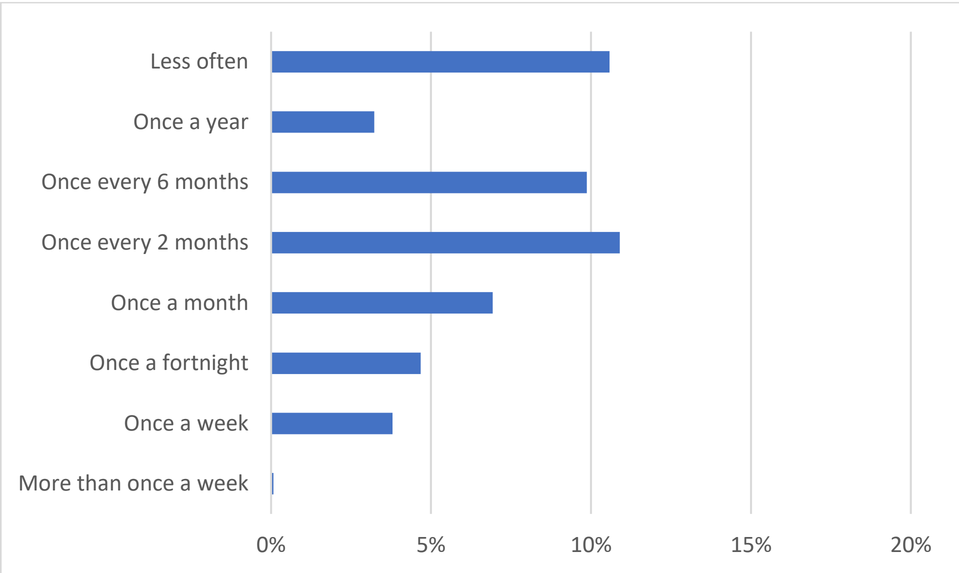
9.25 Overall, the survey findings reflect the growing consumer demand for cafes / restaurants / pubs as consumers seek 'beyond retail' activities, experiences and the ever increasing importance of centres as social places. This is particularly true for Aberfeldy, Auchterarder and Crieff Town Centres and (to a lesser degree) Perth City Centre.

Cinema

9.26 As set out in section 3 of this report, the cinema sector was heavily affected by the pandemic-induced closures and social distancing measures. Recent reports indicate that one of the UK's largest cinema operators, Cineworld, remain concerned about low admission levels.

9.27 Figure 9.8 below reveals how often respondents to the household telephone survey visit the cinema. It confirms that most cinema users visit once every 2 months (11%), whilst almost 7% indicated once a month. However, almost 11% said 'less often' and a further 10% suggested that they visit the cinema just once every 6 months. These findings suggest relatively low levels of participation across the catchment area.

Figure 9.8 – Frequency of visits to Cinema facilities



Source: Question 27 of household telephone survey (Appendix E).

9.28 There are two cinemas in the Perth and Kinross area, namely Perth Playhouse and The Birks Cinema in Aberfeldy. Perth Playhouse on Murray Street is a local, independent IMAX cinema with seven screens; while The Birks Cinema (following its closure in the 1980s) was renovated and relaunched as a small community-led cinema in 2013.

9.29 Perth Playhouse is the most popular cinema destination in the catchment area, securing an overall market share of some 60% as shown in Figure 9.9 below. This includes a 39% market share from the Perth 'home' zone and between 13-26% from zones 2, 3 and 4. The survey-indicated market shares suggest that Perth Playhouse does not have the same influence over residents in zone 5, who tend to visit the cinemas in Dundee, notably Cineworld and Odeon Luxe, which are the main competing facilities from a Perth and Kinross perspective.

9.30 The Birks Cinema, which secures a catchment area market share of 4% according to the survey research, is principally 'most often' used by residents in the Highland Area (attracting a 57% market share from this zone).

Figure 9.9 – Cinema catchment area market share

Cinema destination	Catchment Area % market share
Perth City Centre (i.e. Perth Playhouse)	60%
Aberfeldy Town Centre (i.e. The Birks Cinema)	4%
Main competing destinations outside the catchment area:	
Dundee	20%
Stirling	9%

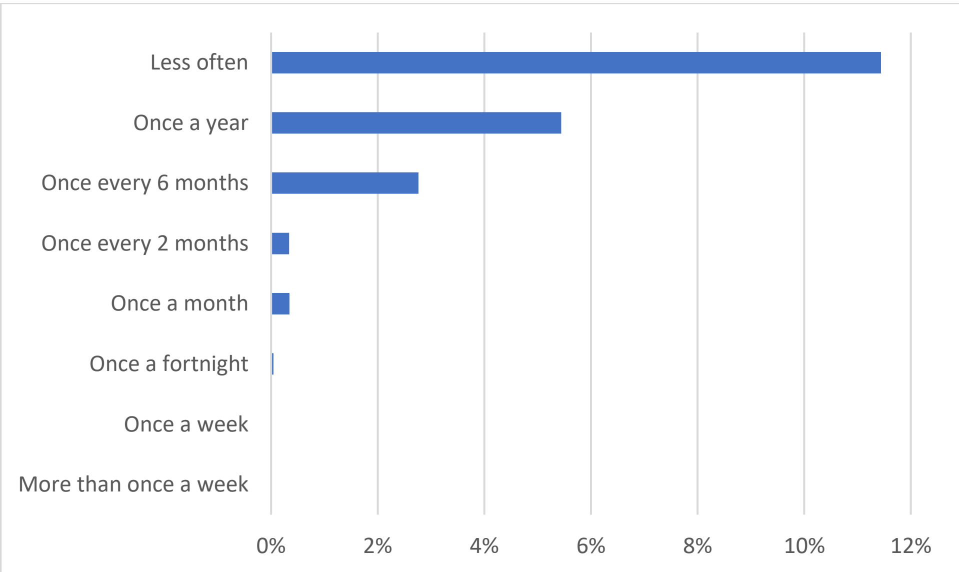
Source: Question 32 of household telephone survey (Appendix E).

9.31 There are plans for two new boutique-style cinemas in the study area, in Auchterarder and Crieff respectively. A planning application has been submitted for the restoration of Auchterarder's old picture house building on Townhead, which would see the return of a cinema to the town for the first time since 1963. Meanwhile, in Crieff, plans have been submitted for a new-build cinema complex on the site of the former Crieff Hotel in East High Street, with potential for two screens and ancillary facilities.

Ten-pin bowling

9.32 Ten-pin bowling is a long-established commercial leisure activity, particularly for families and social groups. Like cinemas, however, such facilities were heavily affected by the pandemic-induced trading restrictions and tend to attract occasional (or less frequent) visits as shown in Figure 9.10 below. Some 79% of respondents to the household telephone survey indicated that they 'never' go ten-pin bowling.

Figure 9.10 – Frequency of visits to Ten-pin bowling facilities



Source: Question 27 of household telephone survey (Appendix E).

9.33 The area's main ten-pin bowling destination forms part of the children's indoor entertainment venue at Noah's Ark in Perth, alongside other attractions such as soft play, a karting track and a ceramics workshop. Figure 9.11 below indicates it secures a catchment area market share of 14%. However, underlining the lack of mainstream (or boutique) ten-pin bowling provision in the Perth and Kinross area, a higher proportion of catchment area residents look to Hollywood Bowl in Dunfermline and AMF Bowling in Stirling.

Figure 9.11 – Ten-pin bowling catchment area market share

Ten-pin bowling destination	Catchment Area % market share
Perth City Centre	2%
Noah's Ark, Old Gallows Road, Perth (out-of-centre)	14%
Main competing destinations outside the catchment area: Dunfermline Stirling	 52% 17%

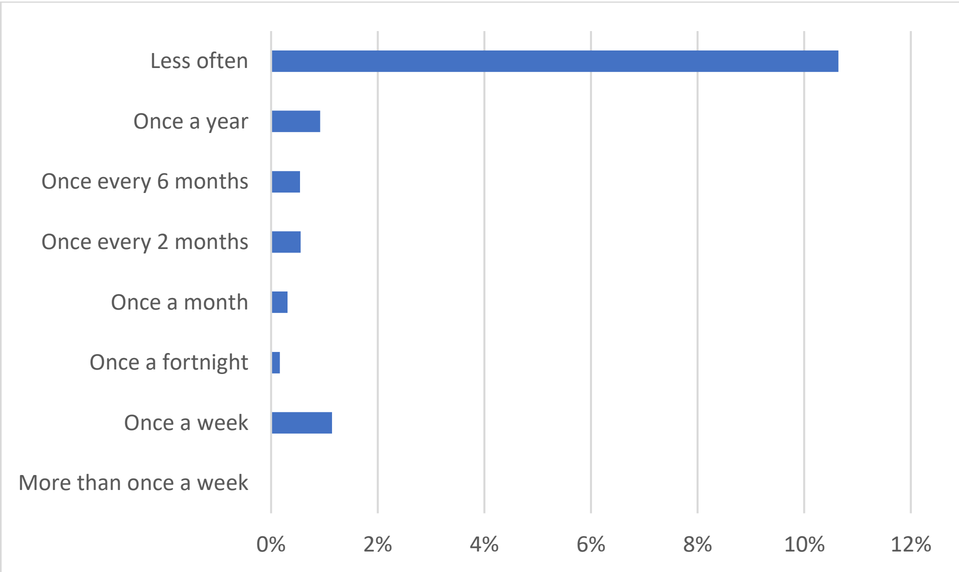
Source: Question 36 of household telephone survey (Appendix E).

Bingo

9.34 The gaming and gambling sector has been faced with falling admissions and therefore closures in the past ten years or so, driven by the indoor smoking ban and a shift to online-based platforms. To that end, about 85% of respondents to the household telephone survey indicated that they 'never' go to the bingo.

9.35 Figure 9.12 below shows catchment area respondents' frequency of visits. Illustrating low participation in bingo, less than 2% of respondents indicated that they visit such facilities once a month or more.

Figure 9.12 – Frequency of visits to Bingo facilities



Source: Question 27 of household telephone survey (Appendix E).

9.36 Premier Bingo in Perth City Centre is the area's main bingo destination. According to the survey research, as set out in Figure 9.13 below, the City Centre retains a 42% market share; while venues in Aberfeldy and Crieff Town Centres secure limited market shares (2% and 1% respectively). Dundee and (to a lesser extent) Stirling are the main competing destinations.

Figure 9.13 – Bingo catchment area market share

Bingo destination	**Catchment Area % market share**
Perth City Centre	42%
Aberfeldy Town Centre	2%
Crieff Town Centre	1%
Main competing destinations outside the catchment area: Dundee Stirling	 37% 6%

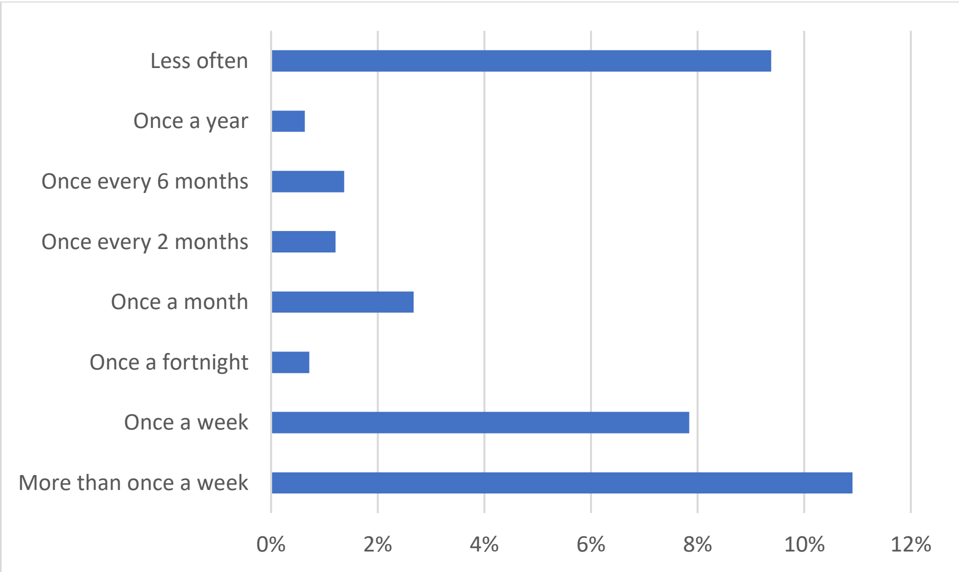
Source: Question 35 of household telephone survey (Appendix E).

Gyms and other sports facilities

9.37 Notwithstanding the impact of the pandemic on this sector, gyms and other sports facilities can make an important contribution towards town centre footfall and activity. The budget gym operators offering flexible and discounted subscriptions have experienced the most significant growth in recent years, while female-only gyms are growing in popularity – yet all operators are faced with increasing competition from 'at home' digital fitness platforms and equipment. This is less the case with swimming, ice sports and those other types of sports which tend to be enjoyed outside of the home at specialist facilities.

9.38 Whilst 65% of respondents to the household telephone survey do not visit gyms and other sports facilities, Figure 9.14 below shows that around 19% visit once a week or more.

Figure 9.14 – Frequency of visits to Gym and other sports facilities



Source: Question 27 of household telephone survey (Appendix E).

9.39 Figure 9.15 below identifies some of the main public and private gyms and other sports facilities in the Perth and Kinross area, as identified through the household telephone survey and our place reviews. It shows that the majority of facilities are situated in 'non-central' locations, the main exceptions identified being Bannatyne Health Club & Spa within the defined Perth City Centre boundary and the Live Active Atholl gym and sports hall in Pitlochry Town Centre. The main destination for ice sports is Dewars Centre (including ice skating and curling) on the western side of Perth City Centre, adjacent to Perth Leisure Pool.

Figure 9.15 – Gyms and other sports facilities in the Perth and Kinross area

Facilities	Location
Bannatyne Health Club & Spa	St Catherines Retail Park, Perth (City Centre)
Bell's Sports Centre	Hay Street, Perth (non-central)
Club 300 Gym & Personal Training	Jeanfield Road, Perth (non-central)
Club 300 Blairgowrie	Jessie Street, Blairgowrie (non-central)
Dewars Centre	Glover Street, Perth (non-central)
Live Active Atholl	West Moulin Road, Pitlochry (Town Centre)
Live Active Blairgowrie	Beeches Road, Blairgowrie (non-central)
Live Active Loch Leven	Lathro Lane, Kinross (non-central)
Perth College Academy of Sport & Wellbeing	Crieff Road, Perth (non-central)
Perth Leisure Pool	Glasgow Road, Perth (non-central)
The Body Academy Gym	South William Street, Perth (non-central)
The Gym Group	St Catherines Retail Park, Perth (non-central)
The Leisure Country Club at Crieff Hydro Hotel	Ferntower Road, Crieff (non-central)

9.40 As mentioned before, budget gyms are a significant growth area including in city centre locations that have lots of workers, residents and visitors. Perth City Centre is unusual in its paucity of gym offer, and this could be a useful way of bringing long-term empty retail units back into occupation.

Summary and Accommodating Commercial Leisure Needs

9.41 The commercial leisure sector is dynamic and changing rapidly. As highlighted earlier, there is no robust method for assessing commercial leisure needs in quantitative terms owing to the unpredictable nature of leisure trips and a lack of reliable performance data.

9.42 This section has therefore reviewed the Perth and Kinross area's commercial leisure needs in qualitative terms, supported by the results of the household telephone survey and other sources of data.

9.43 Having assessed the current supply of key leisure facilities, including regard for survey-indicated participation rates and the main destinations, we set out below any deficiencies in the commercial leisure offer and advise whether (and where) any new provision should be planned for.

9.44 Dealing first with ***F&B provision***, eating and (to a slightly lesser extent) drinking out is the most popular leisure-based activity in the catchment area, with around 86% of respondents to the household telephone survey visiting cafes/restaurants and around 54% visiting pubs/bars. Such facilities help to extend dwell time and hours of activity into the evening and – relative to the 2016 Study – the latest survey findings indicate that there is increased demand among many city and town centre users for better evening F&B options (notably in Aberfeldy, Auchterarder and Crieff Town Centres and also Perth City Centre).

9.45 Perth City Centre is the main destination for eating and drinking out, which is unsurprising given its size and well established catering offer, together with its wider leisure attractions such as Perth Playhouse (cinema) and Perth Theatre and Concert Hall. The City Centre has a lack of representation by the national multiple brands, but is otherwise well served by a variety of independent operators – some of whom have closed recently as a result of ongoing street works. There is scope for its F&B offer to continue to improve and expand, with both national brands and local independents opening.

9.46 The scale of any growth in F&B provision will largely be dependent on market demand. To that end, much will depend on macro-economic conditions and the City Centre's ability to continue to attract shoppers and other visitors which, in turn, will generate footfall and activity to support new (and existing) F&B outlets. New opportunities for city centre living (including residential uses at ground floor level as promoted in Adopted NPF4) and the resulting population growth in and close to the City Centre will have an impact on demand within the F&B sector; however, it remains to be seen whether this would offset the potential loss of custom from office workers attributed to the shift towards agile working and other occupational demand factors which are affecting space requirements in the city centre office market.

9.47 There is unlikely to be a high level of market demand for new F&B provision in town centres across the Perth and Kinross area. Yet the boutique-style cinemas planned for Auchterarder and Crieff, should they come forward, will provide more reason to visit and spend time in the towns and will have the potential to sustain additional F&B provision.

9.48 Many of the town centres have relatively strong catering offers within the limitations of their scale and 'localised' catchments, although clearly the likes of Aberfeldy, Dunkeld and Pitlochry in particular have the advantage of significant visitor numbers to support the range of F&B outlets available. The success of these towns as tourist destinations may provide opportunities and demand for additional catering options, yet a notable limitation is their lack of physical capacity to accommodate further F&B (and other forms of commercial leisure) due to very low vacancy rates.

9.49 Based on the above, and recognising that F&B is one of the few potential growth sectors for the city and town centres, there is a need for a flexible approach to accommodating such uses as and when suitable units become available. In respect of Perth City Centre, this should include the larger units in need of reconfiguration and modernisation, such as the existing voids in and around the 'core' shopping area[18] and the former Debenhams department store (which may also provide opportunities to accommodate large format leisure uses).

9.50 The ***cinema*** offer in the Perth and Kinross area is currently limited to Perth Playhouse and The Birks Cinema in Aberfeldy. The former is the most popular cinema destination in the catchment area while the latter predominantly serves a local catchment as well as the town's many tourists. The main competing facilities are focused in Dundee and Stirling. As identified above, there are plans for new cinema provision in Auchterarder and Crieff respectively; suggesting there is local demand notwithstanding the post-pandemic challenges facing cinema operators and the survey-indicated participation rates. Any additional cinema provision over the plan period, including permanent and 'pop-up' cinemas for indoor or outdoor, should be supported in principle and considered as potentially adding to the offers and reasons to visit smaller rural centres.

9.51 Consumer demand for ***bingo*** facilities has fallen considerably in recent years and the survey research has indicated low participation in this type of leisure-based activity. Whilst the area's few bingo facilities (notably Premier Bingo in Perth City Centre) appear to attract a reasonable catchment area market share, we assess there is no qualitative need for additional provision.

9.52 In terms of future needs for ***ten-pin bowling***, we take the view that the existing main destination at Noah's Ark in Perth (children's indoor entertainment venue) is unlikely to entirely satisfy the demand for this type of activity considering the high market shares attracted to Dunfermline and Stirling from the Perth and Kinross catchment area. That said, low participation rates coupled with an increasingly difficult trading outlook (as consumers tighten their discretional spending) are likely to fetter any scope for additional provision.

9.53 Existing provision and usage of ***gyms and other sports facilities*** is largely dominated by facilities outside the city and town centres. The lack of 'in-centre' provision would suggest there is scope for additional facilities in Perth City Centre and many of the nine town centres, subject to market demand and the availability of premises that can meet operational requirements. Those requirements often dictate that city and town centres are not optimal locations for large format sports facilities (e.g. swimming, ice sports, trampoline parks); hence they are generally situated in 'non-central' locations as is the case in Perth. Nevertheless, should proposals come forward for a new such facilities in or on the edge of the centres, they have the potential to complement and enhance the range of leisure-based experiences available.

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[18] Our healthcheck in section 4 identifies a number of large, prominent vacant units (including at St Johns, High Street, South Street, South Methven and George Street).

9.54 In the longer term, as the catchment area population increases and new development proposals emerge, there may be additional demand for commercial leisure facilities, in which case any such provision should be directed to the 'town centres first' in accordance with the sequential approach to strengthen their diversity of uses and overall vitality. Our policy recommendations in section 11 below discuss this further.

9.55 Non-commercial leisure uses and activities are an important element of the all-round leisure offer and our assessment has identified that trips to parks are the second most popular leisure-based activity. Trips to the theatre, concert venues, museums and other places of historical / cultural interest are also common activities among catchment area residents. These types of facilities and experiences, especially those focused in or close to the city and town centres are important complementary attractions and help to support their retail and service functions.

9.56 There will be a need to support the continued improvement of the quality and choice of such attractions, including additional investment in cultural uses which will see the new Perth Museum open in 2024 and attract a predicted 167,000 visitors per annum. These are a key ingredient of town centre vitality, attracting a high number of visitors from across and well beyond the Perth & Kinross catchment area and, in turn, helping to support important service sector uses such as hospitality and F&B.

10. Key Opportunity Sites

10.1 In this section, we outline planning guidance in relation to four key opportunity sites in Perth City Centre which are critical to its future vitality and viability. These are:

i. Former Debenhams store, High Street
ii. Former Beales store, St John Street
iii. Matalan store, Victoria Street
iv. St John's Shopping Centre

10.2 Our high level assessment is provided within the framework of the policy recommendations set out in section 11 below; but recognising that these large buildings/sites are particularly important and likely to require PKC to take a proactive approach to their future re-use, repurposing or redevelopment.

10.3 For the avoidance of doubt, our commentary on each site does not predetermine any particular form of development and/or mix of uses. This will be a matter for PKC (based on the provisions of the LDP and other material considerations) should proposals come forward. Moreover, our assessment has notable limitations in that it is not informed by:

- feasibility studies to better understand the development potential of a site and its constraints;
- stakeholder engagement and/or soft market testing;
- financial appraisals to test the viability of a development or a particular mix of uses.

10.4 We consider the suitability of each site below for different use types, in addition to the potential role for PKC intervention.

Former Debenhams store, High Street

10.5 The former Debenhams store is highly prominent, situated on High Street with King Edward Street bordering the site to the east. Primark and St John's Shopping Centre adjoins the site to the west. It therefore occupies very much a 'retail' location in the City Centre. Given its proximity to the new Perth Museum it will benefit from the additional footfall to the new attraction.

10.6 However the full re-use of this large, 4 storey building for retail will be difficult to achieve. This is because there are very few retailers in the market interested in stores of this size (although it could feasibly accommodate a much larger Primark).

10.7 Most likely, securing future use(s) for the store will involve reconfiguring and/or repurposing the space for a mix of uses. Suitable re-uses would include smaller retail formats including convenience, services health and wellbeing, experience-based leisure uses (e.g. bowling, mini-golf, go-karting and associated catering), cultural uses, a community hub, offices and co-working space. It appears the scope for residential conversion would be limited by the building's deep floorplate and lack of windows.

10.8 Other options (subject to viability, planning constraints, etc) could include the comprehensive redevelopment of the site for the abovementioned mix of uses, and/or residential uses or a hotel.

10.9 Unlocking this site and the delivery of a suitable scheme will be crucial for the future vitality and viability of Perth City Centre. As such, it presents an opportunity for PKC to intervene to drive delivery – acting as ringmaster, engaging with the landowner and exploring the site's development potential. PKC could support this process through the production of a planning and/or development brief for the site.

Former Beales store, St John Street

10.10 The former Beales store is situated on St John Street. It comprises a listed building, which is a significant constraint in terms of its development potential.

10.11 That said, the store is well located for ongoing active retail, food and drink, and other service sector uses. Its large floorplate is likely to provide an opportunity for reconfiguration and sub-division, so as to create small(er) ground floor units suitable for a range of potential occupiers. The upper floors provide a potential opportunity for residential uses as part of a mixed-use scheme.

10.12 This site presents an opportunity for PKC to intervene to drive forward any improvement works, including engagement with the landlord to explore options and a desirable mix of use types.

10.13 Given its proximity to the new Perth Museum it will benefit from the additional footfall to the new attraction. It also has the potential to build on Perth's recognised status as a City of Craft.

Matalan store, Victoria Street

10.14 Matalan continues to trade and we are not aware of any plans for the store to close. Notwithstanding, we outline below our assessment of the site's future potential from a land use and development perspective.

10.15 The site is bound by Victoria Street to the south, which provides the main frontage and entrance to the Matalan store. There is a surface car park between the store and Victoria Street and extending to the east. Charles Street runs to the west, and there are commercial premises fronting Canal Street to the north.

10.16 The location of the site is somewhat secondary albeit it is within easy walking distance of the 'core' centre and its main attractions. It is also relatively accessible by car, particularly from the south and east of Perth City Centre.

10.17 We consider the site is potentially suitable for a convenience based retailer, including discount foodstore operators, due to its size and 'edge-of-centre' locational characteristics. This would include operators who may not otherwise be attracted into the City Centre. It is therefore a good candidate (and probably the largest) site for meeting the qualitative need for an improved city centre convenience goods offer as identified in section 4. For the same reasons, it is also likely to be suitable for large format leisure uses.

10.18 Subject to viability and other factors, we further consider the site provides an opportunity for residential development and/or retirement living given its accessibility and proximity to nearby attractions including but not limited to shopping and services, community and cultural facilities, and parks. Such uses would bring additional population into the City Centre and have wider benefits in terms of footfall and local spending.

St John's Shopping Centre

10.19 This indoor shopping centre is located within the heart of Perth City Centre. It has over 30 'high street' retailers including Primark, H&M, JD Sports and River Island but lacks an identifiable food and drink offer. The shopping centre contains several vacancies, while the overall quality of the shopping environment/experience is lacking by today's contemporary standards.

10.20 The site is bound by High Street to the north, King Edward Street to the east, South Street to the south and Scott Street to the west. It is situated within easy walking distance of a number of car parks. In locational terms, therefore, the site represents a prime opportunity for substantial improvement and/or redevelopment. PKC currently owns the ground lease, and we understand the service costs associated with the centre's format are high.

10.21 Suitable proposals for the centre – from an asset management perspective – would include broadening the ground floor mix and introducing more experience-based uses including food and drink, as well as community space and co-working space of the type mentioned earlier in section 3. Retail will continue to form an important component of the centre's overall mix, and there may be scope to attract and fill some retailer 'gaps', yet the main focus should be enhancing the all-round experience and offer. This could include an improved programme of events and pop-up attractions.

10.22 There are unlikely to be suitable opportunities for ground floor residential uses within the shopping centre. However, there may be scope for introducing upper floor residential uses through a major reconfiguration of the centre and potentially the street layout. As well as increasing the population of the city centre, this would have the added benefit of reducing service costs and supporting the future vitality of the shopping centre.

10.23 Should redevelopment be feasible and viable, this site presents an opportunity for PKC to intervene to drive delivery due to the Council's ground lease interests and the area's strategic/central location. A high intervention scenario would include land assembly through the acquisition of the former Debenhams store in order to prepare a larger site for development.

11. Summary and Policy Recommendations

11.1 The Retail Group and CPW Planning have been commissioned by PKC to prepare this Study. It provides the evidence base to assist PKC with its work on the LDP review and related economic development frameworks; and supports the development management function of the local planning authority.

11.2 The key findings and conclusions are set out below before making a series of policy recommendations. The report ends with a suggested framework for the regular performance monitoring of the city and town centres.

Study Findings and Conclusions

<u>The health and qualitative needs of the city and town centres</u>

Perth City Centre

11.3 The health of Perth City Centre includes a number of challenges, which are similar to many places of similar stature across the country. Whilst many parts of the city centre are in a good place and it has many positive indicators, there are a number of aspects that will need to be addressed to improve the vitality of the centre. The appearance and number of large visible vacant units in the core pedestrianised part of the city centre, as a result of national failures / strategic trading decisions, is one aspect. Similarly, the clusters of vacant units on a number of other of the main city centre streets also provide indicators that there needs to be pro-active work to fill / repurpose historic retail units, and / or reduce the number of designated retail units.

11.4 However, there are many positive aspects to build on; businesses are generally satisfied with their own performance, even if sales are down year on year. Whilst post covid visit frequency is down, over half of residents are visiting at the same rate as pre Covid. Some businesses report increased transaction values.

11.5 Perth has plenty of opportunities to improve its health and vitality; some of the initiatives already completed, planned and underway (Perth People and Place, Perth Museum, Perth City Development Plan and Vacant Property Development initiatives) are having a positive impact and recognition with visitors and businesses. These need to be built on and expanded. The numbers of strengths and opportunities identified, significantly outweigh the weaknesses and issues. Many of the strengths are physical and long term. This indicates that whilst it might be challenging now for Perth, the outlook (with the implementation of some pro-active initiatives) is a lot healthier, providing opportunities to improve the offer and reasons to visit are taken and implemented. The appeal to visitors and the number of visitors to the city appears to be underutilised at present and is an aspect to capitalise on.

Aberfeldy Town Centre

11.6 Aberfeldy would appear to be in a good position and in reasonable health when considering the findings of the household survey, business survey and objective place review. Businesses are broadly satisfied with it as a place to be doing business. Customers like to use it and use it for a variety of reasons. The strengths and opportunities clearly outweigh the weaknesses and threats.

11.7 Whilst the offer is improving, there are no obvious large scale development sites that would trigger a significant change in the mix, offer and uses of the town. The large hotel in the middle of the town occupies a large plot, but it only needs a makeover and tidy up, not replacing. Change and improvement will happen as units become available and this should be encouraged, whilst maintaining the broad mix of offer and reasons to visit.

Alyth Town Centre

11.8 Overall, it would appear from the findings of the place review that Alyth is in a good state of health and vitality. Although the vacancy rate sounds high, these are mostly on the periphery of the offer. The core reasons to use the town centre (service offer, Co-op, fish & chip shop, specialist comparison goods stores) are generally strong independents and seem to be trading well.

11.9 There are no obvious large development sites that need delivering or bringing forward in the town centre. Opportunities to extend the area of improved public realm should be seized to help the overall cohesiveness of the town centre.

Auchterarder Town Centre

11.10 Auchterarder is undoubtedly in good health. Vacancies are low, many independent retailers (especially the boutique stores) are best in class. Businesses are trading well and are optimistic about the future. For sure there are some minor improvements that could be made to improve the customer experience (more crossing points, better sense of arrival, more seating etc) but fundamentally, the town centre is in sync with its customers and in a good shape as a result.

11.11 There are no vacant, stalled or priority development sites that need priority attention.

Blairgowrie Town Centre

11.12 Overall, it would appear from the findings of the place review, business survey and household survey that Blairgowrie is in a reasonable state of health. Although the offer looks weak in parts because of the number of vacant units, charity shops, temporary tenants and first impressions. Fundamentally the town centre remains a strong offer, if a little hidden, because of the wide choice of comparison goods specialists and the positive customer visit pattern.

11.13 There are no large development sites that need bringing forward in the town centre, although several smaller units need investment and upgrading.

Coupar Angus Town Centre

11.14 Coupar Angus Town Centre appears to be struggling at the moment and in decline. Although we did not capture any robust empirical data in the two surveys, it is clear from the high vacancy rate, poor retail experience and levels of existing motivation that businesses in the town centre are finding times tough. The draft CAP does provide many strong recommendations and is the basis for a good route map to improve the centre.

11.15 There are no key development sites in the town centre that need bringing forward, as the two key ones (former Royal Hotel, Town Hall and site opposite on George Street) have recently been improved. There is however the old Strathmore Hotel adjacent to the town centre on the other side of the A94 which seems to be in quite a perilous and poor-quality condition. This further creates an impression of a closed centre, and it is more visible than the trading offer.

Crieff Town Centre

11.16 Assessing the health and vitality for Crieff is quite tricky. On the one hand the town centre appeared to be clearly on the 'up' five years ago, extending its offer, improving the customer experience and adding more layers of appeal. Crieff has many strong core attributes in place, and these will underpin future growth and improvement.

11.17 Looking at town centre and the evidence today, it seems to have gone through a considerable downturn over the last 3 years, presumably accelerated by the pandemic and national trends. It seems to have been unlucky in so much that several national retailers have rationalised their store networks and / or have stopped trading and closed their units in Crieff. As a result, the town centre looks poor, in decline and facing a considerable challenge to get back on its feet.

11.18 Despite the recent issues, there remain lots of reasons to be positive about Crieff Town Centre going forward. Its environment, history and heritage, location, existing assets and anchors nearby and around it in the area remain positive. We would therefore conclude that if nothing is done, the town centre is likely to further decline. If on the other hand a robust, growth focussed action plan (to include aspects identified in the recent CAP) could be developed and implemented, then its potential future could be a strong and positive one.

Dunkeld Town Centre

11.19 Dunkeld is clearly in good position and health when considering the findings of the household survey, business survey and objective place review. Businesses are very satisfied with it as a place to be doing business. Tourist visitors are an important customer group and clearly like to use it, and use it for a variety of reasons. The strengths and opportunities clearly outweigh the weaknesses and threats. The weaknesses and threats are focussed around the dependency on tourist visitors.

11.20 Whilst the offer is improving through investment and new arrivals, there are no obvious large scale development sites that would trigger a significant change in the mix, offer and uses of the town. Change and improvement will happen as units become available and this should be encouraged; enabling an improved offer for local residents is something to encourage.

Kinross Town Centre

11.21 Overall, it would appear from the findings of the place review, business survey and household survey that Kinross is in a good state of health, is thriving and well placed in regards future trading prospects.

11.22 There are no urgent or pressing development sites that need addressing, occupying or developing, other than the tatty looking former pub building fronting onto Burns-Begg Street.

11.23 The town would benefit from the reopening of Loch Leven Pier and Lochleven Castle along with better signage and events to integrate the town centre with these two appealing and adjacent offers.

Pitlochry Town Centre

11.24 Given the findings of the household survey, business survey and place review it is fair to say that Pitlochry is in good health. Businesses report good levels of trade with 56% trading level or up on pre Covid levels (only 22% are down). Furthermore, businesses are very satisfied with their performance and that of the town, and they would recommend it as a place to trade.

11.25 Residents report a reasonable visit frequency with over half visiting at least weekly. Pitlochry is an established tourist destination and stop off point. It is catering well for the visitor, from shops, eateries and hospitality. The environment is appealing and complements the super local natural environment.

11.26 There is a little concern that the town may be losing its appeal to local residents, although they are using it for food and general shopping. Additional effort to increase the appeal, both day and evening appeal, to the local resident would be worth its while. Delivery of the CAP recommendations will improve the appeal to local residents.

Population and expenditure growth, retail capacity forecasts, and implications

11.27 The population of the Perth & Kinross catchment area, as defined for the purpose of this Study (and consistent with the 2016 Study), is expected to increase by about 4% to 213,648 by 2037. This population growth and the expenditure arising[19] will be available to support existing/new shops and services in the Perth and Kinross area; and will be boosted by 'inflow' expenditure from visitors who live outside the catchment area.

11.28 Clearly, however, not all available expenditure in the catchment area will be spent in city/town centres in the Perth and Kinross area. A substantial proportion will be spent online and/or 'leaked' to competing shopping destinations. The retail capacity forecasts prepared for this Study account for this, informed by a new household telephone survey of shopping patterns.

11.29 Our capacity forecasts represent the 'baseline' scenario for new retail floorspace in the Perth and Kinross area, in which we assume that the 2022 survey-derived pattern of market shares of convenience and comparison goods expenditure, in each of the shopping destinations modelled, remains unchanged throughout the forecasting period.

[19] See paragraphs 7.28-7.30 in section 7 of this report for convenience and comparison goods expenditure growth forecasts in the catchment area. No expenditure forecasts are available in respect of retail and non-retail services.

11.30 The retail capacity forecasts, particularly beyond the next five years, should be treated with a degree of caution as they are based on various assumptions and forecasts that can and will change. Indeed, the substantial 'spare' capacity previously forecasted by 2026 (in the 2016 Study) is now superseded by over-supply.

11.31 The summary table below shows the capacity for convenience goods floorspace (sqm net sales area), with the net available expenditure to support new such floorspace shown in brackets/grey under the 'sqm net sales area' figures. It presents our individual capacity forecasts for convenience goods floorspace in the city and town centres and the 'non-central' shopping destinations, together with our overall (i.e. combined) forecasts for the Perth and Kinross area. The combined forecasts show that there will be a substantial theoretical over-supply of convenience goods floorspace from 2027 onwards, reflecting in part a short term reduction in per capita expenditure on convenience goods before a return to limited increases as the eating out of the home sector continues to impact on food and drink spending behaviour.

11.32 The amount of 'surplus' floorspace identified in Perth City Centre is about -1,500 sqm net sales area; and over-supply is also forecasted for Blairgowrie Town Centre (about -1,850 sqm net sales area) and Crieff Town Centre (about -900 sqm net sales area). The capacity forecasts for the other town centres broadly represent a level of equilibrium, suggesting limited expenditure-based capacity to support additional convenience goods floorspace.

11.33 Notwithstanding the overall picture of substantial over-supply, non-central stores in the Perth and Kinross area (as a group) are shown to have the potential to support additional convenience goods floorspace towards the end of the plan period. However the sequential approach should be applied.

11.34 In reality, should proposals for new foodstore development come forward, these are likely to be supported in expenditure terms by attracting market share from existing convenience goods floorspace, including but not limited to the 'non-central' main foodstores in Perth and Kinross. Ultimately, however, the lesser the expenditure-based capacity for new floorspace, the greater the impacts are likely to be on existing floorspace. Planning applications for new foodstore development outside a centre, including on 'unallocated' edge-of-centre sites, will need to demonstrate that the proposals would not have unacceptable impacts on existing centres. Such impacts include the likely trading impact on city/town centre convenience stores in addition to the potential impacts on the centre as a whole, including local consumer choice and levels of footfall.

Summary of capacity forecasts: convenience goods (sqm net sales area)

	2027	**2032**	**2037**	Table no. (Appendix C)
Perth City Centre	-1,500 (-£17.3m)	-1,450 (-£16.9m)	-1,450 (-£16.6m)	13
Kinross Town Centre	-200 (-£2.2m)	-200 (-£2.1m)	-200 (-£2.1m)	21
Auchterarder Town Centre	0 (-£0.1m)	0 (£0.1m)	50 (£0.4m)	29
Crieff Town Centre	-900 (-£10.5m)	-900 (-£10.3m)	-900 (-£10.1m)	37
Strathearn Area (sub-total)	*-900*	*-900*	*-850*	
Alyth Town Centre	-300 (-£3.2m)	-300 (-£3.2m)	-250 (-£3.2m)	45
Blairgowrie Town Centre	-1,850 (-£21.3m)	-1,800 (-£20.9m)	-1,800 (-£20.5m)	53
Coupar Angus Town Centre	n/a (n/a)	n/a (n/a)	n/a (n/a)	61
Strathmore and the Glens (sub-total)	*-2,150*	*-2,100*	*-2,050*	

Dunkeld & Birnam Town Centre Aberfeldy Town Centre Pitlochry Town Centre *Highland Area (sub-total)*	-150 (-£1.6m) 300 (£3.6m) 50 (£0.3m) *200*	-150 (-£1.5m) 350 (£3.8m) 50 (£0.6m) *250*	-150 (-£1.5m) 350 (£4.1m) 100 (£0.9m) *300*	69 77 85
Non-central stores in Perth and Kinross	-550 (-£6.3m)	50 (£0.5m)	700 (£8.2m)	94
Combined forecasts for Perth and Kinross	**-5,100**	**-4,350**	**-3,550**	

Notes:
a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
b) Forecasts rounded to the nearest 50 sqm net.
c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

11.35 The position in respect of comparison goods floorspace is also one of substantial (and increasing) over-supply, as set out in the summary table below, with the 'surplus' increasing from about -2,000 sqm net sales area in 2027 to about -7,550 sqm net sales area at the end of the plan period.

11.36 Forecast over-supply is not uncommon for city and town centres in the current climate and it is perhaps unsurprising that the 'negative' comparison goods capacity forecasted is most significant in Perth City Centre. Non-central stores in the Perth and Kinross area (as a group) are also shown to have a substantial theoretical over-supply of comparison goods floorspace towards the end of the plan period. Levels of over-supply in the town centres are more limited.

11.37 On this basis, there is no quantitative 'need' to plan for new comparison goods floorspace and there will be a need to consider the contraction / repurposing of such floorspace and how the area's city and town centres should adapt and diversify to secure their vitality and viability.

Summary of capacity forecasts: comparison goods (sqm net sales area)

	2027	**2032**	**2037**	Table no. (Appendix C)
Perth City Centre	-1,950 (-£10.8m)	-3,150 (-£19.1m)	-4,850 (-£32.6m)	13
Kinross Town Centre	-50 (-£0.2m)	-50 (-£0.4m)	-100 (-£0.7m)	21
Auchterarder Town Centre Crieff Town Centre *Strathearn Area (sub-total)*	-50 (-£0.3m) -50 (-£0.3m) *-100*	-100 (-£0.5m) -100 (-£0.5m) *-200*	-100 (-£0.8m) -100 (-£0.8m) *-200*	29 37
Alyth Town Centre Blairgowrie Town Centre Coupar Angus Town Centre *Strathmore and the Glens (sub-total)*	0 (-£0.1m) -150 (-£0.9m) 0 (-£0.1m) *-150*	-50 (-£0.2m) -250 (-£1.5m) -50 (-£0.2m) *-350*	-50 (-£0.3m) -400 (-£2.6m) -50 (-£0.4m) *-500*	45 53 61
Dunkeld & Birnam Town Centre Aberfeldy Town Centre	0 (-£0.1m) -50 (-£0.3m)	0 (-£0.1m) -100 (-£0.5m)	-50 (-£0.2m) -150 (-£0.8m)	69 77

Pitlochry Town Centre *Highland Area (sub-total)*	-50 (-£0.3m) *-100*	-100 (-£0.5m) *-200*	-150 (-£0.9m) *-350*	85
Non-central stores in Perth and Kinross	350 (£2.0m)	-450 (-£2.6m)	-1,550 (-£10.4m)	94
Combined forecasts for Perth and Kinross	**-2,000**	**-4,400**	**-7,550**	

Notes:
a) The forecasts (and the net available expenditure figures shown in brackets/grey) are cumulative i.e. the forecasts for each year include the forecasts for the previous years and are not additional to those earlier forecasts.
b) Forecasts rounded to the nearest 50 sqm net.
c) Net available expenditure to support new floorspace (shown in brackets/grey) rounded to the nearest £0.1m.

11.38 Given the current picture of forecast over-supply, we have developed our retail capacity analysis to estimate the degree to which the city and town centres are likely to contract (or otherwise) over the plan period in terms of their overall scale of retail floorspace. This is expressed as a percentage of the total existing (2022) convenience and comparison goods floorspace within each centre, as shown in the table below. It assumes survey-derived market shares remain unchanged.

Estimated change in total retail floorspace by 2037

	Total existing convenience and comparison goods floorspace (2022)	**Forecast capacity for new convenience and comparison goods floorspace (2037)**	**Percentage change in total retail floorspace (2022-2037)**
Perth City Centre	43,320 sqm gross 34,656 sqm net	-6,300 sqm net	-18%
Kinross Town Centre	1,905 sqm gross 1,524 sqm net	-300 sqm net	-20%
Auchterarder Town Centre	4,692 sqm gross 3,754 sqm net	-50 sqm net	-1%
Crieff Town Centre	8,334 sqm gross 6,667 sqm net	-1,000 sqm net	-15%
Alyth Town Centre	1,010 sqm gross 808 sqm net	-300 sqm net	-37%
Blairgowrie Town Centre	15,589 sqm gross 12,471 sqm net	-2,200 sqm net	-18%
Coupar Angus Town Centre	560 sqm gross 448 sqm net	-50 sqm net	-11%
Dunkeld & Birnam Town Centre	1,100 sqm gross 880 sqm net	-200 sqm net	-23%
Aberfeldy Town Centre	2,150 sqm gross 1,720 sqm net	200 sqm net	12%
Pitlochry Town Centre	7,219 sqm gross 5,775 sqm net	-50 sqm net	-1%

Notes:
a) Gross floorspace figures derived from Experian Goad for Perth, Kinross, Auchterarder, Crieff, Blairgowrie and Pitlochry; and from ProMap (estimated) for Alyth, Coupar Angus, Dunkeld & Birnam and Aberfeldy.
b) Net floorspace based on generic 80% net to gross ratio.

11.39 The estimated percentage change in total retail floorspace, as shown in the table above for the city and town centres, is necessarily indicative but serves to highlight the degree to which most of the centres are likely to be faced with retail contraction over the plan period to 2037. This analysis is consistent with the market review set out in section 3, which points to store closures and the trend of retail space being converted to other uses in the light of reduced retailer demand.

11.40 For most centres, the forecast contraction equates to one or two retail units; and we would expect these to be repurposed rather than removed as active commercial space. The issue is likely to be most significant for the larger centres, notably Perth City Centre but also the likes of Blairgowrie and Crieff, which have a substantial amount of retail floorspace and are increasingly exposed to retailer's store rationalisation programmes and/or store failures. These larger centres are also (to varying degrees) somewhat reliant on the existing retail offer to drive trips.

11.41 The levels of retail contraction estimated are in spite of expected population and expenditure growth. The additional population will, however, bring wider benefits and opportunities in terms of supporting services and other local businesses in the Perth and Kinross area. Indeed, it has the potential to increase the demand for certain service sector uses that cannot be delivered or enjoyed online. Particular growth sectors (as highlighted in the market review in section 3) include health and beauty, and experience-based leisure uses including but not limited to F&B. It is difficult to quantify the likely scale of such growth; however, it is reasonable to assess that some of the space 'lost' through retail contraction will be replaced or reoccupied by other active commercial uses. Some space may also be repurposed for ground floor residential and/or office uses.

11.42 Through the Vacant Property Development initiatives, PKC offers advice and grant funding support to commercial property owners to upgrade and re-purpose their vacant properties for alternative uses.

Commercial leisure needs

11.43 This Study has set out how commercial leisure uses and activities (and non-commercial e.g. theatres, museums, parks) play an important role in contributing to the vitality and viability of the city and town centres in the Perth and Kinross area.

11.44 As is to be expected, Perth City Centre is the main destination for eating and drinking out (i.e. F&B) with its well established catering offer and wider leisure attractions such as Perth Playhouse (cinema) and Perth Theatre and Concert Hall. The City Centre has had a lack of representation by the national multiple brands for many years. This may now have been a benefit. The centre is well served by a variety of independent operators. That said, there is qualitative potential for an increased offer, including more national operators.

11.45 The scale of any growth in F&B provision will largely be dependent on market demand. To that end, much will depend on macro-economic conditions and the City Centre's ability to continue to attract shoppers, workers and other visitors which, in turn, will generate footfall and activity to support new (and existing) F&B outlets. New opportunities for city centre living (including residential uses at ground floor level as promoted in Adopted NPF4) and the resulting population growth in and close to the City Centre will have an impact on demand within the F&B sector; however, it remains to be seen whether this would offset the potential loss of custom from office workers associated with the shift towards more 'agile' forms of working.

11.46 There is unlikely to be a high level of market demand for new F&B provision in town centres across the Perth and Kinross area. Yet the boutique-style cinemas planned for Auchterarder and Crieff, should they come forward, will provide more reason to visit and spend time in the towns and will have the potential to sustain additional F&B provision.

11.47 Many of the town centres have relatively strong catering offers within the limitations of their scale and 'localised' catchments, although clearly the likes of Aberfeldy, Dunkeld and Pitlochry in particular have the advantage of significant visitor numbers to support the range of F&B outlets available. The success of these towns as tourist destinations may provide opportunities and demand for additional catering options, yet a notable limitation is their lack of physical capacity to accommodate further F&B (and other forms of commercial leisure) due to very low vacancy rates.

11.48 Recognising that F&B is one of the few potential growth sectors for the city and town centres, there is a need for a flexible approach to accommodating such uses as and when suitable units become available. In respect of Perth City Centre, this should include existing voids and the larger units in need of reconfiguration and modernisation (which may also provide opportunities for other forms of commercial leisure).

11.49 The study area is currently represented by two cinemas (Perth Playhouse and The Birks Cinema in Aberfeldy), while Dundee and Stirling provide the main competition. The cinema plans for Auchterarder and Crieff suggest there is local demand. Any additional cinema provision over the plan period, including permanent and 'pop-up' cinemas for indoor or outdoor, should be supported in principle and considered as potentially adding to the offers and reasons to visit smaller rural centres.

11.50 It is not considered there is a need to plan for additional bingo, ten-pin bowling or other large format leisure uses although it is worth remembering of course that these are some of the few activities with particular appeal to families with children in city and town centres. In the longer term, as the catchment area population increases and new development proposals emerge, there may be additional demand for commercial leisure facilities, in which case any such provision should be directed to the 'town centres first' in accordance with the sequential approach to strengthen their diversity of uses and overall vitality.

11.51 Non-commercial leisure uses and activities are an important element of the all-round leisure offer and our assessment has identified that trips to parks, theatres, concert venues, museums and other places of historical / cultural interest are popular leisure-based activities among catchment area residents. These types of facilities and experiences, especially those focused in or close to the city and town centres are important complementary attractions and help to support their retail and service functions.

11.52 There will be a need to support the continued improvement of the quality and choice of such attractions, including additional investment in cultural uses which will see the new Perth Museum open in 2024 and attract a predicted 167,000 visitors per annum. These are a key ingredient of town centre vitality, attracting a high number of visitors from across and well beyond the Perth & Kinross catchment area and, in turn, helping to support important service sector uses such as hospitality and F&B.

Centre futures and strategy

11.53 Section 3 of this report has provided an overview of the retail and leisure (and office) markets and discussed some of the key changes in those sectors prior to, and as a result of, the Covid-19 pandemic which will have a number of potential implications for centres in the Perth and Kinross area.

11.54 Each centre will be affected in different ways although all centres are likely to face growing pressures and potentially business closures due to the cost of living crisis, labour shortages and supply chain issues. All centres, regardless of scale, will also need to be more multi-purpose in their offer, use and experience.

11.55 The Study findings and wider trends point to a number of likely implications for Perth City Centre, the nine town centres and the area's smaller neighbourhood centres (as considered below).

Perth City Centre

11.56 The impact of Covid-19 has highlighted the extent to which larger centres rely on traditional retail and service formats, indoor leisure and cultural venues, office workers and generally high levels of activity to support their vitality and viability.

11.57 Pandemic-induced change in shopping and lifestyle habits, including the shift towards home or 'agile' working, will continue to impact on the way that sub-regional centres (such as Perth City Centre) are used. Such centres struggled during the pandemic as most shops and other businesses were forced to close, resulting in more people working from or close to home and/or shopping locally in smaller centres, with significant consequences for footfall and activity.

11.58 Household survey research commissioned for this Study reveals that consumers who cited Perth City Centre as the centre they visit 'most often' for shopping and services no longer visit as frequently. Some 41% of respondents indicated they visit the city centre 'less often' than before the Covid-19 pandemic, while 53% visit 'about the same' post-pandemic. This poses an ongoing risk for the City Centre as consumers increasingly demand convenience and use larger centres for more occasional (comparison goods) purchases and/or leisure-based experiences that are not available in their local centres.

11.59 The trend towards 'right-sizing' has led retailers (and increasingly leisure operators) to target the most defensible and high-demand locations, where footfall and consumer spending is most resilient to economic changes. This is now affecting more and more larger centres. Perth City Centre is increasingly exposed to such trends; a recent case example being the lifestyle retailer Joules which fell into administration in November 2022, resulting in the closure of its St Johns Street store and highlighting the fragility of even the strongest brands.

11.60 The city centre's role as a principal comparison goods shopping destination also makes it susceptible to wider structural changes in the retail sector and the growth of online shopping, which is increasing the propensity of consumers to buy comparison goods online rather than in-store. Our analysis suggests the centre's existing retail offer could contract by approximately one-fifth by the end of the plan period; some of which may be replaced or reoccupied by services and other active commercial uses as the population grows.

11.61 The foregoing underlines the need for Perth City Centre to be more multi-purpose in its offer and provide consumers with a range of physical uses and experiences that are not available online or in their local centre. This could include better quality and more choice of F&B operators, targeting missing components of the city centre leisure offer (e.g. indoor golf, climbing, themed hospitality) as well as opportunities for an indoor foodhall to complement its already strong independent catering offer and a 'makers' market to attract creative industries and local start-ups. These types of attractions would help to diversify the city centre offer, improve the reasons to visit and extend hours of activity. They also create unique identities that help to define and enhance the sense of place. Providing high quality spaces, with shared tables and chairs, curated markets, events and performances all help to create more of an experience that is unique and cannot be provided online.

11.62 An important theme in this regard will be space sharing and identifying opportunities for repurposing redundant or under-utilised retail spaces. This would involve working with landlords to bring forward flexible lease arrangements and fit-out obligations. Engagement with local businesses and entrepreneurs would help to identify the type of accommodation that is needed by existing businesses seeking to expand or those seeking to open in the city centre. Effective repurposing is unlikely to occur without dedicated opportunity evaluation and assessments; simply waiting for new alternative operator(s) is not a pro-active action.

11.63 It will be particularly important to the vitality and viability of Perth City Centre that PKC takes a proactive approach to securing a successful future for the following four large buildings/sites considered in section 10:

i. Former Debenhams store, High Street
ii. Former Beales store, St John Street
iii. Matalan store, Victoria Street
iv. St John's Shopping Centre

11.64 Other important themes will include creating the right conditions for investment (e.g. extending the public realm improvements as identified in the city centre healthcheck at section 4); improving accessibility and connectivity with surrounding attractions; and providing a strong digital proposition to better align the city centre's offer with consumer demands and the needs of retailers as they look to integrate physical and online platforms.

11.65 There is also potential for new residential development in and close to Perth City Centre, which will help to generate new trips, footfall and spend for the benefit of existing shops and businesses, as well as supporting new provision. However, as the *Scottish City Centres* report prepared by Savills (December 2022) highlights, the City Centre's residential market is weak, particularly for apartment accommodation, with rental values and demand not sufficient to attract institutional investment in residential product to rent.

The town centres

11.66 The nine town centres in the Perth and Kinross area will also need to diversity their offers and user experiences to remain relevant and attractive. Although the town centres are generally less susceptible to the trend of retailer downsizing (relative to Perth City Centre) they will need to become more multi-purpose in the context of changing consumer behaviours, the growth of online shopping, and the increasing prospect of retail business closures.

11.67 The town centres are unlikely to support new retail development over the next 5-10 years and beyond. Retail contraction is more likely for most centres, albeit comprising a very small number of units. Although retail will remain a key part of their respective offers and an important driver of activity, town centre strategies and policies should promote greater flexibility to ensure centres can respond and adapt to future trends and changes. This flexibility and diversity will, in turn, help to create more resilient and attractive centres. The good news is that all of the centres outside of Perth are dominated by independent businesses who are resilient to national chain closures. These businesses are also facing challenging times, and are in need of help and support given the current and forecast economic climate.

11.68 Some of the town centres – including but not limited to Aberfeldy, Dunkeld & Birnam and Pitlochry Town Centres – may fare better than others due to their attractiveness to and reliance on tourists (including those from oversees who are likely to benefit from a weaker pound relative to the dollar). Equally, there may be other opportunities to improve the visitor appeal of more centres.

11.69 The trend to home-working and the emerging interest in flexible co-working hubs in smaller towns (such as the examples in Crieff and Dunkeld identified in the Employment Land Report) should benefit the town centres in a number of important respects. Firstly, more of the area's population working from home will meet their essential day-to-day shopping and service needs close to where they live, which will help to strengthen the vitality and viability of those local centres and businesses. Secondly, there is likely to be increased demand for offices in the town centres, potentially in the form of repurposed retail space and flexible co-working space in larger mixed-use buildings.

11.70 The need to invest in the quality of town centre environments (including shop fronts, streetscapes and public realm) will also be important to create more attractive, accessible and safe places to visit and spend time in as highlighted above.

11.71 Most of the town centres, bar Crieff, Blairgowrie and Coupar Angus appear to be either thriving or in good health. Crieff and Blairgowrie have loyal shoppers, rich histories and some excellent independent businesses. With the right support and intervention from the Council, and well designed and appropriate Growth Action Plans developed in conjunction with local businesses in each place, there is every reason to believe that these centres can thrive in the future. Coupar Angus is the one centre that seems to be facing an uncertain future and it may be that this centre be downgraded to a neighbourhood centre, with the existing town centre being allowed to contract and refocus.

Perth's neighbourhood centres

11.72 Smaller 'localised' centres tended to be more resilient to Covid-19 impacts as more people worked from or close to home and/or chose to shop locally where possible. In this respect and considering the principles of 20-minute neighbourhoods, the existing network of neighbourhood centres in Perth play an important role in terms of promoting local businesses, providing access to key services and facilities, and encouraging more sustainable forms of travel.

11.73 These types of centres predominantly cater for the day-to-day service needs of local residents and typically include a limited offer in respect of convenience goods. They are therefore less exposed to the structural changes in the retail sector but will still be 'at risk' as consumers increasingly shop around for best value at larger format discount stores, supermarkets as well as online businesses.

11.74 In section 5, our neighbourhood centre reviews have identified that Perth's stronger neighbourhood centres are those with a reasonable convenience offer (as an anchor), supported by a hair and beauty offer, a selection of services providers (as daytime footfall generators), and a take-away offer (for both day and night-time business).

11.75 Centres close to major foodstores, particularly those that don't have the offer outlined above, are struggling to maintain vitality.

11.76 The local neighbourhood centres need to remain as accessible and convenient as possible. This need for good accessibility relates to walking, cycling, public transport as well as car users (trade from passing traffic is likely to be a substantial component of spend). Short term on-street car parking will continue to be important. Many will benefit from the Perth People and Place initiatives looking to enhance the 20-minute liveable neighbourhood, with improvements to all modes of transport and access to neighbourhood centres.

11.77 Engaging with local businesses to help them grow their businesses as well as working together for the betterment of the centre will be increasingly important going forward.

Policy Recommendations

11.78 Drawing upon the up-to-date evidence and findings set out above, this section aims to provide PKC with bespoke policy recommendations to inform its review of the LDP and spatial strategy for the Perth and Kinross area.

11.79 Our advice considers:

i. The appropriateness of the area's city and town centre hierarchy (as existing), having regard to the assessed role and function of each centre and their potential to support growth;

ii. The capacity for retail (convenience and comparison goods) floorspace in different locations and how any anticipated growth should be accommodated in accordance with the sequential approach and without adversely affecting the vitality and viability of existing centres, or whether (and where) contraction in retail floorspace should be planned;

iii. The planning strategy for accommodating commercial leisure and office needs;

iv. Advice on policies for change of use at ground floor level in the city and town centres and the flexibility for non-retail uses to encourage activity and dwell time; and

v. The scope for existing and/or former (vacant) retail floorspace to be 'released' for non-retail uses (including but not limited to residential) at ground floor level, with advice on the appropriateness of marketing and/or the period of vacancy required before such losses should be considered.

11.80 Our advice includes a critical review of the adopted LDP policies, namely Policies 10-13, in the light of the updated evidence and the new/emerging planning policy context in Scotland.

11.81 Policies 10 and 12 of the adopted LDP refer to the network and hierarchy of centres comprising the City, Town and Neighbourhood Centres. Policy recognises that the scale of retail development is a relevant and important consideration when assessing whether a proposal is commensurate with the role and function of the centre in the hierarchy (i.e. a proposal should result in *no change to the role or function of the centre in the network of centres [and] be of an appropriate scale* as set out in Policy 12). For the new LDP this remains appropriate and consistent with national planning policy. Although we assess there is unlikely to be much pressure for 'large scale' retail and other commercial development, due to market factors and conditions (the main potential exception being continued demand for discount foodstores and non-food stores), it will remain important to protect the network of centres and their future vitality and viability. This is considered later in relation to the sequential and impact tests and the need for robust assessment of retail and leisure development proposals outside the existing centres.

11.82 In terms of the appropriateness of the existing hierarchy of centres in the Perth and Kinross area, based on the updated evidence it remains appropriate to:

- define Perth City Centre at the apex of the hierarchy, reflecting its role as a sub-regional centre and principal focus for comparison goods shopping, services, offices, leisure and other commercial activity in the Perth and Kinross area;

- define the existing Town Centres of Aberfeldy, Alyth, Auchterarder, Blairgowrie, Coupar Angus, Crieff, Dunkeld & Birnam, Kinross and Pitlochry as 'second-tier' centres in the hierarchy. Although these centres differ in terms of their size and diversity of uses, they each (to varying degrees) provide an important local function serving the basic needs of residents and other users. However, as commented previously, Coupar Angus is the one centre where it may be appropriate to redefine as a neighbourhood centre; and

- define Neighbourhood Centres as 'third-tier' centres in the hierarchy recognising their small scale and predominantly walk-in catchments.

11.83 Regarding the capacity for retail floorspace, this Study has identified an overall over-supply of both convenience and comparison goods in the Perth and Kinross area from 2027 onwards. As such, there should be no requirement to plan for new retail development. The amount of surplus retail floorspace forecasted is particularly acute in Perth City Centre (i.e. about -1,500 sqm convenience goods net sales area and about -1,950 sqm comparison goods net sales area in 2027) and this is <u>additional</u> to the centre's vacancies which, in floorspace terms, stand at circa 14% according to Experian Goad. The outlook for the nine town centres in terms of quantitative capacity is generally less 'negative' or more settled. However, whilst these smaller centres will be less exposed to multiple retailer downsizing than the City Centre, they will not be immune to structural changes in the retail sector which are impacting on demand and the viability of some businesses.

11.84 This points to the need for a policy response that can manage the likely contraction of retail floorspace over the plan period and provide appropriate flexibility for non-retail uses, including but not limited to F&B, to come forward and address the qualitative needs for improvement identified for the area's centres in section 4. Such an approach is provided for in the Adopted NPF4 (e.g. Policy 27a supports a mix of uses to improve the vitality and viability of centres) and is further compatible with the potential changes to the Use Classes Order, which seek to bring together several existing use classes into a merged "general town centre use class" (potentially merging shops with services, food and drink uses, gyms, etc).

11.85 To that end, the appropriateness of restrictive 'retail to non-retail' change of use policies in the city and town centres has to be flagged as potentially detrimental. These could have unintended consequences and weaken the centres' ability to adapt, fill voids and diversify towards a broader range of uses to support their future vitality and viability. It is recommended there is greater emphasis at the plan-making (and decision-making) stage on qualitative-based assessment factors, focusing on (for example):

- the nature and character of the proposed use or development;

- the likely impact of a change of use proposal on the principles of 20-minute neighbourhoods (e.g. quality of life, access to services and facilities);

- the level of footfall associated with the proposal and its contribution to supporting other uses in the centre;

- its contribution to active street frontages; and

- its contribution to the overall health of the centre.

11.86 Any such policy response should be consistent with Adopted NPF4 where (at Policy 27c) it seeks to resist the over-concentration of 'bad neighbour' non-retail uses (which we note is also a consideration in respect of the merged "general town centre uses class" potentially being introduced).

11.87 Indeed, as an approach, Policy 11 of the adopted LDP, which specifically applies to the Perth City Centre Secondary Uses Area, is more flexible and aligned with the need to encourage a mix of appropriate uses (including non-retail uses) to support town centre vitality and viability. The policy promotes shops, residential, offices, cultural facilities (including theatres and other arts venues), restaurants, pubs and clubs. PKC should consider extending this type of policy approach – with the addition of qualitative-based assessment criteria as commented above – beyond the Secondary Uses Area <u>to the City Centre as a whole and the wider network of centres</u> in the hierarchy.

11.88 The Adopted NPF4, at Policy 27, requires local planning authorities to support and identify opportunities for town centre living – to include support for residential uses at ground floor level where it can be demonstrated that the proposal will:

- *retain an attractive and appropriate frontage;*
- *not adversely affect the vitality and viability of a shopping area or the wider centre; and*
- *not result in an undesirable concentration of uses, or 'dead frontages'.*

11.89 New opportunities for city and town centre living will generate population growth and thus additional spending to support local shops and other businesses, which is likely to be important for Perth City Centre in particular as it adapts to home and agile working trends. It remains to be seen, on a practical level, the extent to which the delivery of residential uses at ground floor level (e.g. within former shop units) will be feasible and/or attractive to private investors.

11.90 Nevertheless – and despite the pressures facing the retail and leisure sectors and the local office market – shopping and other commercial (and cultural) activities will remain a key driver of activity and underpin town centre vitality. Policy should therefore afford sufficient protection for such footfall-generating activities and allow for proper scrutiny of change of use proposals from town centre use(s) to ground floor residential. A minimum 12-month marketing period would be reasonable (mindful that too long a period could have unintended consequences and augment the issue of long-term vacancies) and suggest that PKC should consider applying this form of policy response as follows:

- for Perth City Centre – focused on a newly defined (e.g.) "central activities zone" (this could reflect the Policy 10 city centre 'core' boundary area shaded orange or wider area to be defined as part of the LDP review). Outwith that area, policy should provide greater flexibility for residential uses at ground floor level subject to meeting the criteria listed in Adopted NPF4 (Policy 27f). This approach recognises the scale of existing vacancies, the retail floorspace over-supply forecasted, and the flexible approach already set out in Policy 11 for the Secondary Uses Area;
- for the nine Town Centres – focused on the defined town centre boundaries (as existing or any revised boundaries to be defined for the LDP review).

11.91 The marketing evidence should demonstrate that the property has been proactively marketed for town centre use(s) at a reasonable price/rent without success for a minimum period of 12 months and that such uses are no longer viable.

11.92 Policy 13 of the adopted LDP sets out the 'town centres first' sequential approach for development proposals involving retail, commercial leisure and other *significant footfall* uses. No definition of *significant footfall* is provided. However, we note this wording is reflected in Adopted NPF4 (again without definition) which requires that the sequential approach should be applied to all development proposals *which will generate significant footfall, including commercial, leisure, offices, community, sport and cultural facilities, public buildings … and public spaces* i.e. without specific reference to retail.

11.93 With regards to the sequential approach for retail development proposals, Adopted NPF4 (Policy 28a) directs such proposals to existing centres, then to *edge-of-centre areas or in commercial centres if they are allocated as sites suitable for new retail development in the LDP*. The policy adds that retail development proposals *will not be supported in out of centre locations* unless they involve small scale neighbourhood retail development (Policy 28c) and/or ancillary retail in island and rural areas (Policy 28d).

11.94 This particular passage of the Adopted NPF4 (Policy 28a) gives rise to two important considerations for the LDP review process. Firstly, no definition of *edge-of-centre* is provided. We would therefore recommend that, in the interests of providing certainty to applicants and decision makers, edge-of-centre areas are defined in the new LDP as a location up to 300 metres from, and well connected to, the relevant city/town centre boundary[20].

11.95 Secondly – and most significantly – Policy 28a implies a moratorium on new retail development in out-of-centre locations (unless small scale neighbourhood retail development and/or ancillary retail in island and rural areas). This report is not the forum in which to debate or contest the appropriateness of such an approach outlined in national planning policy. However, we consider it is potentially open to challenge and recommend that PKC seeks further advice, in terms of the implications for the city/town centre and retail policies of the new LDP, once the position becomes clearer.

11.96 Indeed, there are some forms of retail development, including garden centres and potentially other large formats, which may not be appropriate for town centre locations. A reasonable degree of flexibility is needed when applying the sequential approach to new proposals of this nature, recognising their particular space and operational requirements.

11.97 Policy 28 does not include a definition of *small scale neighbourhood retail development*. Accordingly, we would recommend the new LDP defines such development as comprising no more than 500 sqm gross in total, with individual retail units measuring no more than 200 sqm gross. These controls will ensure development principally serves local retail needs and is consistent with the principles of 20-minute neighbourhoods. The overall total of 500 sqm gross is further aligned with our recommended floorspace threshold for impact testing (as considered below).

11.98 Policy 13 of the adopted LDP further requires an impact assessment for retail and leisure development proposals of 1,500 sqm gross or more (the SPP sets a default floorspace threshold of 2,500 sqm gross) which are outside a defined town centre boundary and not in accordance with the development plan. Adopted NPF4 does not identify a floorspace threshold, instead (at Policy 27b) referring broadly to development *which will generate significant footfall* without defining this in quantitative terms as mentioned previously.

11.99 It is recommended that PKC set its own floorspace threshold to ensure the local planning authority can assess and control the impact of proposed new retail and leisure development outside the existing centres (including changes of uses and applications to extend existing facilities). However, the current 1,500 sqm gross threshold is potentially too high, not least because this scale of development would far exceed the retail capacity forecasts identified in this Study. This floorspace threshold is also substantial in relation to the smaller Town Centres and Neighbourhood Centres, where competing new development much smaller than 1,500 sqm gross could potentially have an adverse impact on their vitality and viability.

11.100 It is therefore recommended that a lower threshold of 500 sqm gross for impact testing would be appropriate in relation to retail and leisure development proposals across Perth and Kinross.

11.101 If this approach to locally set floorspace thresholds (for the purpose of impact testing) is followed as part of the Local Plan review process, then policy should acknowledge that impact assessments should be proportionate to the scale and nature of retail and/or leisure development proposed; and draw on existing information where possible including the findings of this up-to-date evidence base (or any subsequent updates). There is merit in PKC also considering the need for a (e.g.) “specification for impact assessments” to sit alongside policy to ensure that impact (and sequential) assessments submitted with planning applications are scoped and prepared in a way that is consistent with good retail planning practice and allows the local planning authority to make a robust assessment.

Future Performance Monitoring

11.102 It will be important to keep under review the performance of the city and town centres in the Perth and Kinross area. Their health and performance can and will change in the months and years ahead given the continued pace of change in the retail and leisure markets, changing consumer behaviours and working habits, and macro-economic pressures resulting from the cost of living crisis and a likely long-lasting recession.

[20] This broadly reflects the definition of ‘edge-of-centre’ set out in the National Planning Policy Framework for England (Annex 2: Glossary) published in July 2021.

11.103 The evidence and analysis set out in this Study provides a framework for the regular performance monitoring of the city and town centres. It allows for updated and/or third party information to be 'added in' so as to develop the evidence base further. This can also include the addition of / comparison to wider performance data, mobile monitoring for pedestrian movement, credit card / loyalty card activity and other information that the Council and its partners may have access to. To enable a strong comparable and benchmarked data set, it will be necessary to compare any wider data sets to that of the Study findings within 6 months of completing this Study, or after any interim updates of information already included in the Study scope of research.

11.104 With this in mind, the project team has started to map out the content for a *Perth Data Dashboard*. This will provide a snapshot of the key statistics identified in the Study, and allow for wider data sources (such as credit card expenditure, loyalty card usage and car park, transport and future customer satisfaction survey findings) to be included. This will enable a variety of Council teams and departments to use the information to help direct wider Council activity and initiatives. This would serve to further extend the benefit of the Study and the lifespan of the report and statistics. A preliminary Perth Data Dashboard is included at the end of this section. The Dashboard model can be extended to cover the rural centres, subject to the range of information available from this Study and any third party data sources / providers.

11.105 To inform this Study, business interview surveys in each of the centres have been designed and undertaken, and a new household telephone survey of catchment area residents. The latter survey has been designed in such a way to allow for comparison with the results of the 2016 Study[21]. The tables included at Appendix A and B of this report provide the main findings. These establish a 'dashboard' of performance indicators based on the views and ideas of businesses (in 2022) and residents/customers (in 2022 plus 2016 insofar as available) which can be easily updated in future.

11.106 The business survey is already updated on an annual basis for Perth City Centre, and it is recommended this continue and possibly be extended to the larger town centres as annual surveys and smaller town centres as bi-annual or tri-annual surveys. This will provide worthwhile ongoing updates for the performance dashboard and also assist with monitoring of the impact and benefit of interventions.

11.107 The detailed findings and observations set out in the city and town centre healthchecks at section 4 of this report provide a further series of 'baseline' Key Performance Indicators (KPIs) which can be measured, and responded to, over time.

11.108 The findings of this Study as regards shopping patterns (or market shares), retail floorspace capacity and leisure-trip habits/needs can also be kept under review and updated in future. This can be undertaken without any requirement for new household survey research over the next five years.

11.109 To that end, the retail capacity model used for this Study is designed to enable the principal data inputs and assumptions to be reviewed and updated at regular intervals, accounting for the latest available data such as population estimates and projections; per capita expenditure projections; allowances for Special Forms of Trading including online sales; and/or changes in retail floorspace supply as a result of committed or new development. It is also possible (and a defendable approach) to adjust the survey-indicated market shares to account for new retail development and/or key store closures, and the likely implications for town centre turnover and floorspace needs. Beyond the next five years, however, the ability to rely on the 2022 survey-indicated market shares is less certain and it may be necessary to commission updated household survey research.

11.110 In the near-term, it is strongly recommended that PKC commissions on-street visitor surveys to provide an important additional input to performance analysis and catchment definition. This would be particularly necessary with regards to the smaller town centres which achieved a limited sample size in the 2022 household survey research, yet would help to inform strategies for planning, placemaking and marketing for all centres in the Perth and Kinross area. The on-street visitor surveys would supplement the performance monitoring data dashboard and could include questions relating to visit of frequency, dwell time, mode of travel, facilities used, estimated spend by goods / service category, core visit drivers, main likes, and areas for improvement to increase visits. Most importantly of all, it probes and surveys

[21] Although it is noted that the town centres of Alyth, Coupar Angus and Dunkeld & Birnam were not previously assessed.

actual shoppers, visitors and users of any given centre; a very important customer group to retain and grow.

Perth Data Dashboard: Indicative KPI Measures

Mix and Offer	
Comparison Units	115
Catering	70
Services	70
Leisure	7
Convenience	35
Vacant	75
Recent Openings (last 3 months)	TBA
Recent Closures (last 3 months)	TBA
Customer Activity	
Travel Method - Car	75%
Dominant dwell time 1-2 hours	46%
Visit frequency - weekly	54%
Spend (shopper survey / card data)	TBA
Visit Trend up, down, same	TBA
Footfall - monthly	245,000
Footfall - peak day in month	13,000
Footfall trend	-10.7%
Transport / Travel	
Total parking spaces	TBC
Car park occupancy	TBC
Bus passenger volumes (month)	TBC
Other Data Options	
Housing growth	TBC
Population growth	TBC
Employment growth	TBC
Visitor numbers and trend	TBC
Crime and safety	TBC

Business Performance	
Business satisfaction (Yes : No)	53% : 19%
Business Outlook (Good : Poor)	56% : 39%
Business intention Remain	77%
Business intention Adapt	17%
Business intention Close	7%
Customer numbers same / up	26%
Customer numbers down	68%
Trading compared to pre Covid	23% up
Trading compared to pre Covid	60% down
Planned Capacity	
Convenience growth opportunity	Nil quant
	Limited qual
Comparison growth opportunity	Nil quant
	Limited qual
F&B growth opportunity	Qual growth
Leisure growth opportunity	Qual growth
Card Data Information	
Average spend retail	TBC
Average spend F&B	TBC
Average spend leisure	TBC
Dwell time	TBC
Travel distance	TBC
Catchment population	TBC

Appendix A

Business survey summary tables

Perth Retail Study 2022 Business Survey Summary Results		Perth City Centre	Aberfeldy Town Centre	Alyth Town Centre	Auchterarder Town Centre	Blairgowrie Town Centre	Coupar Angus Town Centre	Crieff Town Centre	Dunkeld Town Centre	Kinross Town Centre	Pitlochry Town Centre
	Response dataset	147	23	5	23	40	3	48	21	15	28
4. Which of the following best describe your customers?	4										
	local residents	93%	91%	100%	96%	95%	67%	100%	67%	100%	71%
	local workers	69%	52%	80%	61%	58%	33%	48%	33%	40%	43%
	tourists /visitors	62%	70%	100%	87%	75%	0%	81%	100%	67%	93%
	leisure users	13%	22%	20%	9%	10%	33%	10%	29%	13%	7%
	students	46%	13%	0%	26%	25%	0%	23%	19%	13%	7%
	people passing through	61%	61%	100%	61%	65%	33%	56%	67%	47%	64%
	Fashion oriented	22%	0%	0%	26%	13%	0%	4%	5%	0%	4%
	Affluent	28%	30%	20%	39%	28%	0%	31%	52%	13%	18%
	Comfortable	41%	30%	40%	43%	38%	0%	38%	43%	20%	29%
	On a budget	46%	26%	40%	26%	48%	33%	38%	19%	20%	25%
	Aspirational	14%	9%	0%	9%	5%	0%	4%	24%	0%	4%
	Value seekers	29%	17%	40%	9%	28%	0%	19%	14%	0%	7%
	Brand Conscious	29%	9%	20%	22%	25%	0%	13%	10%	7%	7%
5. How long has your business been trading here?	5										
	Less than a year	7%	4%	20%	9%	8%	0%	4%	14%	0%	11%
	1-5 years	23%	22%	20%	17%	23%	0%	25%	29%	40%	14%
	6-10 years	16%	35%	20%	22%	8%	0%	13%	14%	7%	18%
	Over 10 years	53%	39%	40%	57%	63%	100%	58%	43%	53%	61%
6. Roughly what percentage of your turnover relates to spending by visitors?	6										
	0>10%		22%	20%	17%	35%	67%	29%	0%	40%	4%
	21>30%		22%	40%	13%	8%	33%	10%	0%	7%	0%
	41>50%		17%	20%	4%	5%	0%	8%	14%	0%	7%
	11>20%		4%	20%	4%	13%	0%	4%	5%	13%	0%
	31>40%		13%	0%	17%	10%	0%	4%	5%	13%	4%
	51% +		13%	0%	9%	8%	0%	8%	57%	13%	54%
	Don't know		4%	0%	26%	20%	0%	27%	14%	13%	29%
7. How are you currently trading compared to pre Covid pandemic levels?	7										
	Down > 20%	12%	35%	20%	22%	10%	0%	19%	5%	7%	14%
	Down 10% - 20%	24%	4%	20%	13%	18%	0%	19%	5%	7%	4%
	Down < 10%	22%	0%	0%	9%	13%	0%	4%	14%	20%	4%
	Level	13%	22%	0%	9%	30%	100%	19%	38%	27%	18%
	Up < 5%	3%	22%	0%	0%	5%	0%	4%	5%	7%	7%
	Up 5% - 15%	4%	4%	40%	30%	5%	0%	6%	14%	20%	7%
	Up > 15%	3%	9%	0%	4%	5%	0%	13%	5%	7%	18%
	No Answer	18%	4%	20%	13%	15%	0%	17%	14%	7%	29%
8. How satisfied are you with overall performance of your store / business?	8										
	Very satisfied	7%	17%	40%	17%	13%	0%	35%	10%	20%	29%
	satisfied	52%	39%	20%	57%	63%	100%	42%	62%	47%	46%
	neither/ nor	18%	39%	40%	9%	25%	0%	6%	19%	13%	14%
	Dissatisfied	16%	4%	0%	17%	3%	0%	15%	5%	7%	11%
	Very disssatisfied	3%	0%	0%	0%	0%	0%	2%	0%	0%	0%
9. How satisfied are you with this centre as a trading location?	Very satisfied	5%	26%	20%	17%	8%	0%	29%	19%	20%	32%
	satisfied	35%	39%	0%	52%	60%	100%	44%	71%	53%	43%
	neither/ nor	24%	26%	60%	22%	28%	0%	8%	5%	7%	18%
	Dissatisfied	22%	9%	0%	4%	8%	0%	15%	0%	7%	7%
	Very disssatisfied	10%	0%	0%	0%	0%	0%	4%	0%	7%	0%
10. Over the next 2 years do you think business performance in the city centre will?	10	* one year									
	Improve	27%	30%	20%	35%	23%	0%	40%	62%	27%	36%
	Decline	39%	26%	60%	13%	38%	0%	15%	0%	27%	18%
	Stay the same	29%	43%	20%	48%	33%	100%	42%	38%	40%	36%
	No answer	5%	0%	0%	4%	8%	0%	4%	0%	7%	11%
11. What are your company's future plans for ongoing trading in this centre?	11										
	Expand range of merchandise offered		13%	20%	22%	20%	33%	29%	33%	13%	39%
	Reduce the range of merchandise offered		4%	0%	4%	5%	0%	10%	0%	0%	0%
	Add more services		9%	0%	22%	10%	0%	23%	19%	7%	11%
	Remain in current premises	86%	70%	40%	57%	73%	67%	65%	67%	80%	64%
	Expand	5%	9%	20%	9%	3%	0%	8%	14%	7%	25%
	Move / Relocate within this centre	2%	9%	0%	13%	3%	0%	6%	10%	0%	11%
	Move / Relocate away from this centre	1%	4%	0%	4%	3%	0%	4%	0%	0%	0%
	Close	3%	9%	0%	4%	8%	0%	2%	0%	7%	0%
	No answer	5%	4%	20%	0%	8%	0%	2%	0%	7%	7%
12. How would you like the mix and offer in this centre to improve? (tick all that apply)	12										
	More multiple operators	54%	4%	0%	13%	13%	0%	6%	10%	0%	4%
	More independent shops	55%	48%	80%	39%	48%	67%	67%	38%	60%	64%
	More shops overall	73%	13%	40%	35%	53%	33%	35%	14%	27%	36%
	More cafes and restaurants	15%	13%	0%	17%	18%	33%	17%	5%	0%	7%
	More pubs and bars	12%	9%	20%	9%	10%	0%	10%	14%	7%	0%
	More / better markets	30%	26%	0%	9%	28%	0%	15%	33%	13%	11%
	More cultural attractions	39%	35%	20%	22%	43%	67%	38%	52%	13%	39%
	More / better leisure facilities	34%	39%	20%	26%	45%	33%	29%	29%	33%	54%
	More / better events	40%	35%	0%	26%	38%	0%	44%	48%	40%	39%
	More visitor accommodation		13%	0%	13%	38%	67%	33%	14%	7%	14%
	Other? Please state		4%	0%	0%	0%	0%	0%	0%	7%	0%
would you like the customer experience of this centre to be improved? (tick all that apply)	13										
	Better lighting	47%	9%	0%	13%	13%	0%	13%	5%	7%	11%
	Improved signage	36%	9%	40%	22%	25%	0%	23%	38%	27%	39%
	Improved pavements	38%	35%	0%	17%	18%	33%	52%	14%	33%	36%
	Better access to shops		13%	40%	22%	20%	0%	17%	33%	27%	14%
	More customer toilets		70%	60%	26%	40%	33%	56%	33%	53%	79%
	Better sense of arrival		9%	0%	9%	20%	33%	25%	5%	20%	21%
	Improved safety and security	65%	4%	0%	0%	20%	0%	13%	5%	13%	7%
	More public art		9%	0%	4%	13%	0%	23%	14%	13%	18%
	Cleaner / tidier	39%	35%	60%	13%	30%	0%	54%	10%	27%	14%
	More customer seating		9%	20%	9%	8%	0%	15%	5%	33%	11%
	More trees / green space	37%	13%	0%	17%	10%	33%	27%	5%	33%	18%
	Public realm improvements		4%	0%	4%	3%	33%	17%	5%	0%	7%
	Improved parking facilities	67%	74%	40%	91%	75%	67%	58%	81%	60%	57%
	More / better CCTV		26%	20%	43%	50%	0%	50%	19%	33%	11%
	Better traffic management		30%	0%	22%	43%	33%	42%	67%	27%	46%
	More focus on heritage		9%	0%	0%	20%	33%	17%	5%	20%	18%
	Improved facilities for cyclists		22%	20%	0%	23%	33%	21%	24%	20%	21%
	Improved facilities for walkers		17%	20%	0%	15%	33%	15%	29%	20%	18%
	Other? Please state		0%	0%	0%	0%	0%	0%	0%	0%	0%
14. Please rate how strongly you agree or dissagree with the following statements?	14										
I am happy to recommend this centre as a place to trade	Strongly Agree	4%	39%	20%	39%	20%	0%	19%	48%	20%	25%
	Agree	24%	30%	40%	48%	63%	33%	60%	48%	53%	64%
	Neither Nor	34%	17%	20%	4%	15%	0%	10%	5%	13%	4%
	Dissagree	21%	4%	0%	4%	3%	33%	6%	0%	7%	0%
	Strongly Dissagree	12%	0%	0%	4%	0%	0%	2%	0%	0%	0%
	No answer	5%	9%	20%	0%	0%	33%	2%	0%	7%	7%
I am concerned about the future trading prospects in this centre	Strongly Agree		22%	40%	9%	25%	0%	17%	5%	13%	14%
	Agree		17%	20%	43%	30%	33%	40%	43%	20%	21%
	Neither Nor		39%	20%	9%	30%	33%	23%	14%	40%	21%
	Dissagree		9%	0%	26%	5%	0%	13%	29%	7%	29%
	Strongly Dissagree		4%	20%	4%	0%	0%	4%	10%	7%	7%
	No answer		9%	0%	9%	10%	33%	4%	0%	13%	7%
This centre needs to be more family friendly	Strongly Agree		4%	0%	4%	10%	0%	15%	0%	13%	4%
	Agree		26%	0%	17%	33%	67%	23%	14%	33%	18%
	Neither Nor		52%	20%	52%	40%	0%	42%	43%	27%	54%
	Dissagree		4%	40%	13%	3%	0%	15%	33%	13%	18%
	Strongly Dissagree		4%	20%	4%	0%	0%	2%	10%	0%	4%
	No answer		9%	20%	9%	15%	33%	4%	0%	13%	4%
Tourists and visitors are important for the centre	Strongly Agree		70%	60%	61%	60%	0%	71%	76%	47%	75%
	Agree		17%	40%	30%	35%	67%	27%	19%	33%	21%
	Neither Nor		4%	0%	4%	0%	0%	0%	5%	7%	0%
	Dissagree		0%	0%	0%	0%	33%	0%	0%	0%	0%
	Strongly Dissagree		0%	0%	0%	0%	0%	0%	0%	0%	0%
	No answer		9%	0%	4%	5%	0%	2%	0%	13%	4%
END											

Appendix B

Household survey summary tables

Catchment 'home' zone:	zone 1	zone 2	zone 3	zone 3	zone 4	zone 4	zone 5

Average frequency of visits	Perth CC	Kinross TC	Auchterarder TC	Crieff TC	Aberfeldy TC	Pitlochry TC	Blairgowrie TC
	2022	2022	2022	2022	2022	2022	2022
Daily	8%	16%	6%	1%	11%	13%	6%
4-6 times a week	7%	7%	3%	4%	2%	3%	1%
2-3 times a week	17%	9%	13%	6%	13%	11%	14%
Weekly	22%	16%	7%	15%	4%	19%	12%
2-3 times a month	15%	2%	2%	7%	4%	6%	4%
Once a month	17%	7%	7%	8%	11%	12%	11%
Less often	12%	10%	16%	23%	22%	13%	33%
Never	3%	34%	45%	35%	33%	23%	19%

Sample (2022):	425	22	21	44	30	50	76

Frequency of visits post-Covid	Perth CC	Kinross TC	Auchterarder TC	Crieff TC	Aberfeldy TC	Pitlochry TC	Blairgowrie TC
	2022	2022	2022	2022	2022	2022	2022
More often	4%	3%	12%	10%	21%	8%	30%
About the same	53%	81%	83%	61%	64%	52%	51%
Less often	41%	16%	5%	30%	15%	40%	17%

Normal mode of travel	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Car / van (as driver)	54%	65%	62%	64%	50%	49%	42%	74%	42%	68%	58%	58%	69%	71%
Car / van (as passenger)	6%	10%	0%	1%	2%	10%	2%	2%	0%	3%	4%	18%	4%	2%
Bus, minibus or coach	21%	11%	0%	1%	0%	2%	19%	3%	1%	0%	3%	11%	6%	7%
Train		0.1%		0%		0%		0%		0%		0%		0%
Walk	13%	11%	38%	28%	37%	39%	37%	20%	57%	29%	33%	12%	21%	16%
Bicycle		0.5%		6%		0%		0%		0%		0%		0%
Other		0.4%		0%		0%		1%		0%		1%		3%
(Don't know / varies)	6%	2%	0%	0%	10%	0%	0%	0%	0%	0%	1%	0%	1%	0%

Dwell time	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Less than 30 mins	5%	3%	40%	9%	38%	33%	21%	9%	35%	18%	11%	28%	11%	7%
30 - 59 mins	15%	14%	36%	4%	26%	36%	36%	20%	12%	18%	17%	23%	26%	26%
1 hr - 1 hr 59 mins	33%	46%	16%	62%	22%	29%	14%	50%	21%	30%	50%	28%	28%	41%
2 hr - 2 hr 59 mins	31%	25%	3%	13%	0%	0%	13%	6%	10%	14%	5%	11%	12%	18%
3 hr - 3 hr 59 mins	5%	5%	0%	0%	3%	0%	7%	0%	10%	0%	1%	2%	4%	1%
4 hours or more	4%	5%	1%	6%	1%	0%	6%	9%	2%	12%	10%	0%	6%	3%
(Don't know / varies)	6%	2%	4%	5%	9%	2%	2%	7%	10%	7%	5%	7%	14%	2%

Main reasons for visiting (top 5 responses)	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Food shopping		50%	36%	60%	47%	65%	22%	46%	73%	75%	39%	77%	25%	83%
Non-food shopping	16%	53%	16%	15%	13%	12%	17%	45%	32%	57%	20%	22%		74%
Shopping generally	43%		31%		29%		51%		20%		18%		50%	
Visit cafes / restaurants	27%	39%				20%		29%		22%		28%	11%	25%
Visit pubs									17%					
Visit financial services	11%	10%	20%	35%				12%	17%					11%
Visit health services				27%		27%				24%		15%		7%
Visit other services			15%				14%							
Post Office														
Walk / walk the dog														
Window shopping / browse	24%	13%			10%						19%		12%	
Work / study						12%	19%	11%			20%	12%	12%	
Meet family / friends					13%									
Gym / swimming / leisure centre										17%				
Takeaways / fast food				15%										

Main likes (top 5 responses)	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Attractive environment	7%	11%	5%		8%	17%	15%	13%	52%	17%	24%	20%	10%	
Clean / well maintained streets														
Close to home / convenient	22%	21%	37%		45%	27%	26%	36%	18%	46%	20%	36%	43%	28%
Close to friends / relatives				12%										
Friendly atmosphere				12%	11%		14%		17%	19%	15%	13%	11%	
Good cafes / restaurants	8%	9%		8%				8%				5%		
Good pubs														
Good range of other services														
Good food shops and stores														14%
Good non-food shops								12%						19%
Good independent shops			6%		11%	22%	12%			15%				
Good shops generally									11%		6%			
Good layout / easy to get around	8%	8%	8%										7%	
Quiet / not too busy				16%										

Meets all needs						13%				7%				20%
Easy to get to by car				13%										
Nothing in particular	34%	22%	39%		19%	25%	22%	22%	13%		30%	27%	19%	13%

Suggested improvements (top 5 responses)	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
More / better food shops				13%	11%	62%	13%		5%	12%		19%	8%	
More / better clothes shops	12%	10%	9%						2%					
More independent / specialist shops	10%	12%	7%							13%		11%		6%
More 'high street' retailers		17%										7%		
More / better shops generally	40%	22%	40%	8%	4%		43%	24%	11%		28%	22%	22%	10%
Less empty shops		11%						11%						
More larger stores											6%		4%	
More / better financial services				22%										
More leisure facilities					8%									
Cleaner streets							11%							
Update / refurbish it								14%						
More pedestrianised streets											5%			
More / better seating						10%								
More / cheaper parking	15%		23%		44%		17%		13%		10%		13%	
Easier to park				16%		46%		12%		26%				9%
Cheaper (or free) to park						16%								
Better public transport										7%				6%
Nothing in particular	12%		20%	15%	21%	9%	13%	24%	47%	53%	33%	48%	40%	53%

Frequency of evening visits	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Daily	0%	9%	0%	0%	4%	0%	0%	0%	0%	0%	1%	0%	1%	0%
2-6 times a week	2%	14%	4%	71%	15%	0%	8%	4%	8%	2%	8%	11%	10%	7%
Weekly	7%	3%	9%	0%	5%	5%	9%	6%	33%	11%	22%	2%	13%	2%
2-3 times a month	7%	6%	14%	0%	6%	7%	11%	0%	8%	12%	4%	2%	6%	3%
Once a month	12%	4%	9%	0%	11%	32%	13%	12%	11%	7%	9%	7%	12%	3%
Less often	23%	24%	10%	14%	7%	2%	19%	18%	12%	6%	19%	7%	12%	13%
Never	46%	39%	51%	15%	45%	49%	40%	60%	25%	63%	32%	71%	47%	70%

Main reasons for evening visits (top 5 responses)	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Cafes / restaurants	58%	42%	61%	22%	39%	51%	63%	47%	39%	37%	33%	40%	58%	53%
Pubs / bars	32%	25%	21%	21%	20%	39%	26%	14%	41%	34%	31%		42%	21%
Cinema		13%								63%				
Theatre / shows		15%												6%
Cinema or theatre	34%										10%			
Attending events	21%						13%		7%				12%	
Gym / swimming / ice sports	10%		8%		10%			10%			13%	12%		24%
Meeting family / friends		11%		22%		5%	10%	6%		15%				
Community hall activities / meetings			8%											
Go for a walk					16%	24%			53%		14%		7%	
Takeaways / fast food			9%	43%		10%	16%	23%		5%		13%		6%
To use services														
Food shopping												13%		
Non-food shopping												21%		
Late shopping (when open)					20%				12%				13%	

Evening improvements (top 5 responses)	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Better cafes / restaurants / pubs	9%	12%	6%		7%	24%	16%	26%		24%	10%	9%	12%	2%
More live music / performances	6%	5%	4%										6%	2%
More outdoor events		3%											5%	
More leisure facilities	4%				12%								5%	
More attractive environment		3%												
Improved safety & security								14%	3%					
Shops / pubs / venues open later	4%						4%	14%						
Lower prices in pubs & restaurants												9%		
Better 'late' public transport services				14%								4%		4%
Easier to park						5%								
Cinema / better cinema experience				62%			10%	12%				4%		
More for families to do						15%								
Nothing in particular	60%	42%	81%	15%	71%	52%	60%	34%	91%	72%	82%	83%	61%	87%

Sample (2022): 425 | 22 | 21 | 44 | 30 | 50 | 76

Range and choice of shops	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Good	12%	7%	8%	19%	43%	66%	8%	17%	45%	46%	32%	7%	15%	43%
Average	44%	51%	33%	78%	32%	17%	42%	52%	34%	32%	34%	52%	50%	43%
Poor	43%	41%	58%	3%	24%	18%	50%	30%	21%	22%	29%	41%	33%	14%
(Don't know)	2%	1%	1%	0%	1%	0%	0%	1%	0%	0%	4%	0%	2%	0%

Quality of shops	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Good	28%	20%	25%	24%	67%	80%	25%	34%	64%	49%	39%	43%	35%	62%
Average	47%	61%	44%	69%	20%	10%	65%	47%	35%	45%	44%	44%	47%	30%
Poor	23%	18%	31%	7%	12%	10%	9%	17%	1%	2%	14%	10%	17%	8%
(Don't know)	2%	2%	1%	0%	1%	0%	0%	2%	0%	3%	3%	3%	1%	1%

Town centre environment	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Good	37%	22%	42%	18%	52%	70%	18%	20%	62%	72%	58%	45%	53%	67%
Average	38%	52%	34%	75%	37%	24%	52%	45%	30%	28%	28%	39%	38%	29%
Poor	23%	25%	24%	7%	10%	5%	30%	32%	8%	0%	10%	8%	8%	4%
(Don't know)	2%	1%	1%	0%	1%	0%	0%	2%	0%	0%	4%	8%	1%	0%

Parking availability	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Good	24%	28%	18%	29%	23%	12%	14%	35%	26%	19%	21%	20%	29%	39%
Average	25%	47%	33%	52%	7%	5%	29%	36%	19%	38%	24%	33%	34%	32%
Poor	36%	16%	44%	18%	69%	75%	38%	29%	23%	35%	40%	32%	25%	20%
(Don't know)	15%	9%	4%	1%	1%	8%	18%	1%	31%	9%	14%	15%	12%	9%

Public transport	Perth CC		Kinross TC		Auchterarder TC		Crieff TC		Aberfeldy TC		Pitlochry TC		Blairgowrie TC	
	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022	2016	2022
Good		27%		1%		29%		25%		5%		16%		40%
Average		34%		61%		29%		24%		23%		13%		23%
Poor		17%		16%		5%		17%		37%		37%		6%
(Don't know)		22%		22%		37%		34%		34%		34%		30%

Appendix C

Retail capacity tables

Catchment Area Population and Expenditure

Table: **1**

CATCHMENT AREA POPULATION FORECASTS

Zone	Postcode Sectors	Base Year 2022	Forecasting Years 2027	2032	2037	BLANK
1	DD2 5; PH1 1, 2, 3, 4, 5; PH2 0, 6, 7, 8, 9; PH14 9	90,805	91,758	92,497	93,515	
2	KY4 0; KY5 0; KY6 3; KY13 0, 7, 8, 9; KY14 6, 7	39,913	40,276	40,594	41,073	
3	PH3 1; PH4 1; PH5 2; PH6 2; PH7 3, 4; FK15 0, 9; FK19 8; FK21 8	34,086	34,853	35,398	36,387	
4	PH8 0; PH9 0; PH15 2; PH16 5; PH17 2; PH18 5	12,451	12,753	12,940	13,266	
5	DD8 1; PH10 6, 7; PH11 8; PH12 8; PH13 9	28,557	28,868	29,056	29,406	
TOTAL		205,812	208,508	210,485	213,648	

Source:
Precisely 'GeoInsight' Report for the Catchment Area (August 2022).

Table: **2**

CATCHMENT AREA PER CAPITA EXPENDITURE

Price Basis: **2020** Prices

Catchment Zone	CONVENIENCE GOODS – Per Capita Expenditure Including Special Form of Trading – Base Year 2022	Forecasting Years 2027	2032	2037	BLANK	COMPARISON GOODS – Per Capita Expenditure Including Special Form of Trading – Base Year 2022	Forecasting Years 2027	2032	2037	BLANK
1	2,649	2,548	2,608	2,666		4,435	4,809	5,310	5,694	
2	2,479	2,385	2,441	2,497		4,084	4,430	4,891	5,243	
3	2,674	2,536	2,575	2,610		4,548	4,865	5,329	5,649	
4	2,783	2,639	2,684	2,723		4,629	4,949	5,428	5,761	
5	2,653	2,547	2,613	2,675		4,359	4,718	5,220	5,593	
Catchment Area Average	2,629	2,520	2,576	2,629		4,387	4,741	5,227	5,590	
Expenditure on Special Forms of Trading (%)*	7.0	7.5	8.0	8.5		22.5	25.0	27.5	29.0	

Catchment Zone	**Per Capita Expenditure EXCLUDING* Special Form of Trading** – Base Year 2022	Forecasting Years 2027	2032	2037	BLANK	**Per Capita Expenditure EXCLUDING* Special Form of Trading** – Base Year 2022	Forecasting Years 2027	2032	2037	BLANK
1	2,464	2,356	2,399	2,439		3,437	3,606	3,850	4,043	
2	2,306	2,206	2,246	2,284		3,165	3,322	3,546	3,722	
3	2,487	2,346	2,369	2,388		3,525	3,649	3,864	4,011	
4	2,588	2,441	2,469	2,492		3,587	3,712	3,935	4,091	
5	2,467	2,356	2,404	2,448		3,378	3,538	3,784	3,971	
Catchment Area Average	2,445	2,331	2,370	2,405		3,400	3,556	3,790	3,969	

Source: Precisely 'GeoInsight' Report for the Catchment Area (August 2022) for per capita expenditure. SFT deductions by CPW Planning based on forecasts by Oxford Economics (derived from the Retail Expenditure Guide 2021/22 published by Precisely) and Experian Retail Planner Briefing Note.

Table: **3**

CATCHMENT AREA EXPENDITURE FORECASTS

Catchment Zone	TOTAL RETAIL EXPENDITURE – CONVENIENCE GOODS 2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	COMPARISON GOODS 2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1	223,739	216,226	221,939	228,105		312,128	330,920	356,088	378,055	
2	92,020	88,851	91,181	93,825		126,339	133,814	143,944	152,882	
3	84,759	81,774	83,859	86,896		120,138	127,173	136,767	145,948	
4	32,226	31,136	31,947	33,053		44,664	47,336	50,924	54,265	
5	70,463	68,012	69,847	71,985		96,474	102,147	109,959	116,775	
TOTALS	503,206	485,998	498,772	513,863		699,742	741,389	797,682	847,925	

Source: Tables 1 and 2

Table: **4**

COMPARISON GOODS PER CAPITA EXPENDITURE BY GOODS TYPE

Per Capita Comparison Goods Expenditure in 2022 for the catchment area as a whole — **2020** Prices

	Clothing & footwear	Furniture & floor coverings	Household textiles	Domestic appliances	Audio-visual & computer equipment	DIY goods & decorating supplies	Chemist's goods, medical & beauty products	All other comparison goods	Total Comparison Goods
Including SFT (£)	1,125	307	121	187	665	197	636	1,149	4,387
Deduction for SFT (%)	26.5	17.0	20.0	28.0	25.0	9.5	14.0	24.9	22.5
Excluding SFT (£)	827	255	97	135	499	178	547	863	3,400

Source: Precisely 'GeoInsight' Report for the Catchment Area (August 2022) for per capita expenditure.
SFT deductions estimated by CPW Planning with regard to the Household Interview Survey 2022.

Table: **5**

CATCHMENT AREA COMPARISON GOODS EXPENDITURE BY GOODS TYPE IN 2022

Catchment Zone	Clothing & footwear (£000)	Furniture/ floor coverings (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemist, medical & beauty goods (£000)	All other comparison goods (£000)
1	75,911	23,393	8,887	12,361	45,788	16,367	50,214	79,217
2	30,726	9,469	3,597	5,003	18,533	6,625	20,325	32,064
3	29,218	9,004	3,420	4,758	17,624	6,300	19,327	30,490
4	10,862	3,347	1,272	1,769	6,552	2,342	7,185	11,335
5	23,463	7,230	2,747	3,820	14,152	5,059	15,520	24,485
TOTALS	170,181	52,443	19,923	27,711	102,649	36,693	112,571	177,591

Source: Tables 1 and 4

Scenario	1
Perth City Centre	

Table: **6**

CONVENIENCE GOODS MARKET SHARES IN 2022

2022 Perth City Centre			
Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	3.6	8.9	5.2
2	0.0	0.3	0.1
3	0.6	4.8	1.8
4	0.0	0.0	0.0
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **7**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

	2022 Allocations to Perth City Centre Indicated by Household Interview Survey								
	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
Zones	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	62.5	31.0	24.3	14.3	12.1	7.3	52.0	68.4	46.7
2	32.8	18.1	15.4	6.7	10.1	3.7	7.9	38.6	22.8
3	36.6	21.7	17.1	6.1	4.0	7.6	14.3	34.3	23.3
4	70.6	51.7	33.3	11.3	18.8	11.1	10.2	52.2	40.7
5	21.2	10.5	2.7	0.0	2.3	1.2	2.9	11.5	9.8

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: **8**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Perth City Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)
1	5	5	5	5		47	47	47	47	
2	0	0	0	0		23	23	23	23	
3	2	2	2	2		23	23	23	23	
4	0	0	0	0		41	41	41	41	
5	0	0	0	0		10	10	10	10	

Sources: Tables 6 and 7.

Table: **9**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	2022 Sales in **Perth City Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	47,467	7,252	2,159	1,773	5,531	1,192	26,111	54,152
2	10,066	1,718	553	334	1,877	245	1,598	12,361
3	10,706	1,957	583	290	705	479	2,756	10,458
4	7,669	1,730	424	200	1,232	261	731	5,917
5	4,981	756	75	0	331	58	442	2,816
TOTALS	80,889	13,412	3,794	2,596	9,676	2,234	31,638	85,704
MARKET SHARES	47.5%	25.6%	19.0%	9.4%	9.4%	6.1%	28.1%	48.3%

Table: **10**

FORECAST RETAIL SALES

Scenario: 1 Location: **Perth City Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	COMPARISON GOODS 2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1	11,187	10,811	11,097	11,405		146,700	155,533	167,362	177,686	
2	0	0	0	0		29,058	30,777	33,107	35,163	
3	1,695	1,635	1,677	1,738		27,632	29,250	31,456	33,568	
4	0	0	0	0		18,312	19,408	20,879	22,249	
5	0	0	0	0		9,647	10,215	10,996	11,677	
TOTALS	12,882	12,447	12,774	13,143		231,349	245,182	263,800	280,343	

Table: **11**

SALES CAPACITY OF EXISTING

MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Sainsbury's Local (High Street)	248	95	236	9,900	2,332
Tesco Express (South Street)	1,393	90	1,254	10,500	13,164
M&S Foodhall (High Street)	700	100	700	8,400	5,880
Other convenience goods shops and stores	1,937	90	1,743	5,000	8,717
ALL STORES	4,278		3,933	7,652	30,093

Sources: Experian Goad (May 2022). Perth & Kinross Town Centre and Retail Study 2016. CPW Planning.

Table: **12**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **13**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Perth City Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000	12,882	12,447	12,774	13,143		231,349	245,182	263,800	280,343	
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		5.0	5.0	5.0	5.0	
Total spending (£000)	13,269	12,820	13,157	13,537		242,917	257,441	276,990	294,360	
Existing shop floorspace (sq m net)	3,933	3,933	3,933	3,933		32,343	32,343	32,343	32,343	
Sales per sq m net (£)	3,374	7,652	7,652	7,652		7,511	8,292	9,155	10,108	
Sales from extg flrspce (£000)	13,269	30,093	30,093	30,093		242,917	268,200	296,114	326,934	
Available spending to support new shops (£000)	0	-17,273	-16,935	-16,555		0	-10,759	-19,124	-32,574	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-17,273	-16,935	-16,555		0	-10,759	-19,124	-32,574	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)	**0**	**-1,502**	**-1,473**	**-1,440**		**0**	**-1,949**	**-3,138**	**-4,841**	

Market Share of Catchment Area Expenditure	2.6%	2.6%	2.6%	2.6%		33.1%	33.1%	33.1%	33.1%	

Scenario 1

Kinross Town Centre

Table: **14**

CONVENIENCE GOODS MARKET SHARES IN 2022

2022

Kinross Town Centre

Zones	Main food	Top-up food	**WEIGHTED AVERAGE**
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	7.2	2.2
3	0.0	0.0	0.0
4	0.0	0.0	0.0
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **15**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

2022 Allocations to

Kinross Town Centre

Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
Zones	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.1
2	2.4	0.0	0.0	0.5	1.1	2.7	14.8	2.7	4.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: **16**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Kinross Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors:			
	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	100	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	2	2	2	2		4	4	4	4	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	

Sources: Tables 14 and 15.

Table: **17**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	2022 Sales in **Kinross Town Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	452	0
2	737	0	0	23	209	180	3,008	866
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
TOTALS	737	0	0	23	209	180	3,460	866
MARKET SHARES	0.4%	0.0%	0.0%	0.1%	0.2%	0.5%	3.1%	0.5%

Table: **18**

FORECAST RETAIL SALES

Scenario: 1 Location: **Kinross Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE: CONVENIENCE GOODS 2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	COMPARISON GOODS 2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	1,840	1,777	1,824	1,876		5,054	5,353	5,758	6,115	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	
TOTALS	1,840	1,777	1,824	1,876		5,054	5,353	5,758	6,115	

Table: 19

SALES CAPACITY OF EXISTING

MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Local convenience goods shops and stores	893	90	804	5,000	4,019
ALL STORES	893		804	5,000	4,019

Sources: Experian Goad (April 2021). CPW Planning.

Table: 20

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **21**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Kinross Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000	1,840	1,777	1,824	1,876		5,054	5,353	5,758	6,115	
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		-	-	-	-	
Total spending (£000)	1,896	1,830	1,878	1,933		5,054	5,353	5,758	6,115	
Existing shop floorspace (sq m net)	804	804	804	804		816	816	816	816	
Sales per sq m net (£)	2,359	5,000	5,000	5,000		6,193	6,837	7,549	8,335	
Sales from extg flrspce (£000)	1,896	4,019	4,019	4,019		5,054	5,580	6,160	6,801	
Available spending to support new shops (£000)	0	-2,188	-2,140	-2,086		0	-227	-402	-686	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-2,188	-2,140	-2,086		0	-227	-402	-686	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)	**0**	**-190**	**-186**	**-181**		**0**	**-41**	**-66**	**-102**	

Market Share of Catchment Area Expenditure	0.4%	0.4%	0.4%	0.4%		0.7%	0.7%	0.7%	0.7%	

Scenario 1

Auchterarder Town Centre

Table: 22

CONVENIENCE GOODS MARKET SHARES IN 2022

2022

Auchterarder Town Centre

Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.3	0.1
3	3.7	21.2	9.0
4	0.0	0.0	0.0
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: 23

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

2022 Allocations to
Auchterarder Town Centre
Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
Zones	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.2
2	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.1
3	2.4	4.0	0.5	1.5	0.0	3.8	17.7	3.5	4.9
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: **24**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Auchterarder Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors:
Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	9	9	9	9		5	5	5	5	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	

Sources: Tables 22 and 23.

Table: **25**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	2022 Sales in **Auchterarder Town Centre** By Comparison Goods Type.							
	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	582	0
2	0	0	0	0	0	0	144	0
3	701	360	17	71	0	238	3,413	1,067
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
TOTALS	701	360	17	71	0	238	4,140	1,067
MARKET SHARES	0.4%	0.7%	0.1%	0.3%	0.0%	0.6%	3.7%	0.6%

Table: **26**

FORECAST RETAIL SALES

Scenario: 1 Location: **Auchterarder Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	7,628	7,360	7,547	7,821		6,007	6,359	6,838	7,297	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	
TOTALS	7,628	7,360	7,547	7,821		6,007	6,359	6,838	7,297	

Table: **27**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (High Street)	507	95	482	9,200	4,431
Other convenience goods shops and stores	711	90	640	5,000	3,200
ALL STORES	1,218		1,122	6,804	7,631

Sources: Experian Goad (January 2022). Perth & Kinross Town Centre and Retail Study 2016. CPW Planning.

Table: **28**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **29**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Auchterarder Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000	7,628	7,360	7,547	7,821		6,007	6,359	6,838	7,297	
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		5.0	5.0	5.0	5.0	
Total spending (£000)	7,857	7,580	7,774	8,055		6,307	6,677	7,180	7,662	
Existing shop floorspace (sq m net)	1,122	1,122	1,122	1,122		2,710	2,710	2,710	2,710	
Sales per sq m net (£)	7,006	6,804	6,804	6,804		2,327	2,569	2,837	3,132	
Sales from extg flrspce (£000)	7,857	7,631	7,631	7,631		6,307	6,964	7,689	8,489	
Available spending to support new shops (£000)	0	-50	143	425		0	-287	-508	-826	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-50	143	425		0	-287	-508	-826	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)	**0**	**-4**	**12**	**37**		**0**	**-52**	**-83**	**-123**	

Market Share of Catchment Area Expenditure	1.5%	1.5%	1.5%	1.5%		0.9%	0.9%	0.9%	0.9%	

Scenario 1

Crieff Town Centre

Table: **30**

CONVENIENCE GOODS MARKET SHARES IN 2022

2022

Crieff Town Centre

Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	0.2	0.1
2	0.0	0.0	0.0
3	6.5	9.5	7.4
4	0.0	0.0	0.0
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **31**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

2022 Allocations to
Crieff Town Centre
Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
Zones	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	2.8	1.9	2.1	0.7	0.0	4.8	17.9	2.7	4.7
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: **32**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Crieff Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	7	7	7	7		5	5	5	5	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	

Sources: Tables 30 and 31.

Table: **33**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	2022 Sales in **Crieff Town Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	85	0
2	0	0	0	0	0	0	0	0
3	818	171	72	35	0	302	3,452	823
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0
TOTALS	818	171	72	35	0	302	3,537	823
MARKET SHARES	0.5%	0.3%	0.4%	0.1%	0.0%	0.8%	3.1%	0.5%

Table: **34**

FORECAST RETAIL SALES

Scenario: 1 Location: **Crieff Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	5,933	5,724	5,870	6,083		6,007	6,359	6,838	7,297	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		0	0	0	0	
TOTALS	5,933	5,724	5,870	6,083		6,007	6,359	6,838	7,297	

Table: 35

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (Town Green)	943	95	896	9,200	8,242
Other convenience goods shops and stores	1,808	90	1,627	5,000	8,136
ALL STORES	2,751		2,523	6,491	16,378

Sources: Experian Goad (January 2022). Perth & Kinross Town Centre and Retail Study 2016. CPW Planning.

Table: 36

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **37**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Crieff Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000	5,933	5,724	5,870	6,083		6,007	6,359	6,838	7,297	
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		3.0	3.0	3.0	3.0	
Total spending (£000)	6,111	5,896	6,046	6,265		6,187	6,549	7,043	7,516	
Existing shop floorspace (sq m net)	2,523	2,523	2,523	2,523		4,271	4,271	4,271	4,271	
Sales per sq m net (£)	2,422	6,491	6,491	6,491		1,448	1,599	1,766	1,949	
Sales from extg flrspce (£000)	6,111	16,378	16,378	16,378		6,187	6,831	7,542	8,327	
Available spending to support new shops (£000)	0	-10,482	-10,332	-10,113		0	-282	-499	-811	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-10,482	-10,332	-10,113		0	-282	-499	-811	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)	**0**	**-911**	**-898**	**-879**		**0**	**-51**	**-82**	**-120**	

Market Share of Catchment Area Expenditure	1.2%	1.2%	1.2%	1.2%		0.9%	0.9%	0.9%	0.9%	

Scenario	1
Alyth Town Centre	

Table: **38**

CONVENIENCE GOODS MARKET SHARES IN 2022

2022 Alyth Town Centre			
Zones	Main food	Top-up food	**WEIGHTED AVERAGE**
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	0.0	0.0	0.0
5	0.2	4.6	1.5

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **39**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

	2022 Allocations to **Alyth Town Centre** Indicated by Household Interview Survey								
	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
Zones	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.0	9.9	0.0	1.6

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: **40**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Alyth Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	2	2	2	2		2	2	2	2	

Sources: Tables 38 and 39.

Table: **41**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	2022 Sales in **Alyth Town Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	1,533	0
TOTALS	0	0	0	0	0	0	1,533	0
MARKET SHARES	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%

Table: **42**

FORECAST RETAIL SALES

Scenario: 1 Location: **Alyth Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	1,409	1,360	1,397	1,440		1,929	2,043	2,199	2,335	
TOTALS	1,409	1,360	1,397	1,440		1,929	2,043	2,199	2,335	

Table: 43

SALES CAPACITY OF EXISTING

MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (Market Square)	297	95	282	9,200	2,596
Premier (Commercial Street)	207	95	197	7,450	1,465
Other convenience goods shops and stores	108	98	106	5,000	529
ALL STORES	612		585	7,851	4,590

Sources: CPW Planning. The Retail Group. ProMap.

Table: 44

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: 45

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Alyth Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000	1,409	1,360	1,397	1,440		1,929	2,043	2,199	2,335	
Plus visitors' spending (%)	-	-	-	-		-	-	-	-	
Total spending (£000)	1,409	1,360	1,397	1,440		1,929	2,043	2,199	2,335	
Existing shop floorspace (sq m net)	585	585	585	585		308	308	308	308	
Sales per sq m net (£)	2,410	7,851	7,851	7,851		6,267	6,920	7,640	8,435	
Sales from extg flrspce (£000)	1,409	4,590	4,590	4,590		1,929	2,130	2,352	2,597	
Available spending to support new shops (£000)	0	-3,230	-3,193	-3,150		0	-87	-153	-261	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-3,230	-3,193	-3,150		0	-87	-153	-261	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)	**0**	**-281**	**-278**	**-274**		**0**	**-16**	**-25**	**-39**	

Market Share of Catchment Area Expenditure	0.3%	0.3%	0.3%	0.3%		0.3%	0.3%	0.3%	0.3%	

Scenario 1

Blairgowrie Town Centre

Table: **46**

CONVENIENCE GOODS MARKET SHARES IN 2022

2022

Blairgowrie Town Centre

Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.9	0.3	0.7
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	0.5	0.0	0.4
5	19.4	8.3	16.1

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **47**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

2022 Allocations to

Blairgowrie Town Centre

Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
Zones	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.2	0.9	0.3	0.2	2.9	3.5	1.4
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	2.4	0.7	3.3	0.9	0.0	0.0	1.2	0.8
5	3.6	15.9	8.3	30.8	13.0	22.3	31.1	18.2	16.2

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: **48**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Blairgowrie Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)
1	1	1	1	1		1	1	1	1	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		1	1	1	1	
5	16	16	16	16		16	16	16	16	

Sources: Tables 46 and 47.

Table: **49**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
	2022	Sales in	**Blairgowrie Town Centre**					
	By Comparison Goods Type.							
1	0	0	19	108	114	28	1,456	2,733
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	81	9	58	62	0	0	136
5	840	1,153	227	1,176	1,834	1,128	4,827	4,451
TOTALS	840	1,234	254	1,342	2,010	1,155	6,283	7,320
MARKET SHARES	0.5%	2.4%	1.3%	4.8%	2.0%	3.1%	5.6%	4.1%

Table: **50**

FORECAST RETAIL SALES

Scenario: 1 Location: **Blairgowrie Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1	2,237	2,162	2,219	2,281		3,121	3,309	3,561	3,781	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		447	473	509	543	
5	11,274	10,882	11,176	11,518		15,436	16,343	17,593	18,684	
TOTALS	13,511	13,044	13,395	13,799		19,004	20,126	21,664	23,007	

Table: 51

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Tesco Superstore (Welton Road)	2,285	80	1,828	10,500	19,194
Sainsbury's Local (High Street)	765	95	727	9,900	7,195
Other convenience goods shops and stores	1,850	90	1,665	5,000	8,325
ALL STORES	4,900		4,220	8,227	34,714

Sources: Experian Goad (December 2021). Perth & Kinross Town Centre and Retail Study 2016. CPW Planning.

Table: 52

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
ALL STORES	-		-		-

COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **53**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Blairgowrie Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000	13,511	13,044	13,395	13,799		19,004	20,126	21,664	23,007	
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		3.0	3.0	3.0	3.0	
Total spending (£000)	13,917	13,435	13,797	14,213		19,574	20,730	22,313	23,697	
Existing shop floorspace (sq m net)	4,220	4,220	4,220	4,220		7,977	7,977	7,977	7,977	
Sales per sq m net (£)	3,298	8,227	8,227	8,227		2,454	2,709	2,991	3,303	
Sales from extg flrspce (£000)	13,917	34,714	34,714	34,714		19,574	21,611	23,860	26,344	
Available spending to support new shops (£000)	0	-21,278	-20,917	-20,501		0	-881	-1,547	-2,647	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-21,278	-20,917	-20,501		0	-881	-1,547	-2,647	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)	**0**	**-1,850**	**-1,819**	**-1,783**		**0**	**-160**	**-254**	**-393**	

Market Share of Catchment Area Expenditure	2.7%	2.7%	2.7%	2.7%		2.7%	2.7%	2.7%	2.7%	

Scenario 1

Coupar Angus Town Centre

Table: 54

CONVENIENCE GOODS MARKET SHARES IN 2022

2022

Coupar Angus Town Centre

Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	0.0	0.0	0.0
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: 55

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

2022 Allocations to
Coupar Angus Town Centre
Indicated by Household Interview Survey

Zones	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	0.2
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.4	14.1	3.6	3.2

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: 56

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Coupar Angus Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors: Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	0	0	0	0		0	0	0	0	
5	0	0	0	0		3	3	3	3	

Sources: Tables 54 and 55.

Table: **57**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	2022 Sales in **Coupar Angus Town Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	598	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0
5	0	0	0	0	0	19	2,185	891
TOTALS	0	0	0	0	0	19	2,783	891
MARKET SHARES	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	2.5%	0.5%

Table: **58**

FORECAST RETAIL SALES

Scenario: 1 Location: **Coupar Angus Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE CONVENIENCE GOODS 2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	COMPARISON GOODS 2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1						0	0	0	0	
2			**BLANK**			0	0	0	0	
3			**(NO MARKET SHARE DATA)**			0	0	0	0	
4						0	0	0	0	
5						2,894	3,064	3,299	3,503	
TOTALS						2,894	3,064	3,299	3,503	

Table: 59

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Premier (George Street)	63	95	60	7,450	446
Scotmid Co-operative (George Street)	90	95	86	9,200	787
Other convenience goods shops and stores	63	98	62	5,000	309
ALL STORES	216		207	7,442	1,541

Sources: CPW Planning. The Retail Group. ProMap.

Table: 60

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **61**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Coupar Angus Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000						2,894	3,064	3,299	3,503	
Plus visitors' spending (%)						-	-	-	-	
Total spending (£000)						2,894	3,064	3,299	3,503	
Existing shop floorspace (sq m net)						281	281	281	281	
Sales per sq m net (£)						10,303	11,375	12,559	13,867	
Sales from extg flrspce (£000)						2,894	3,195	3,528	3,895	
Available spending to support new shops (£000)			**BLANK**			0	-131	-229	-392	
Less sales capacity of committed new floorspace (£000)						0	0	0	0	
Net available spending for new shops (£000)						0	-131	-229	-392	
Sales per sq m net in new shops (£)						5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)						**0**	**-24**	**-38**	**-58**	

Market Share of Catchment Area Expenditure						0.4%	0.4%	0.4%	0.4%	

Scenario 1

Dunkeld & Birnam Town Centre

Table: **62**

CONVENIENCE GOODS MARKET SHARES IN 2022

2022

Dunkeld & Birnam Town Centre

Zones	Main food	Top-up food	**WEIGHTED AVERAGE**
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	2.1	9.9	4.5
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **63**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

2022 Allocations to

Dunkeld & Birnam Town Centre

Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
Zones	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.9	0.0	0.7	0.0	0.0	0.5	12.6	3.5	3.2
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: **64**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Dunkeld & Birnam Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors:			
	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	100	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	4	4	4	4		3	3	3	3	
5	0	0	0	0		0	0	0	0	

Sources: Tables 62 and 63.

Table: **65**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	2022 Sales in **Dunkeld & Birnam Town Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	205	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	96	0	9	0	0	12	905	401
5	0	0	0	0	0	0	0	0
TOTALS	301	0	9	0	0	12	905	401
MARKET SHARES	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.2%

Table: **66**

FORECAST RETAIL SALES

Scenario: 1 Location: **Dunkeld & Birnam Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	1,289	1,245	1,278	1,322		1,340	1,420	1,528	1,628	
5	0	0	0	0		0	0	0	0	
TOTALS	1,289	1,245	1,278	1,322		1,340	1,420	1,528	1,628	

Table: **67**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (Bridge Street)	108	95	103	9,200	944
Other convenience goods shops and stores	405	98	397	5,000	1,985
ALL STORES	513		500	5,863	2,928

Sources: CPW Planning. The Retail Group. ProMap.

Table: **68**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **69**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Dunkeld & Birnam Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000	1,289	1,245	1,278	1,322		1,340	1,420	1,528	1,628	
Plus visitors' spending (%)	10.0	10.0	10.0	10.0		20.0	20.0	20.0	20.0	
Total spending (£000)	1,418	1,370	1,406	1,454		1,608	1,704	1,833	1,954	
Existing shop floorspace (sq m net)	500	500	500	500		464	464	464	464	
Sales per sq m net (£)	2,839	5,863	5,863	5,863		3,465	3,826	4,224	4,664	
Sales from extg flrspce (£000)	1,418	2,928	2,928	2,928		1,608	1,775	1,960	2,164	
Available spending to support new shops (£000)	0	-1,558	-1,523	-1,474		0	-71	-127	-210	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	-1,558	-1,523	-1,474		0	-71	-127	-210	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)	**0**	**-136**	**-132**	**-128**		**0**	**-13**	**-21**	**-31**	

Market Share of Catchment Area Expenditure	0.3%	0.3%	0.3%	0.3%		0.2%	0.2%	0.2%	0.2%	

Scenario	1
Aberfeldy Town Centre	

Table: **70**

CONVENIENCE GOODS MARKET SHARES IN 2022

2022

Aberfeldy Town Centre

Zones	Main food	Top-up food	**WEIGHTED AVERAGE**
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	23.1	20.0	22.2
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **71**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

2022 Allocations to
Aberfeldy Town Centre
Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	**WEIGHTED AVERAGE**
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
Zones	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	2.6	0.6	0.0	0.0	0.0	1.9	0.0	0.0	0.8
4	7.7	5.1	4.8	0.0	0.0	6.5	26.5	14.9	10.8
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: 72

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Aberfeldy Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors:			
	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	100	% of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		1	1	1	1	
4	22	22	22	22		11	11	11	11	
5	0	0	0	0		0	0	0	0	

Sources: Tables 70 and 71.

Table: **73**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
	2022	Sales in	**Aberfeldy Town Centre**					
	By Comparison Goods Type.							
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	763	51	0	0	0	120	0	0
4	841	171	61	0	0	151	1,902	1,691
5	0	0	0	0	0	0	0	0
TOTALS	1,603	222	61	0	0	271	1,902	1,691
MARKET SHARES	0.9%	0.4%	0.3%	0.0%	0.0%	0.7%	1.7%	1.0%

Table: **74**

FORECAST RETAIL SALES

Scenario: 1 Location: **Aberfeldy Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		1,201	1,272	1,368	1,459	
4	7,090	6,850	7,028	7,272		4,913	5,207	5,602	5,969	
5	0	0	0	0		0	0	0	0	
TOTALS	7,090	6,850	7,028	7,272		6,114	6,479	6,969	7,429	

Table: **75**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (Dunkeld Street)	135	95	128	9,200	1,180
Premier (Bank Street)	162	95	154	7,450	1,147
Other convenience goods shops and stores	225	98	221	5,000	1,103
ALL STORES	522		503	6,822	3,429

Sources: CPW Planning. The Retail Group. ProMap.

Table: **76**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: 77

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Aberfeldy Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000	7,090	6,850	7,028	7,272		6,114	6,479	6,969	7,429	
Plus visitors' spending (%)	3.0	3.0	3.0	3.0		5.0	5.0	5.0	5.0	
Total spending (£000)	7,302	7,055	7,239	7,490		6,420	6,803	7,318	7,800	
Existing shop floorspace (sq m net)	503	503	503	503		1,354	1,354	1,354	1,354	
Sales per sq m net (£)	14,528	6,822	6,822	6,822		4,742	5,236	5,781	6,382	
Sales from extg flrspce (£000)	7,302	3,429	3,429	3,429		6,420	7,088	7,826	8,641	
Available spending to support new shops (£000)	0	3,626	3,810	4,061		0	-286	-508	-841	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	3,626	3,810	4,061		0	-286	-508	-841	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)	**0**	**315**	**331**	**353**		**0**	**-52**	**-83**	**-125**	

Market Share of Catchment Area Expenditure	1.4%	1.4%	1.4%	1.4%		0.9%	0.9%	0.9%	0.9%	

Scenario 1

Pitlochry Town Centre

Table: **78**

CONVENIENCE GOODS MARKET SHARES IN 2022

2022

Pitlochry Town Centre

Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	0.0	0.0	0.0
2	0.0	0.0	0.0
3	0.0	0.0	0.0
4	20.7	49.3	29.3
5	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: **79**

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

2022 Allocations to
Pitlochry Town Centre
Indicated by Household Interview Survey

	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
Zones	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	4.4	0.0	0.7	1.1	0.0	12.2	40.3	14.4	11.9
5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: **80**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Pitlochry Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors:
Convenience Goods: 100 % of survey indicated figures
Comparison Goods: 100 % of survey indicated figures

Catchment Zone	PROPORTION OF CATCHMENT AREA EXPENDITURE ATTRACTED									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	29	29	29	29		12	12	12	12	
5	0	0	0	0		0	0	0	0	

Sources: Tables 78 and 79.

Table: **81**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	2022 Sales in **Pitlochry Town Centre** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0
4	475	0	9	19	0	286	2,894	1,637
5	0	0	0	0	0	0	0	0
TOTALS	475	0	9	19	0	286	2,894	1,637
MARKET SHARES	0.3%	0.0%	0.0%	0.1%	0.0%	0.8%	2.6%	0.9%

Table: **82**

FORECAST RETAIL SALES

Scenario: 1 Location: **Pitlochry Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK
1	0	0	0	0		0	0	0	0	
2	0	0	0	0		0	0	0	0	
3	0	0	0	0		0	0	0	0	
4	9,346	9,029	9,265	9,585		5,360	5,680	6,111	6,512	
5	0	0	0	0		0	0	0	0	
TOTALS	9,346	9,029	9,265	9,585		5,360	5,680	6,111	6,512	

Table: 83

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Co-op (West Moulin Road)	748	95	711	9,200	6,538
Other convenience goods shops and stores	791	90	712	5,000	3,560
ALL STORES	1,539		1,423	7,098	10,097

Sources: Experian Goad (December 2021). Perth & Kinross Town Centre and Retail Study 2016. CPW Planning.

Table: 84

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
(None of significance)			-		-
ALL STORES	-		-		-
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Table: **85**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Pitlochry Town Centre**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000	9,346	9,029	9,265	9,585		5,360	5,680	6,111	6,512	
Plus visitors' spending (%)	15.0	15.0	15.0	15.0		25.0	25.0	25.0	25.0	
Total spending (£000)	10,747	10,384	10,654	11,023		6,700	7,100	7,639	8,140	
Existing shop floorspace (sq m net)	1,423	1,423	1,423	1,423		4,484	4,484	4,484	4,484	
Sales per sq m net (£)	7,555	7,098	7,098	7,098		1,494	1,650	1,821	2,011	
Sales from extg flrspce (£000)	10,747	10,097	10,097	10,097		6,700	7,397	8,167	9,017	
Available spending to support new shops (£000)	0	287	557	926		0	-296	-528	-877	
Less sales capacity of committed new floorspace (£000)	0	0	0	0		0	0	0	0	
Net available spending for new shops (£000)	0	287	557	926		0	-296	-528	-877	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)	**0**	**25**	**48**	**81**		**0**	**-54**	**-87**	**-130**	

Market Share of Catchment Area Expenditure	1.9%	1.9%	1.9%	1.9%		0.8%	0.8%	0.8%	0.8%	

Scenario 1

Non-central stores in the Perth and Kinross area

Table: 86

CONVENIENCE GOODS MARKET SHARES IN 2022

2022

Non-central stores in the Perth and Kinross area

Zones	Main food	Top-up food	WEIGHTED AVERAGE
	Q1	Q5	
	Expenditure weighting		
	70	30	100
	(%)	(%)	(%)
1	85.7	62.9	78.9
2	38.0	39.1	38.3
3	41.3	12.2	32.6
4	49.5	8.5	37.2
5	18.1	26.9	20.7

Sources: Household Interview Survey 2022.
Expenditure weighting by CPW Planning informed by Q3 and Q6 of the Household Interview Survey 2022.

Table: 87

COMPARISON GOODS MARKET SHARES BY GOODS TYPE IN 2022

2022 Allocations to

Non-central stores in the Perth and Kinross area

Indicated by Household Interview Survey

Zones	Clothing & footwear	Furniture/ floor coverings etc	Household Textiles	Household Appliances	Audio-visual equipment	Hardware, DIY, garden products	Chemist, medical & beauty goods	All other comparison gds	WEIGHTED AVERAGE
	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	
	Expenditure weighting								
	827	255	97	135	499	178	547	863	3,400
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	14.7	23.7	59.6	69.6	70.4	79.7	19.7	21.5	32.9
2	4.2	14.9	34.2	20.9	25.1	23.4	1.2	9.8	11.5
3	5.0	12.8	41.5	43.4	50.0	40.6	5.5	9.7	17.9
4	6.7	28.0	58.4	84.3	76.2	65.8	8.5	5.9	26.2
5	0.5	2.0	24.6	7.9	11.1	18.2	3.2	7.9	6.4

Sources: Household Interview Survey 2022.
Table 4 for expenditure weights.

Table: **88**

MARKET SHARES ATTRACTED FROM THE CATCHMENT AREA

Scenario: 1 Location: **Non-central stores in the Perth and Kinross area**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Market shares correction factors:			
	Convenience Goods:	100	% of survey indicated figures
	Comparison Goods:	100	% of survey indicated figures

Catchment Zone	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)	2022 (%)	2027 (%)	2032 (%)	2037 (%)	BLANK (%)
1	79	79	79	79		33	33	33	33	
2	38	38	38	38		11	11	11	11	
3	33	33	33	33		18	18	18	18	
4	37	37	37	37		26	26	26	26	
5	21	21	21	21		6	6	6	6	

Sources: Tables 86 and 87.

Table: **89**

COMPARISON GOODS SALES BY GOODS TYPE IN 2022

Catchment Zones	2022 Sales in **Non-central stores in the Perth and Kinross area** By Comparison Goods Type. Clothing & footwear (£000)	Furniture/ florcvrgs etc (£000)	Household Textiles (£000)	Household Appliances (£000)	Audio-visual equipment (£000)	Hardware, DIY, garden products (£000)	Chemists, medcl & beauty goods (£000)	All other comparison gds (£000)
1	11,159	5,537	5,295	8,608	32,253	13,040	9,887	17,032
2	1,278	1,408	1,232	1,045	4,646	1,548	238	3,129
3	1,461	1,149	1,421	2,064	8,812	2,555	1,063	2,958
4	725	938	743	1,491	4,992	1,542	611	669
5	117	142	677	301	1,567	920	492	1,934
TOTALS	14,740	9,173	9,366	13,509	52,270	19,605	12,291	25,722
MARKET SHARES	8.7%	17.5%	47.0%	48.8%	50.9%	53.4%	10.9%	14.5%

Table: **90**

FORECAST RETAIL SALES

Scenario: 1 Location: **Non-central stores in the Perth and Kinross area**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Catchment zone	RETAIL SALES BY CATCHMENT ZONE									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK (£000)	2022 (£000)	2027 (£000)	2032 (£000)	2037 (£000)	BLANK (£000)
1	176,754	170,819	175,332	180,203		103,002	109,204	117,509	124,758	
2	34,967	33,763	34,649	35,653		13,897	14,719	15,834	16,817	
3	27,970	26,985	27,673	28,676		21,625	22,891	24,618	26,271	
4	11,924	11,520	11,820	12,229		11,613	12,307	13,240	14,109	
5	14,797	14,282	14,668	15,117		5,788	6,129	6,598	7,006	
TOTALS	266,412	257,370	264,142	271,878		155,925	165,250	177,799	188,961	

Table: **91**

SALES CAPACITY OF EXISTING
MAIN FOOD & CONVENIENCE GOODS SHOPS AND STORES IN 2022

Store	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net convnce Goods Floorspace (sq m)	Convenience Goods sales Density (£ per sq m)	Convenience Goods sales (£000)
Aldi (Broich Road - Crieff)	1,254	80	1,003	10,050	10,082
Aldi (Glasgow Road - Perth)	928	80	742	10,050	7,461
Aldi (Inveralmond Retail Park, Ruthvenfield Road - Perth)	1,250	80	1,000	10,050	10,050
Asda (Dunkeld Road - Perth)	5,483	65	3,564	10,100	35,996
Iceland: The Food Warehouse (St Catherines Retail Park - Perth)	1,115	100	1,115	5,500	6,133
Lidl (Perth Road - Blairgowrie)	1,300	85	1,105	8,900	9,835
Lidl (Riggs Road - Perth)	1,126	85	957	8,900	8,518
M&S Foodhall (Inveralmond Retail Park, Ruthvenfield Road - Perth)	1,115	95	1,059	8,400	8,898
Morrisons (Caledonian Road - Perth)	3,476	85	2,955	10,100	29,841
Sainsbury's (Station Road - Kinross)	2,030	85	1,726	9,900	17,082
Tesco Extra (Crieff Road - Perth)	5,504	65	3,578	10,500	37,565
Tesco Superstore (Edinburgh Road - Perth)	3,710	75	2,783	10,500	29,216
Other (estimated) convenience goods shops and stores	7,500	95	7,125	7,000	49,875
ALL STORES	35,791		28,711	9,075	260,552

Sources: Perth & Kinross Town Centre and Retail Study 2016. Perth & Kinross Council. CPW Planning.

Table: **92**

SALES CAPACITY OF EXISTING COMPARISON GOODS FLOORSPACE

Net to gross ratio: 90 % (unless otherwise indicated)				2020
Store	Gross Flrspce (sq m)	Net Flrspce (sq m)	Sales Density (£per sqm net)	Sales (£000)
St Catherines Retail Park (St Catherines Road - Perth) (1)	18,010	15,604	4,500	70,219
Inveralmond Retail Park (Ruthvenfield Road - Perth)	3,800	3,420	4,200	14,364
Inveralmond Trade Park (Ruthvenfield Road - Perth) (2)	1,600	1,224	4,000	4,896
Solus retail warehouses:				
B&Q (Crieff Road - Perth) (3)	5,806	3,484	1,700	5,922
B&M Store and Garden Centre (Broich Road - Crieff)	n/a	1,104	1,800	1,987
Home Bargains (Perth Road - Blairgowrie)	n/a	1,995	1,800	3,591
Main foodstores - comparison goods floorspace:				
Aldi (Broich Road - Crieff)	n/a	251	6,800	1,705
Aldi (Glasgow Road - Perth)	n/a	186	6,800	1,262
Aldi (Inveralmond Retail Park, Ruthvenfield Road - Perth)	n/a	250	6,800	1,700
Asda (Dunkeld Road - Perth)	n/a	1,919	7,000	13,433
Lidl (Perth Road - Blairgowrie)	n/a	195	5,000	975
Lidl (Riggs Road - Perth)	n/a	169	5,000	845
Morrisons (Caledonian Road - Perth)	n/a	521	6,500	3,389
Sainsbury's (Station Road - Kinross)	n/a	305	7,200	2,192
Tesco Extra (Crieff Road - Perth)	n/a	1,926	7,000	13,485
Tesco Superstore (Edinburgh Road - Perth)	n/a	928	7,000	6,493
TOTALS Trading at the date of the Household Interview Survey 2022		33,480	4,374	146,459

Sources: Perth & Kinross Town Centre and Retail Study 2016. Perth & Kinross Council. CPW Planning.

Notes:
(1) Includes net sales area deduction for trade and/or non-retail sales associated with Halfords and Wickes.
(2) Includes net sales area deduction for trade and/or non-retail sales associated with Screwfix and Toolstation.
(3) 4,645 sq m net sales but 25% excluded for trade and/or non-retail sales.

Table: **93**

SALES CAPACITY OF COMMITTED RETAIL DEVELOPMENTS 2022

CONVENIENCE GOODS					
Store/Scheme	Net Floorspace (sq m)	Convenience Goods Allocation (%)	Net Conv Gds Floorspace (sq m)	Conv Goods Sales Density (£ p sq m net)	Conv Goods Sales (£000)
Proposed 'replacement' Aldi (Glasgow Road - Perth) - application ref. 21/00248/FLL	387	80	310	10,050	3,111
ALL STORES	387		310		3,111
COMPARISON GOODS					
Store/Scheme	Gross Floorspace (sq m)	Net to Gross Ratio (%)	Net Floorspace (sq m)	Sales Density (£ p sq m net)	Sales (£000)
(None of significance)			-		-
ALL STORES AND SCHEMES	-		-		-

Sources:

Notes: Proposed 'replacement' Aldi measures 1,315 sqm net but 387 sqm net accounting for the existing Aldi (928 sqm net) to be demolished and replaced.

Table: **94**

FORECAST RETAIL CAPACITY

Scenario: 1 Location: **Non-central stores in the Perth and Kinross area**

Baseline - Market shares indicated by the Household Interview Survey 2022 remain unchanged throughout the forecasting period.

Growth in sales per sq m from shop floorspace existing in 2022 Comparison Goods: 2.00 % pa 2022 to 2037

	CONVENIENCE GOODS					COMPARISON GOODS				
	2022	2027	2032	2037	BLANK	2022	2027	2032	2037	BLANK
Residents' Spending £000	266,412	257,370	264,142	271,878		155,925	165,250	177,799	188,961	
Plus visitors' spending (%)	-	-	-	-		3.0	3.0	3.0	3.0	
Total spending (£000)	266,412	257,370	264,142	271,878		160,603	170,208	183,133	194,630	
Existing shop floorspace (sq m net)	28,711	28,711	28,711	28,711		33,480	33,480	33,480	33,480	
Sales per sq m net (£)	9,279	9,075	9,075	9,075		4,797	5,025	5,548	6,125	
Sales from extg flrspce (£000)	266,412	260,552	260,552	260,552		160,603	168,235	185,745	205,077	
Available spending to support new shops (£000)	0	-3,182	3,590	11,326		0	1,973	-2,612	-10,447	
Less sales capacity of committed new floorspace (£000)	0	3,111	3,111	3,111		0	0	0	0	
Net available spending for new shops (£000)	0	-6,294	478	8,215		0	1,973	-2,612	-10,447	
Sales per sq m net in new shops (£)	11,500	11,500	11,500	11,500		5,000	5,520	6,095	6,729	
Capacity for new shop flrspc (sq m net)	**0**	**-547**	**42**	**714**		**0**	**357**	**-429**	**-1,552**	

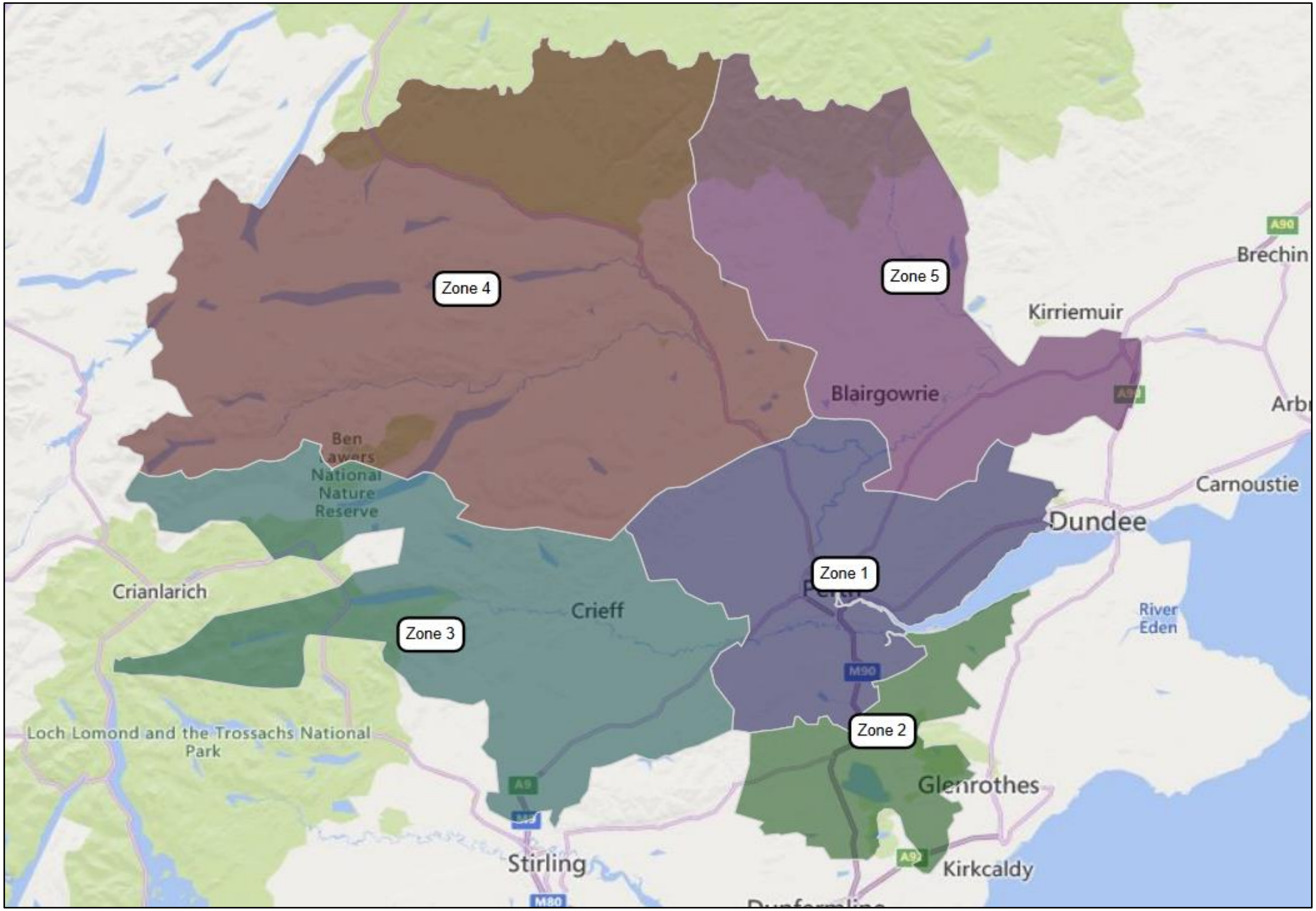
Market Share of Catchment Area Expenditure	52.9%	53.0%	53.0%	52.9%		22.3%	22.3%	22.3%	22.3%	

Sources: CPW Planning. Table 92 for existing comparison goods floorspace.

Notes:

Appendix D

Map of the catchment area



Zone 1
Zone 2
Zone 3
Zone 4
Zone 5
Brechin
Kirriemuir
Blairgowrie
Carnoustie
Dundee
Ben
Lawers
National
Nature
Reserve
Crianlarich
Crieff
River
Eden
Loch Lomond and the Trossachs National
Park
Glenrothes
Stirling
Kirkcaldy
A90
A9
M90
M80

Appendix E

Results of the 2022 household telephone survey

Perth & Kinross Household Survey for CPW Planning

Q01 Where does your household do most of its main food and grocery shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aldi, Broich Road, Crieff, PH7 3SE	3.0%	30	0.0%	0	0.0%	0	19.7%	28	2.5%	2	0.0%	0
Aldi, Flemington Road, Glenrothes, KY7 5QF	0.6%	6	0.0%	0	7.0%	6	0.0%	0	0.0%	0	0.0%	0
Aldi, Glasgow Road, Perth, PH2 0NZ	4.3%	44	6.6%	38	1.4%	1	1.7%	2	2.1%	2	0.4%	1
Aldi, Myrekirk Road, Dundee, DD2 4WB	1.2%	12	1.9%	11	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Aldi, Ruthvenfield Road, Perth, PH1 3EE	5.8%	59	8.8%	50	0.0%	0	0.3%	0	10.0%	8	0.2%	0
Aldi, Stenhouse Street, Cowdenbeath, KY4 9DG	0.8%	8	0.0%	0	9.7%	8	0.0%	0	0.0%	0	0.0%	0
Aldi, The Stack Retail Park, Dundee, DD2 3XN	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Asda (Dundee Kirkton), Derwent Avenue, Dundee, DD3 0SZ	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Milton), Milton Of Craigie Road, Dundee, DD4 7RX	0.6%	6	0.4%	2	0.0%	0	0.0%	0	0.0%	0	2.4%	3
Asda (Dundee West), Myrekirk Road, Dundee, DD2 4WB	0.8%	8	1.2%	7	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Asda (Glenrothes), Fullerton Road, Glenrothes, KY7 5QB	0.6%	6	0.0%	0	7.4%	6	0.0%	0	0.0%	0	0.0%	0
Asda (Perth), Dunkeld Road, Perth, PH1 5AP	9.5%	96	13.7%	78	0.6%	0	5.4%	8	10.2%	8	1.2%	2
BP Garage, Broxden Services, Perth, PH2 0PX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, (Petrol Station), Perth Road, Pitlochry, PH16 5LY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (Scotmid), Airlie Street, Alyth, PH11 8AJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (Scotmid), Commercial Street, Coupar Angus, PH13 9AD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (Scotmid), George Street, Coupar Angus, PH13 9DJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Co-op (Scotmid), Hatton Road, Rattray, Blairgowrie, PH10 7AW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (Scotmid), Laxford Road, Rimbleton, Glenrothes, KY6 2EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (Scotmid), Main Street, Invergowrie, Dundee, DD2 5AB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (Scotmid), West Mains Avenue, Perth, PH1 1QZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Argyll Road, Perth, PH1 3BZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Bridge Street, Dunkeld, PH8 0AH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Co-op, Coupar Angus Road, Rosemount, Blairgowrie, PH10 6JR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Co-op, Darnhall Drive, Perth, PH2 0HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Dunkeld Street, Aberfeldy, PH15 2AF	1.4%	14	0.0%	0	0.0%	0	0.0%	0	17.5%	14	0.0%	0
Co-op, High Street, Auchterarder, PH3 1AA	0.5%	5	0.0%	0	0.0%	0	3.4%	5	0.0%	0	0.0%	0
Co-op, High Street, Newburgh, Cupar, KY14 6AQ	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Low Road, Auchtermuchty, Cupar, KY14 7AU	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Co-op, Lyon Road, Killin, FK21 8UJ	0.6%	6	0.0%	0	0.0%	0	3.6%	5	0.9%	1	0.0%	0
Co-op, Main Street, Bridge End, Perth, PH2 7HB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Main Street, Bridge of Earn, Perth, PH2 9PJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Market Square, Alyth, PH11 8AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Co-op, Perth Road, Scone, PH2 6JL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Perth Street, Blairgowrie, PH10 6DL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Rannoch Road, Letham, Perth, PH1 2DP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Town Green, Crieff, PH7 4DE	0.8%	9	0.0%	0	0.0%	0	6.0%	9	0.0%	0	0.0%	0
Co-op, Tulloch Square, Perth, PH1 2PW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, West Moulin Road, Pitlochry, PH16 5EA	1.2%	12	0.0%	0	0.0%	0	0.0%	0	15.3%	12	0.0%	0
Farmfoods, Crieff Road, Perth, PH1 2RP	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Farmfoods, Flights Lane, Lochee, Dundee, DD2 3PX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Farmfoods, MacAlpine Road, Dundee, DD3 8RE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, North Street, Glenrothes, KY7 5PP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland (The Food Warehouse), North Street, Glenrothes, KY7 5PP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland (The Food Warehouse), St Catherines Retail Park, Perth, PH1 5XA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Wellgate Shopping Centre, Dundee, DD1 2DB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, High Street, Cowdenbeath, KY4 9FF	0.2%	2	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Lidl, Leslie Road, Glenrothes, KY7 5PS	0.2%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Lidl, MacAlpine Road, Dundee, DD3 9HU	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2
Lidl, Perth Road, Blairgowrie, PH10 6FW	1.8%	18	0.3%	1	0.0%	0	0.0%	0	0.4%	0	12.4%	16
Lidl, Riggs Road, Perth, PH1 1PR	2.1%	21	3.4%	19	0.0%	0	0.8%	1	0.8%	1	0.0%	0
Lidl, South Road, Lochee, Dundee, DD2 3EG	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Londis, Dundee Road, Inchmichael Garage, Errol, PH2 7RR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Londis, St Johnstone Service Station, Dunkeld Road, Perth, PH1 5RG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Foodhall, Ruthvenfield Road, Inveralmond, Perth, PH1 3EE	1.4%	14	2.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food (BP), The Triangle, Perth, PH1 3GA	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, Kingdom Avenue, Glenrothes, KY7 5PP	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, Kinross Services, Junction 6, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S, High Street, Perth, PH1 5TJ	1.1%	11	1.8%	11	0.0%	0	0.3%	0	0.0%	0	0.0%	0
McColl's, Charleston Drive, Menzieshill, Angus, Dundee, DD2 4AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
McColl's, High Street,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Strathmiglo, Cupar, KY14 7QA												
McColl's, Oakbank Road, Perth, PH1 1HA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Afton Way, Dundee, DD4 8BR	0.2%	2	0.0%	0	0.2%	0	0.0%	0	0.0%	0	1.5%	2
Morrisons, Caledonian Road, Perth, PH1 5XD	7.0%	70	10.3%	59	0.6%	0	5.9%	8	2.0%	2	0.7%	1
Morrisons, Flemington Road, Glenrothes, KY7 5QS	0.6%	6	0.0%	0	7.1%	6	0.0%	0	0.0%	0	0.0%	0
Morrisons, Main Street, Cowdenbeath, KY4 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa, Bridgend, Dunning, Perth, PH2 0RS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa, Main Street, Bankfoot, PH1 4AB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa, Perth Road, Murthly, PH1 4HG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Alyth Store), Commercial Street, Alyth, PH11 8AF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Balhousie Store), Balhousie Street, Perth, PH1 5BG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Bertha Park Store), Drummond Way, Perth, PH1 0AQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Coupar Angus Store), George Street, Coupar Angus, PH13 9DW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Fairfield Store), Crieff Road, Perth, PH1 2RP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Tainsh Store), Rannoch Road, Perth, PH1 2DF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local Dundee, Perth Road, Dundee, DD2 1AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local Perth, High Street, Perth, PH1 5PB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, High Street, Blairgowrie, PH10 6ET	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Sainsbury's Superstore, Station Road, Kinross, KY13 8FH	2.5%	25	0.3%	1	28.1%	24	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Tom Johnston Road, Dundee, DD4 8XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shop Local, Rannoch Road, Letham, Perth, PH1 2DP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Abbey Road, Scone, PH2 6RU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, High Street, Auchterarder, PH3 1AF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Marshall Way, Luncarty, PH1 3UX	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Percy Street, Stanley, PH1 4LU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, The Cross, High Street, Errol, PH2 7QW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express (Petrol Station), Perth Road, Scone, PH2 6JJ	0.2%	2	0.3%	2	0.0%	0	0.3%	0	0.4%	0	0.0%	0
Tesco Express, South Street, Perth, PH2 8PA	0.8%	9	1.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crieff Road, Perth, PH1 2NR	9.5%	96	14.7%	85	0.6%	0	2.9%	4	9.0%	7	0.0%	0
Tesco Extra, South Road, Dundee, DD2 4SR	1.0%	10	1.7%	10	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Tesco Superstore, Edinburgh	10.8%	109	17.9%	103	5.3%	4	1.2%	2	0.4%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Road, Perth, PH2 8DX												
Tesco Superstore, Welton Road, Blairgowrie, PH10 6NQ	2.6%	26	0.8%	5	0.0%	0	0.0%	0	0.4%	0	16.2%	21
Elsewhere in Aberfeldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Auchterarder Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Blairgowrie Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Crieff Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Kinross Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Perth City Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Elsewhere in Pitlochry Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Aberfeldy	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Alyth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Elsewhere in Blairgowrie	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Coupar Angus	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Crieff	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Dunkeld	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Kinross	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Perth	0.4%	4	0.7%	4	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Elsewhere in Pitlochry	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	8.9%	90	7.6%	44	4.0%	3	7.4%	11	24.1%	19	9.6%	13
Abernethy Licenced Store, Main Street, Abernethy, PH2 9JH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Basin View, Montrose, DD10 8DE	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Aldi, Craig O Loch Road, Forfar, DD8 1BT	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	15
Aldi, Ferrard Road, Kirkcaldy, KY2 5RY	0.1%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Aldi, Friars Bridge, Inverness, IV3 5JP	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Aldi, Halbeath Road, Dunfermline, KY12 7QY	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Lynn Road, Oban, PA34 4PH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Aldi, South Road, Cupar, KY15 5JE	0.5%	5	0.3%	2	3.9%	3	0.0%	0	0.0%	0	0.0%	0
Aldi, Springbank Road, Stirling, FK7 7WR	1.0%	10	0.0%	0	0.0%	0	6.8%	10	0.0%	0	0.0%	0
Allan's of Auchterarder, High Street, Auchterarder, PH3 1AF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Carberry Road, Kirkcaldy, KY1 3NU	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Halbeath Road Retail Park, Dunfermline, KY11 4LP	0.5%	5	0.0%	0	6.5%	5	0.0%	0	0.0%	0	0.0%	0
Asda, New Road, Forfar, DD8 2AE	2.9%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	22.4%	29
B&M, Academy Street, Forfar, DD8 2XF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Balbeggie Village Store, Main Street, Balbeggie, PH2 6EZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Baynes, High Street, Leslie, KY6 3AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Baynes, Postgate, Glenrothes, KY7 5LH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Birnam Village Shop, Murthly Terrace, Birnam, PH8 0BG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blair Drummond Smiddy Farm Shop, A873, Blair Drummond, FK9 4UY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Braco Shop, Front Street, Braco, FK15 9QN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge of Cally Post Office, Main Road, Bridge of Cally, PH10 7JG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burrelton Stores, High Street, Burrelton, PH10 7RE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Post Office, Bridge Street, Comrie, PH6 2EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Cadham, Glenrothes, KY7 6RU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Dunblane, FK15 0ER	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0
Co-op, Main Street, Kelty, KY4 0AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Cardenden, KY5 0BN	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Blackhall Square, Kelty, KY4 0EP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Country Shop, Bridge End, Kinloch Rannoch, PH16 5PX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
CS Convenience Store, Constitution Road, Dundee, DD1 1LA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Day Today Express, Drummond Street, Comrie, Crieff, PH6 2EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DG Lindsay & Son, North Methven Street, Perth, PH1 5PN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Burrelton Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Elsewhere in Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Dunblane Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Dundee City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Dunfermline Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Forfar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Glenfarg Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Kelty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Lochore Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Faskally Caravan Park Shop, off A9, Pitlochry, PH16 5LD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Butchers, Lyon Way, Glenrothes, KY7 5NW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fish In Crieff, East High Street, Crieff, PH7 3AF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Garth Avenue Newsagents,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Garth Avenue, Perth, PH1 2LG												
Glendoick Garden Centre, A90, Glendoick, PH2 7NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gloagburn Farm Shop, Tibbermore, Perth, PH1 1QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goodfellow & Steven, High Street, Blairgowrie, PH10 6ET	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goodfellow & Steven, Scott Street, Perth, PH1 5EJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greens of Kinross, High Street, Kinross, KY13 8AN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Myre Road, Forfar, DD8 1AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Perth Road, Blairgowrie, PH10 6FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, St Catherines Retail Park, Perth, PH1 5XA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
HW Irvine Butchers, Perth Street, Blairgowrie, PH10 6DQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenmore Bakery, Easdale, Acharn, Kenmore, PH15 2HS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Key Store, Cardenden Road, Cardenden, KY5 0PD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Key Store, Green Road, Kinross, KY13 8TU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Key Store, High Street, Leslie, KY6 3AX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkmichael Village Shop, Main Street, Kirkmichael, PH10 7NT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Clackmannan Road, Alloa, FK10 4DA	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Lidl, Esplanade, Kirkcaldy, KY1 1SL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Players Road, Stirling, FK7 7SH	0.8%	8	0.0%	0	0.0%	0	5.5%	8	0.0%	0	0.0%	0
Lidl, Queenswell Road, Forfar, DD8 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Lidl, Station Road, Cupar, KY15 5HX	0.2%	2	0.0%	0	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Loch Leven's Larder, Channel Farm, Kinross, KY13 9HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lynn's Convenience Store, Lochleven Road, Lochore, KY5 8DA	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
M&S (Foodhall), Stirling Road, Dunblane, FK15 9EY	0.4%	4	0.0%	0	0.0%	0	2.8%	4	0.0%	0	0.0%	0
M&S, High Street, Dunfermline, KY12 7DP	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
M&S, Port Street, Stirling, FK8 2EN	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
McColl's, Drummond Street, Comrie, Crieff, PH6 2DS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
McColl's, Main Street, Kinglassie, KY5 0XA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Post Office, Main Street, Methven, PH1 3PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mitchells Newsagent, High Street, Blairgowrie, PH10 6ET	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Esplanade, Kirkcaldy, KY1 1SL	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Hume Street, Arbroath, DD11 1UH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Morrisons, Munro Road,	0.4%	4	0.0%	0	0.0%	0	2.6%	4	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Stirling, FK7 7SR												
Newtyle Village Store, North Street, Newtyle, PH12 8TY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa, Moray Street, Blackford, PH4 1PY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa, New Road, Milnathort, KY13 9XT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pillars of Hercules Organic Farm Shop, A912, Falkland, KY15 7AD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier, Anderson Drive, Leslie, KY6 3LF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier, Arthur Street, Blairgowrie, PH10 6PB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier, Atholl Road, Pitlochry, PH16 5BL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Premier, Auchtermuchty, Cupar, KY14 7DW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier, Lady Wynd, Cupar, KY15 4DE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier, Station Road, Cardenden, KY5 0BW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier, The Square, Blair Atholl, PH18 5TQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Balmakeith Business Park, Nairn, IV12 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Sainsbury's Superstore, Drip Road, Stirling, FK8 1RA	0.8%	8	0.7%	4	0.0%	0	2.7%	4	0.0%	0	0.0%	0
Sainsbury's Superstore, Fife Central Retail Park, Kirkcaldy, KY2 6QL	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Spar, Academy Street, Forfar, DD8 2XF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, East High Street, Crieff, PH7 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Main Street, Inchture, PH14 9RN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, The Square, Meigle, PH12 8RN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Strathyre Village Shop, Main Street, Strathyre, FK18 8NA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Main Street, Callander, FK17 8AL	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Tesco Express, Station Road, Cardenden, KY5 0BW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Auld Brig Road, Alloa, FK10 1EG	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Kingsway, Dundee, DD3 8QB	0.5%	5	0.1%	1	0.0%	0	0.0%	0	0.0%	0	3.3%	4
Tesco Extra, Riverside Drive, Dundee, DD2 1UG	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Turnstone Road, Dunfermline, KY11 8EG	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Forfar, DD8 3HX	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.6%	11
Tesco Superstore, South Road, Cupar, KY15 5JE	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Springfield Terrace, Dunblane, FK15 9AE	1.5%	15	0.0%	0	0.0%	0	10.9%	15	0.0%	0	0.0%	0
Tesco Superstore, Wallace Street, Stirling, FK8 1NP	0.5%	5	0.0%	0	0.0%	0	3.8%	5	0.0%	0	0.0%	0
Tesco Superstore, Winterthur Lane, Dunfermline, KY12 7BD	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
TH Stevenson & Sons, Percy Street, Stanley, PH1 4LU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Handy Shop,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Drummond Street, Comrie, PH6 2DW												
The Village Shop, Main Street, Longforgan, DD2 5EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tilt Stores, Bridge of Tilt, Blair Atholl, PH18 5SX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tombreck Farm Shop, A827, Lawers, Aberfeldy, PH15 2PB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Viewfield Garage, Willoughby Street, Muthill, PH5 2AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Burghmuir Retail Park, Stirling, FK7 7NZ	0.4%	4	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0
Wee Shop and Deli, Main Road, Aberuthven, PH3 1HB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't do this type of shopping)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Q02 Which retailer do you normally purchase your main food internet / delivery shopping from?
Those that said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Amazon	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda	14.9%	13	8.3%	4	0.0%	0	19.3%	2	28.0%	5	18.3%	2
Co-op	1.2%	1	0.0%	0	0.0%	0	7.3%	1	1.7%	0	0.0%	0
Iceland	0.2%	0	0.0%	0	6.1%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons	13.8%	12	5.0%	2	0.0%	0	8.4%	1	34.4%	7	20.6%	3
Ocado	0.4%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Sainsbury’s	5.0%	4	3.3%	1	0.0%	0	14.6%	2	0.0%	0	11.9%	2
Tesco	56.8%	51	73.2%	32	52.3%	2	50.4%	5	29.2%	6	49.2%	6
Waitrose	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hello Fresh	0.8%	1	1.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wiltshire Farm Foods	0.4%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
(Don't know / varies)	6.5%	6	8.6%	4	41.6%	1	0.0%	0	3.3%	1	0.0%	0
Weighted base:		90		44		3		11		19		13
Sample:		103		32		9		18		28		16

Meanscore: [£]

Q03 In a week, approximately how much does your household spend on main food and grocery shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
£1 - £5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£6 - £10	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.2%	0
£11 - £15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
£16 - £20	0.9%	9	0.9%	5	0.5%	0	0.8%	1	2.0%	2	0.2%	0
£21 - £25	1.0%	10	0.8%	5	0.7%	1	1.1%	2	1.2%	1	1.8%	2
£26 - £30	2.8%	28	1.8%	10	9.3%	8	3.7%	5	3.6%	3	1.8%	2
£31 - £35	2.7%	28	3.3%	19	1.9%	2	0.5%	1	0.8%	1	4.5%	6
£36 - £40	4.7%	48	3.0%	17	3.1%	3	8.3%	12	5.1%	4	8.9%	12
£41 - £45	2.0%	20	2.0%	11	2.2%	2	1.4%	2	2.1%	2	2.6%	3
£46 - £50	10.0%	101	10.9%	63	9.6%	8	7.7%	11	5.5%	4	11.2%	15
£51 - £60	10.8%	109	12.9%	74	7.1%	6	8.3%	12	8.6%	7	8.0%	11
£61 - £70	10.9%	110	11.7%	67	8.5%	7	10.8%	15	10.7%	9	8.8%	12
£71 - £80	6.2%	63	4.1%	24	11.4%	10	8.0%	11	6.7%	5	9.8%	13
£81 - £90	4.0%	40	4.2%	24	5.8%	5	3.8%	5	2.4%	2	3.2%	4
£91 - £100	14.2%	144	17.6%	101	11.8%	10	5.3%	8	15.2%	12	10.2%	13
£101 - £110	0.7%	7	0.5%	3	3.2%	3	0.6%	1	0.0%	0	0.5%	1
£111 - £120	3.6%	36	3.8%	22	5.6%	5	2.0%	3	3.8%	3	2.9%	4
£121 - £130	1.9%	19	1.8%	10	0.2%	0	4.3%	6	3.0%	2	0.2%	0
£131 - £140	0.2%	2	0.0%	0	0.2%	0	0.3%	0	0.8%	1	0.7%	1
£141 - £150	5.1%	52	3.9%	22	5.6%	5	5.5%	8	8.1%	7	7.7%	10
£151 - £175	1.8%	18	1.0%	6	1.9%	2	5.0%	7	2.5%	2	1.3%	2
£176 - £200	3.0%	30	2.1%	12	1.7%	1	5.8%	8	3.1%	2	4.4%	6
£201 - £225	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£226 - £250	0.8%	8	1.0%	6	0.2%	0	0.0%	0	0.0%	0	1.1%	2
£251 - £275	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£276 - £300	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.4%	0	0.0%	0
£301+	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	10.7%	109	10.6%	61	8.8%	7	13.4%	19	13.1%	11	7.9%	10
(Refused)	1.6%	16	1.3%	7	0.5%	0	3.5%	5	0.4%	0	2.0%	3
Mean:		*84.56*		*84.18*		*80.53*		*88.27*		*87.64*		*83.24*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Q04 When members of your household do main food shopping at (LOCATION MENTIONED AT Q01) do they normally combine this trip with another activity?
Not those that said 'Internet / delivery' at Q01

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Yes – NON-FOOD shopping	8.2%	76	8.3%	44	6.4%	5	8.1%	11	9.9%	6	8.3%	10
Yes – other FOOD shopping	8.0%	74	6.6%	35	7.4%	6	8.7%	11	12.8%	8	11.9%	14
Yes – buying fuel (visiting petrol station)	1.7%	16	0.9%	5	3.5%	3	2.4%	3	5.1%	3	1.7%	2
Yes – using services such as banks or dry cleaners	2.1%	19	1.9%	10	0.5%	0	2.3%	3	6.0%	4	1.8%	2
Yes – visiting health service such as doctor, dentist, hospital	0.8%	8	0.5%	2	0.8%	1	0.9%	1	5.0%	3	0.2%	0
Yes – visiting parks	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – visiting library	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.5%	0	0.0%	0
Yes – leisure activity	3.6%	33	3.7%	20	5.6%	5	1.0%	1	4.7%	3	3.8%	5
Yes – visit friends / relatives	1.6%	15	1.0%	5	2.8%	2	1.8%	2	0.0%	0	4.2%	5
Yes – travelling to / from school / college / university (includes school-run)	0.8%	8	1.0%	5	0.0%	0	0.0%	0	2.8%	2	0.6%	1
Yes – travelling to / from work	3.5%	32	3.8%	20	3.8%	3	3.6%	5	1.8%	1	2.5%	3
Yes – visiting place of worship	0.1%	1	0.0%	0	0.3%	0	0.0%	0	0.5%	0	0.0%	0
Yes – window shopping / browsing	0.7%	7	0.4%	2	0.3%	0	2.2%	3	1.1%	1	0.6%	1
Yes – going for a walk / walk the dog	0.9%	8	0.6%	3	1.8%	1	2.5%	3	0.5%	0	0.0%	0
Yes – other activity	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – visiting cafe / restaurant / pub	2.3%	21	2.4%	13	1.3%	1	2.1%	3	5.1%	3	1.3%	2
(No activity)	57.4%	530	58.9%	312	60.7%	49	64.0%	84	42.7%	26	48.7%	58
(Don’t know / varies)	8.2%	76	9.9%	53	4.9%	4	0.6%	1	1.6%	1	14.4%	17
Weighted base:		923		530		81		132		61		119
Sample:		910		294		166		157		122		171

Q05 Where does your household do most of its shopping for small scale 'top-up' food and convenience goods items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aldi, Broich Road, Crieff, PH7 3SE	0.4%	4	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0
Aldi, Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glasgow Road, Perth, PH2 0NZ	1.3%	13	2.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Myrekirk Road, Dundee, DD2 4WB	1.2%	12	1.9%	11	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Aldi, Ruthvenfield Road, Perth, PH1 3EE	2.8%	28	4.5%	26	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Aldi, Stenhouse Street, Cowdenbeath, KY4 9DG	0.4%	4	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0
Aldi, The Stack Retail Park, Dundee, DD2 3XN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Kirkton), Derwent Avenue, Dundee, DD3 0SZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Milton), Milton Of Craigie Road, Dundee, DD4 7RX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Asda (Dundee West), Myrekirk Road, Dundee, DD2 4WB	0.6%	7	1.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Glenrothes), Fullerton Road, Glenrothes, KY7 5QB	0.5%	5	0.7%	4	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Perth), Dunkeld Road, Perth, PH1 5AP	2.9%	29	4.8%	28	0.0%	0	1.2%	2	0.0%	0	0.0%	0
BP Garage, Broxden Services, Perth, PH2 0PX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Budgens, (Petrol Station), Perth Road, Pitlochry, PH16 5LY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Co-op (Scotmid), Airlie Street, Alyth, PH11 8AJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Co-op (Scotmid), Commercial Street, Coupar Angus, PH13 9AD	1.0%	10	1.4%	8	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Co-op (Scotmid), George Street, Coupar Angus, PH13 9DJ	0.7%	7	0.1%	1	0.0%	0	0.0%	0	0.0%	0	4.8%	6
Co-op (Scotmid), Hatton Road, Rattray, Blairgowrie, PH10 7AW	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Co-op (Scotmid), Laxford Road, Rimbleton, Glenrothes, KY6 2EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (Scotmid), Main Street, Invergowrie, Dundee, DD2 5AB	0.7%	8	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op (Scotmid), West Mains Avenue, Perth, PH1 1QZ	1.3%	13	2.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Argyll Road, Perth, PH1 3BZ	0.7%	7	1.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Bridge Street, Dunkeld, PH8 0AH	0.6%	6	0.0%	0	0.0%	0	0.0%	0	6.9%	6	0.0%	0
Co-op, Coupar Angus Road, Rosemount, Blairgowrie, PH10 6JR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Co-op, Darnhall Drive, Perth, PH2 0HD	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Dunkeld Street, Aberfeldy, PH15 2AF	1.1%	11	0.0%	0	0.0%	0	0.0%	0	14.0%	11	0.0%	0
Co-op, High Street, Auchterarder, PH3 1AA	2.0%	20	0.0%	0	0.2%	0	14.1%	20	0.0%	0	0.0%	0
Co-op, High Street, Newburgh, Cupar, KY14 6AQ	1.0%	10	0.6%	3	7.7%	6	0.0%	0	0.0%	0	0.0%	0
Co-op, Low Road, Auchtermuchty, Cupar, KY14 7AU	0.5%	5	0.0%	0	5.4%	5	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Co-op, Lyon Road, Killin, FK21 8UJ	0.7%	7	0.0%	0	0.0%	0	4.8%	7	0.0%	0	0.0%	0
Co-op, Main Street, Bridge End, Perth, PH2 7HB	1.3%	13	2.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Main Street, Bridge of Earn, Perth, PH2 9PJ	1.7%	17	3.0%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Market Square, Alyth, PH11 8AA	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	4
Co-op, Perth Road, Scone, PH2 6JL	1.8%	19	3.3%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Perth Street, Blairgowrie, PH10 6DL	0.4%	4	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Co-op, Rannoch Road, Letham, Perth, PH1 2DP	0.5%	5	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Town Green, Crieff, PH7 4DE	0.8%	8	0.1%	1	0.0%	0	5.4%	8	0.0%	0	0.0%	0
Co-op, Tulloch Square, Perth, PH1 2PW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, West Moulin Road, Pitlochry, PH16 5EA	2.7%	28	0.0%	0	0.0%	0	0.0%	0	34.2%	28	0.0%	0
Farmfoods, Crieff Road, Perth, PH1 2RP	1.8%	18	3.1%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Flights Lane, Lochee, Dundee, DD2 3PX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, MacAlpine Road, Dundee, DD3 8RE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, North Street, Glenrothes, KY7 5PP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland (The Food Warehouse), North Street, Glenrothes, KY7 5PP	0.2%	2	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Iceland (The Food Warehouse), St Catherines Retail Park, Perth, PH1 5XA	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Wellgate Shopping Centre, Dundee, DD1 2DB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, High Street, Cowdenbeath, KY4 9FF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, MacAlpine Road, Dundee, DD3 9HU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Perth Road, Blairgowrie, PH10 6FW	1.0%	10	0.1%	1	0.6%	0	0.0%	0	0.0%	0	6.8%	9
Lidl, Riggs Road, Perth, PH1 1PR	1.0%	10	1.7%	10	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Lidl, South Road, Lochee, Dundee, DD2 3EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Londis, Dundee Road, Inchmichael Garage, Errol, PH2 7RR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Londis, St Johnstone Service Station, Dunkeld Road, Perth, PH1 5RG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Foodhall, Ruthvenfield Road, Inveralmond, Perth, PH1 3EE	1.4%	15	2.5%	14	0.0%	0	0.0%	0	0.4%	0	0.0%	0
M&S Simply Food (BP), The Triangle, Perth, PH1 3GA	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, Kingdom Avenue, Glenrothes, KY7 5PP	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
M&S Simply Food, Kinross Services, Junction 6, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
M&S, High Street, Perth, PH1 5TJ	1.5%	16	2.7%	15	0.2%	0	0.0%	0	0.0%	0	0.0%	0
McColl's, Charleston Drive, Menzieshill, Angus, Dundee, DD2 4AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
McColl's, High Street,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Strathmiglo, Cupar, KY14 7QA												
McColl's, Oakbank Road, Perth, PH1 1HA	0.6%	6	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Afton Way, Dundee, DD4 8BR	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Morrisons, Caledonian Road, Perth, PH1 5XD	2.2%	22	3.2%	18	0.0%	0	1.7%	2	0.0%	0	1.5%	2
Morrisons, Flemington Road, Glenrothes, KY7 5QS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Main Street, Cowdenbeath, KY4 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa, Bridgend, Dunning, Perth, PH2 0RS	0.6%	6	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nisa, Main Street, Bankfoot, PH1 4AB	0.8%	8	1.3%	8	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Nisa, Perth Road, Murthly, PH1 4HG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Alyth Store), Commercial Street, Alyth, PH11 8AF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Balhousie Store), Balhousie Street, Perth, PH1 5BG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Bertha Park Store), Drummond Way, Perth, PH1 0AQ	0.5%	5	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Coupar Angus Store), George Street, Coupar Angus, PH13 9DW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Fairfield Store), Crieff Road, Perth, PH1 2RP	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier (Tainsh Store), Rannoch Road, Perth, PH1 2DF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local Dundee, Perth Road, Dundee, DD2 1AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local Perth, High Street, Perth, PH1 5PB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, High Street, Blairgowrie, PH10 6ET	0.3%	3	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Sainsbury's Superstore, Station Road, Kinross, KY13 8FH	2.2%	23	0.1%	1	26.1%	22	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Tom Johnston Road, Dundee, DD4 8XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shop Local, Rannoch Road, Letham, Perth, PH1 2DP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Abbey Road, Scone, PH2 6RU	0.7%	7	1.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, High Street, Auchterarder, PH3 1AF	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Spar, Marshall Way, Luncarty, PH1 3UX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Percy Street, Stanley, PH1 4LU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, The Cross, High Street, Errol, PH2 7QW	1.0%	11	1.8%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express (Petrol Station), Perth Road, Scone, PH2 6JJ	1.9%	20	3.4%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, South Street, Perth, PH2 8PA	2.4%	24	4.2%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crieff Road, Perth, PH1 2NR	5.0%	50	8.4%	48	0.0%	0	0.3%	0	2.1%	2	0.0%	0
Tesco Extra, South Road, Dundee, DD2 4SR	0.2%	2	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh	4.0%	41	6.9%	40	0.0%	0	0.0%	0	0.9%	1	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Road, Perth, PH2 8DX												
Tesco Superstore, Welton Road, Blairgowrie, PH10 6NQ	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	5
Elsewhere in Aberfeldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Elsewhere in Auchterarder Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Elsewhere in Blairgowrie Town Centre	0.2%	2	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	2
Elsewhere in Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Crieff Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Kinross Town Centre	0.4%	4	0.0%	0	5.0%	4	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Perth City Centre	0.7%	7	0.4%	2	0.0%	0	3.5%	5	0.0%	0	0.0%	0
Elsewhere in Pitlochry Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Elsewhere in Aberfeldy	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Elsewhere in Alyth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Elsewhere in Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Blairgowrie	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Elsewhere in Coupar Angus	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Elsewhere in Crieff	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Dunkeld	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Elsewhere in Kinross	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Perth	0.5%	5	0.8%	5	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Pitlochry	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	1.5%	15	1.3%	7	0.8%	1	4.2%	6	1.3%	1	0.0%	0
Abernethy Licenced Store, Main Street, Abernethy, PH2 9JH	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Basin View, Montrose, DD10 8DE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Craig O Loch Road, Forfar, DD8 1BT	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Aldi, Ferrard Road, Kirkcaldy, KY2 5RY	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Friars Bridge, Inverness, IV3 5JP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Halbeath Road, Dunfermline, KY12 7QY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Lynn Road, Oban, PA34 4PH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, South Road, Cupar, KY15 5JE	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Springbank Road, Stirling, FK7 7WR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Allan's of Auchterarder, High Street, Auchterarder, PH3 1AF	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Asda, Carberry Road, Kirkcaldy, KY1 3NU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Halbeath Road Retail Park, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, New Road, Forfar, DD8 2AE	1.7%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.4%	18
B&M, Academy Street, Forfar, DD8 2XF	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Balbeggie Village Store, Main Street, Balbeggie, PH2 6EZ	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Baynes, High Street, Leslie, KY6 3AZ	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Baynes, Postgate, Glenrothes, KY7 5LH	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Birnam Village Shop, Murthly Terrace, Birnam, PH8 0BG	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Blair Drummond Smiddy Farm Shop, A873, Blair Drummond, FK9 4UY	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0
Braco Shop, Front Street, Braco, FK15 9QN	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Bridge of Cally Post Office, Main Road, Bridge of Cally, PH10 7JG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Burrelton Stores, High Street, Burrelton, PH10 7RE	0.4%	4	0.1%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	3
Comrie Post Office, Bridge Street, Comrie, PH6 2EB	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Co-op, Cadham, Glenrothes, KY7 6RU	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Dunblane, FK15 0ER	0.5%	5	0.0%	0	0.0%	0	3.3%	5	0.0%	0	0.0%	0
Co-op, Main Street, Kelty, KY4 0AA	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Station Road, Cardenden, KY5 0BN	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Costcutter, Blackhall Square, Kelty, KY4 0EP	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Country Shop, Bridge End, Kinloch Rannoch, PH16 5PX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
CS Convenience Store, Constitution Road, Dundee, DD1 1LA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Day Today Express, Drummond Street, Comrie, Crieff, PH6 2EB	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
DG Lindsay & Son, North Methven Street, Perth, PH1 5PN	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Burrelton Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Elsewhere in Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Cowdenbeath Town Centre	0.1%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Dunblane Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Elsewhere in Dundee City Centre	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2
Elsewhere in Dunfermline Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Elsewhere in Forfar Town Centre	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	8
Elsewhere in Glenfarg Village Centre	0.4%	5	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Glenrothes Town Centre	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Kelty Village Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Elsewhere in Lochore Village Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Milnathort Town Centre	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Elsewhere in Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Faskally Caravan Park Shop, off A9, Pitlochry, PH16 5LD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Fife Butchers, Lyon Way, Glenrothes, KY7 5NW	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Fish In Crieff, East High Street, Crieff, PH7 3AF	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0
Garth Avenue Newsagents,	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Garth Avenue, Perth, PH1 2LG												
Glendoick Garden Centre, A90, Glendoick, PH2 7NS	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gloagburn Farm Shop, Tibbermore, Perth, PH1 1QL	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Goodfellow & Steven, High Street, Blairgowrie, PH10 6ET	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Goodfellow & Steven, Scott Street, Perth, PH1 5EJ	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greens of Kinross, High Street, Kinross, KY13 8AN	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Myre Road, Forfar, DD8 1AZ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Home Bargains, Perth Road, Blairgowrie, PH10 6FH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Home Bargains, St Catherines Retail Park, Perth, PH1 5XA	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
HW Irvine Butchers, Perth Street, Blairgowrie, PH10 6DQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Kenmore Bakery, Easdale, Acharn, Kenmore, PH15 2HS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Key Store, Cardenden Road, Cardenden, KY5 0PD	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Key Store, Green Road, Kinross, KY13 8TU	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Key Store, High Street, Leslie, KY6 3AX	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Kirkmichael Village Shop, Main Street, Kirkmichael, PH10 7NT	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2
Lidl, Clackmannan Road, Alloa, FK10 4DA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Esplanade, Kirkcaldy, KY1 1SL	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Players Road, Stirling, FK7 7SH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Queenswell Road, Forfar, DD8 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Station Road, Cupar, KY15 5HX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loch Leven's Larder, Channel Farm, Kinross, KY13 9HD	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Lynn's Convenience Store, Lochleven Road, Lochore, KY5 8DA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S (Foodhall), Stirling Road, Dunblane, FK15 9EY	0.9%	9	0.0%	0	0.0%	0	6.4%	9	0.0%	0	0.0%	0
M&S, High Street, Dunfermline, KY12 7DP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
M&S, Port Street, Stirling, FK8 2EN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
McColl's, Drummond Street, Comrie, Crieff, PH6 2DS	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
McColl's, Main Street, Kinglassie, KY5 0XA	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Methven Post Office, Main Street, Methven, PH1 3PS	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mitchells Newsagent, High Street, Blairgowrie, PH10 6ET	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Morrisons, Esplanade, Kirkcaldy, KY1 1SL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Hume Street, Arbroath, DD11 1UH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Munro Road,	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Stirling, FK7 7SR												
Newtyle Village Store, North Street, Newtyle, PH12 8TY	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3
Nisa, Moray Street, Blackford, PH4 1PY	0.3%	3	0.0%	0	0.0%	0	1.8%	3	0.0%	0	0.0%	0
Nisa, New Road, Milnathort, KY13 9XT	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Pillars of Hercules Organic Farm Shop, A912, Falkland, KY15 7AD	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Premier, Anderson Drive, Leslie, KY6 3LF	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Premier, Arthur Street, Blairgowrie, PH10 6PB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Premier, Atholl Road, Pitlochry, PH16 5BL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Premier, Auchtermuchty, Cupar, KY14 7DW	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Premier, Lady Wynd, Cupar, KY15 4DE	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier, Station Road, Cardenden, KY5 0BW	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Premier, The Square, Blair Atholl, PH18 5TQ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Sainsbury's Superstore, Balmakeith Business Park, Nairn, IV12 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Drip Road, Stirling, FK8 1RA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Fife Central Retail Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Academy Street, Forfar, DD8 2XF	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Spar, East High Street, Crieff, PH7 3JA	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Spar, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Spar, Main Street, Inchture, PH14 9RN	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Spar, The Square, Meigle, PH12 8RN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Strathyre Village Shop, Main Street, Strathyre, FK18 8NA	0.2%	2	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Tesco Express, Main Street, Callander, FK17 8AL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Station Road, Cardenden, KY5 0BW	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Auld Brig Road, Alloa, FK10 1EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Kingsway, Dundee, DD3 8QB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Tesco Extra, Riverside Drive, Dundee, DD2 1UG	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Turnstone Road, Dunfermline, KY11 8EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Forfar, DD8 3HX	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.7%	13
Tesco Superstore, South Road, Cupar, KY15 5JE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Springfield Terrace, Dunblane, FK15 9AE	1.5%	15	0.0%	0	0.0%	0	10.8%	15	0.0%	0	0.0%	0
Tesco Superstore, Wallace Street, Stirling, FK8 1NP	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Tesco Superstore, Winterthur Lane, Dunfermline, KY12 7BD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
TH Stevenson & Sons, Percy Street, Stanley, PH1 4LU	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Handy Shop,	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Drummond Street, Comrie, PH6 2DW												
The Village Shop, Main Street, Longforgan, DD2 5EW	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tilt Stores, Bridge of Tilt, Blair Atholl, PH18 5SX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Tombreck Farm Shop, A827, Lawers, Aberfeldy, PH15 2PB	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0
Viewfield Garage, Willoughby Street, Muthill, PH5 2AE	0.4%	4	0.0%	0	0.0%	0	2.8%	4	0.0%	0	0.0%	0
Waitrose, Burghmuir Retail Park, Stirling, FK7 7NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wee Shop and Deli, Main Road, Aberuthven, PH3 1HB	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.4%	24	1.4%	8	2.5%	2	0.9%	1	4.9%	4	6.6%	9
(Don't do this type of shopping)	16.4%	166	13.3%	77	24.5%	21	22.7%	32	23.6%	19	13.4%	18
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Meanscore: [£]

Q06 In a week, approximately how much does your household spend on ‘top-up’ food shopping?
Not those that said '(Don't do this type of shopping)' at Q05

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
£1 - £5	4.9%	42	4.3%	22	6.3%	4	5.7%	6	5.3%	3	5.9%	7
£6 - £10	25.4%	215	27.2%	135	17.0%	11	15.1%	17	17.8%	11	35.9%	41
£11 - £15	11.7%	99	14.1%	70	11.1%	7	6.6%	7	7.0%	4	8.8%	10
£16 - £20	20.8%	176	21.9%	109	23.0%	15	15.6%	17	17.9%	11	21.6%	25
£21 - £25	7.7%	65	7.7%	38	9.1%	6	9.7%	11	9.9%	6	3.8%	4
£26 - £30	7.8%	66	6.3%	31	4.0%	3	17.8%	20	6.6%	4	7.0%	8
£31 - £35	2.2%	19	2.2%	11	7.2%	5	1.2%	1	2.1%	1	0.5%	1
£36 - £40	3.3%	28	3.3%	16	3.4%	2	4.5%	5	2.1%	1	2.8%	3
£41 - £45	0.5%	4	0.0%	0	2.2%	1	0.4%	0	1.1%	1	1.6%	2
£46 - £50	3.2%	27	2.7%	13	4.6%	3	3.1%	3	9.0%	6	1.3%	2
£51 - £60	1.3%	11	1.2%	6	0.6%	0	1.6%	2	2.8%	2	0.6%	1
£61 - £70	0.2%	2	0.0%	0	0.0%	0	0.4%	0	0.0%	0	1.5%	2
£71 - £80	0.1%	1	0.0%	0	0.0%	0	0.4%	0	0.5%	0	0.0%	0
£81 - £90	0.5%	4	0.9%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91 - £100	0.6%	5	0.8%	4	0.3%	0	0.0%	0	0.5%	0	0.3%	0
£101 - £110	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£111 - £120	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£121 - £130	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
£131 - £140	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£141 - £150	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£151 - £175	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£176 - £200	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£201 - £225	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£226 - £250	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£251 - £275	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£276 - £300	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£301+	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	7.8%	66	6.2%	31	10.4%	7	11.3%	13	15.0%	9	6.1%	7
(Refused)	2.0%	17	1.2%	6	0.6%	0	6.6%	7	1.1%	1	2.3%	3
Mean:		*20.70*		*20.16*		*21.94*		*22.88*		*25.87*		*17.97*
Weighted base:		847		498		63		110		62		114
Sample:		778		259		124		135		109		151

Q07 Where does your household do most of its shopping for clothing and footwear?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aberfeldy Town Centre	0.5%	5	0.0%	0	0.0%	0	1.6%	2	3.6%	3	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.2%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	5.8%	59	4.2%	24	1.3%	1	0.0%	0	0.0%	0	25.6%	34
Dunfermline Town Centre	0.5%	5	0.0%	0	6.4%	5	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Edinburgh City Centre	2.0%	21	2.5%	14	5.1%	4	0.8%	1	0.4%	0	0.4%	1
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	1.3%	13	0.5%	3	0.6%	0	4.9%	7	3.3%	3	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.4%	4	0.0%	0	4.5%	4	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.1%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	25.1%	254	29.7%	171	15.3%	13	22.2%	32	32.6%	26	9.5%	12
Pitlochry Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	3.5%	36	0.7%	4	0.0%	0	22.0%	31	0.4%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.5%	6	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country Store)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren Kitchens & more)	0.3%	3	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	2.3%	23	3.3%	19	1.9%	2	0.6%	1	1.7%	1	0.0%	0
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, King's Cross Road, Dundee, DD2 3PT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Crieff Road, Perth, PH1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cashmere at Lochleven, Lochleven Mills, Kinross, KY13 8DH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Cupar, KY15 4RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Turfhills, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Plant Centre, Muthill Road, Crieff, PH7 4HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre Perth, Huntingtower Park, Crieff Road, Perth, PH1 3JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glendoick Garden Centre, A90, Perth, PH2 7NS	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenhill Garden Nursery, Tibbermore, Perth, PH1 1QN	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Perth Road, Blairgowrie, PH10 6FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Straiton Road, Loanhead, Edinburgh, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Jamesfield Garden Centre, Abernethy, Perth, KY14 6EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Linden Garden Centre, Glencarse, Perth, PH2 7LX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glasgow Road, Perth, PH2 0NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Ruthvenfield Road, Perth, PH1 3EE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Stenhouse Street, Cowdenbeath, KY4 9DG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Stack Retail Park, Dundee, DD2 3XN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Kirkton), Derwent Avenue, Dundee, DD3 0SZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Milton), Milton Of Craigie Road, Dundee, DD4 7RX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Asda (Dundee West), Myrekirk Road, Dundee, DD2 4WB	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Glenrothes), Fullerton Road, Glenrothes, KY7 5QB	0.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Asda (Perth), Dunkeld Road, Perth, PH1 5AP	1.2%	13	2.0%	11	0.0%	0	0.3%	0	0.9%	1	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Lidl, High Street, Cowdenbeath, KY4 9FF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, MacAlpine Road, Dundee, DD3 9HU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Perth Road, Blairgowrie, PH10 6FW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Riggs Road, Perth, PH1 1PR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, South Road, Lochee, Dundee, DD2 3EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Afton Way, Dundee, DD4 8BR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Caledonian Road, Perth, PH1 5XD	0.2%	2	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Morrisons, Flemington Road, Glenrothes, KY7 5QS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Main Street, Cowdenbeath, KY4 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Station Road, Kinross, KY13 8FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Tom Johnston Road, Dundee, DD4 8XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crieff Road, Perth, PH1 2NR	0.1%	1	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.2%	0
Tesco Extra, South Road, Dundee, DD2 4SR	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.5%	5	0.9%	5	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	45.7%	463	47.5%	273	46.8%	39	33.7%	48	45.7%	37	50.4%	66
Aberdeen City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Abroath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Affinity Sterling Mills Outlet Shopping, The Devon Way, Tillicoultry, FK13 6HQ	0.1%	1	0.1%	1	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Aldi, South Road, Cupar, KY15 5JE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alloa Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arran House Business Park, Arran Road, Perth, PH1 3DZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Carberry Road, Kirkcaldy, KY1 3NU	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Halbeath Road Retail Park, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Muirend Road, Portlethen, Aberdeen, AB12 4XP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, New Road, Forfar, DD8 2AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashbrook Nursery Garden Centre, Forfar Road, Arbroath, DD11 3RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchtermuchty Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Academy Street, Forfar, DD8 2XF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Fife Central Retail Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannerman Decorators, Dunkeld Road, Perth, PH1 5RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bennybeg Plant Centre, Muthill Road, Crieff, PH7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
4HN												
Berwick-upon-Tweed Town Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allan Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Garden Centre, Ladybank Road, Freuchie, Cupar, KY15 7HY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughty Ferry Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buick Furniture, Charleton Road, Montrose, DD10 9EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burghmuir Retail Park, Burghmuir Road, Stirling, FK7 7GX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cadham Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Drive Retail Park, Dunfermline, KY12 7AU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Leisure Centre, Pilmuir Street, Dunfermline, KY12 0QE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carpet Discount Store, Riverview Industrial Park, Friarton Road, Perth, PH2 8BB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Catherines Retail Park, Perth, PH1 5XA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Causewayhead Road, Stirling, FK9 5EY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Retail Park, Grahams Road, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comfort Store, Ferryhill Road, Inverkeithing, KY11 1HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Arnhall Business Park, Endeavour Drive, Westhill, AB32 6UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Costkea Way, Loanhead, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, St Rollox Business Park, Springburn, Glasgow, G21 1YX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Davidsons Chemists, Anderson Street, Dunblane, FK15 9AJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DFS, Milton Link, Newcraighall, Edinburgh, EH15 3QH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Fife Leisure Park, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunshalt Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkirk Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ferngreen Garden Centre, Kirriemuir Road, Forfar, DD8 3TG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.2%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Fife Leisure Park, Whimbrell Place, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	0.9%	9	0.3%	1	0.0%	0	0.0%	0	0.0%	0	5.9%	8
Gatehouse Nursery, A826, Aberfeldy, PH15 2EL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenburn Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Glenearn The Flooring Store, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gyle Shopping Centre, Gyle Avenue, Edinburgh, EH12 9JY	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Halbeath Retail Park, Halbeath Road, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Glasgow Road, Stirling, FK7 8ER	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Myre Road, Forfar, DD8 1AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Improvements, Coupar Angus Road, Blairgowrie, PH10 6JR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Houseproud Home Improvement Centre, Perth Road, Crieff, PH7 3EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Braehead Shopping Centre, Glasgow, G51 4FB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
John Smith Business Park, Begg Road, Kirkcaldy, KY2 6HD	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Garden Centre, A921, Kirkcaldy, KY1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leslie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Letham Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.2%	2	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.5%	1
Magnet Trade, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MKM Building Supplies Perth, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moyness Nurseries, Coupar Angus Road, Blairgowrie, PH10 6UT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muirhead Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muthill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newburgh Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peebles Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Rejects Department Store, St Clair Street, Kirkcaldy, KY1 2BS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rosemount Local Centre, Blairgowrie	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Drip Road, Stirling, FK8 1RA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scottish Antique & Arts Centre, Abernyte Road, Abernyte, PH14 9SJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Dryburgh Industrial Estate, Dundee, DD2 3QQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Pitreavie Industrial Estate, Dunfermline, KY11 8UX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Queenswell Road, Forfar, DD8 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Furniture, Moss	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Road, Tillicoultry, FK13 6NS												
Sterling Furniture, South Road, Lochee, Dundee, DD2 4SR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Home, Kingseat Road, Dunfermline, KY11 8PQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stewart's Building Services, West Third, Auchterarder, PH3 1NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Straiton Retail Park, Straiton Mains, Straiton, EH20 9PW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Auld Brig Road, Alloa, FK10 1EG	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Turnstone Road, Dunfermline, KY11 8EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Forfar, DD8 3HX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Central Retail Park, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Springfield Terrace, Dunblane, FK15 9AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Wallace Street, Stirling, FK8 1NP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Welton Road, Blairgowrie, PH10 6NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Centre Livingston, Almondvale Avenue, Livingston, EH54 6QX	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Tillicoultry Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Travis Perkins, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Webster Building Supplies, Stirling Road, Milnathort, KY13 9XR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whittons Flooring, Lochside Road, Forfar, DD8 3JD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.6%	16	2.2%	12	2.9%	2	0.3%	0	0.8%	1	0.2%	0
(Don't do this type of shopping)	3.8%	38	2.7%	15	3.5%	3	5.4%	8	7.3%	6	4.7%	6
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Q08 Where does your household do most of its shopping for furniture, carpets and other floor coverings?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aberfeldy Town Centre	0.2%	2	0.0%	0	0.0%	0	0.3%	0	2.5%	2	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.3%	3	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	1.1%	11	0.0%	0	0.0%	0	0.0%	0	1.2%	1	7.7%	10
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Cupar Town Centre	0.2%	2	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	4.8%	49	4.3%	24	0.2%	0	0.3%	0	1.7%	1	17.3%	23
Dunfermline Town Centre	0.3%	3	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	1.1%	11	1.7%	10	1.0%	1	0.3%	0	0.4%	0	0.2%	0
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.4%	4	0.0%	0	0.0%	0	2.9%	4	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.3%	3	0.0%	0	3.2%	3	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	13.6%	138	15.5%	89	7.8%	7	10.4%	15	25.8%	21	5.0%	7
Pitlochry Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	1.6%	16	2.8%	16	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.8%	8	0.3%	1	0.0%	0	4.6%	7	0.0%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.6%	6	1.0%	6	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.3%	3	0.4%	2	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country Store)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	5.0%	50	5.8%	34	1.6%	1	1.9%	3	3.8%	3	7.2%	9
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren Kitchens & more)	2.0%	20	0.1%	1	0.0%	0	13.7%	20	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	6.5%	66	7.5%	43	6.2%	5	4.5%	6	12.3%	10	0.9%	1
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, King's Cross Road, Dundee, DD2 3PT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Crieff Road, Perth, PH1 3NZ	0.6%	7	1.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cashmere at Lochleven, Lochleven Mills, Kinross, KY13 8DH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Cupar, KY15 4RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Turfhills, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Plant Centre, Muthill Road, Crieff, PH7 4HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre Perth, Huntingtower Park, Crieff Road, Perth, PH1 3JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glendoick Garden Centre, A90, Perth, PH2 7NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenhill Garden Nursery, Tibbermore, Perth, PH1 1QN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Perth Road, Blairgowrie, PH10 6FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Straiton Road, Loanhead, Edinburgh, EH20 9BY	2.0%	20	3.2%	19	0.6%	0	0.3%	0	0.0%	0	0.7%	1
Jamesfield Garden Centre, Abernethy, Perth, KY14 6EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Linden Garden Centre, Glencarse, Perth, PH2 7LX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glasgow Road, Perth, PH2 0NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Ruthvenfield Road, Perth, PH1 3EE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Stenhouse Street, Cowdenbeath, KY4 9DG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Stack Retail Park, Dundee, DD2 3XN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Kirkton), Derwent Avenue, Dundee, DD3 0SZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Milton), Milton Of Craigie Road, Dundee, DD4 7RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee West), Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Glenrothes), Fullerton Road, Glenrothes, KY7 5QB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Perth), Dunkeld Road, Perth, PH1 5AP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Lidl, High Street, Cowdenbeath, KY4 9FF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, MacAlpine Road, Dundee, DD3 9HU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Perth Road, Blairgowrie, PH10 6FW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Riggs Road, Perth, PH1 1PR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, South Road, Lochee, Dundee, DD2 3EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Afton Way, Dundee, DD4 8BR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Caledonian Road, Perth, PH1 5XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Flemington Road, Glenrothes, KY7 5QS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Main Street, Cowdenbeath, KY4 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Station Road, Kinross, KY13 8FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Tom Johnston Road, Dundee, DD4 8XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crieff Road, Perth, PH1 2NR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, South Road, Dundee, DD2 4SR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	26.1%	264	28.2%	162	31.5%	26	11.8%	17	19.7%	16	32.7%	43
Aberdeen City Centre	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Affinity Sterling Mills Outlet Shopping, The Devon Way, Tillicoultry, FK13 6HQ	0.5%	5	0.0%	0	0.7%	1	2.9%	4	0.4%	0	0.0%	0
Aldi, South Road, Cupar, KY15 5JE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alloa Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arran House Business Park, Arran Road, Perth, PH1 3DZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Carberry Road, Kirkcaldy, KY1 3NU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Halbeath Road Retail Park, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Muirend Road, Portlethen, Aberdeen, AB12 4XP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, New Road, Forfar, DD8 2AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashbrook Nursery Garden Centre, Forfar Road, Arbroath, DD11 3RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchtermuchty Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Academy Street, Forfar, DD8 2XF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Fife Central Retail Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannerman Decorators, Dunkeld Road, Perth, PH1 5RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bennybeg Plant Centre, Muthill Road, Crieff, PH7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
4HN												
Berwick-upon-Tweed Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allan Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Garden Centre, Ladybank Road, Freuchie, Cupar, KY15 7HY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughty Ferry Local Centre	0.3%	3	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Buick Furniture, Charleton Road, Montrose, DD10 9EB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Burghmuir Retail Park, Burghmuir Road, Stirling, FK7 7GX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cadham Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Drive Retail Park, Dunfermline, KY12 7AU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Leisure Centre, Pilmuir Street, Dunfermline, KY12 0QE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carpet Discount Store, Riverview Industrial Park, Friarton Road, Perth, PH2 8BB	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Catherines Retail Park, Perth, PH1 5XA	0.2%	2	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Causewayhead Road, Stirling, FK9 5EY	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Central London / West End	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Retail Park, Grahams Road, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comfort Store, Ferryhill Road, Inverkeithing, KY11 1HD	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Arnhall Business Park, Endeavour Drive, Westhill, AB32 6UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Costkea Way, Loanhead, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, St Rollox Business Park, Springburn, Glasgow, G21 1YX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Davidsons Chemists, Anderson Street, Dunblane, FK15 9AJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DFS, Milton Link, Newcraighall, Edinburgh, EH15 3QH	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Fife Leisure Park, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Dunshalt Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkirk Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ferngreen Garden Centre, Kirriemuir Road, Forfar, DD8 3TG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.2%	2	0.0%	0	2.7%	2	0.0%	0	0.0%	0	0.0%	0
Fife Leisure Park, Whimbrell Place, Dunfermline, KY11 8EX	0.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	5
Gatehouse Nursery, A826, Aberfeldy, PH15 2EL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenburn Town Centre	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Glenearn The Flooring Store, Glenearn Road, Perth, PH2 0NJ	1.5%	15	2.5%	14	0.2%	0	0.0%	0	0.4%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gyle Shopping Centre, Gyle Avenue, Edinburgh, EH12 9JY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halbeath Retail Park, Halbeath Road, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Glasgow Road, Stirling, FK7 8ER	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Myre Road, Forfar, DD8 1AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Improvements, Coupar Angus Road, Blairgowrie, PH10 6JR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Houseproud Home Improvement Centre, Perth Road, Crieff, PH7 3EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Braehead Shopping Centre, Glasgow, G51 4FB	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
John Smith Business Park, Begg Road, Kirkcaldy, KY2 6HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.8%	8	1.0%	5	0.6%	0	0.0%	0	0.0%	0	1.5%	2
Kirkcaldy Garden Centre, A921, Kirkcaldy, KY1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leslie Village Centre	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Letham Local Centre, Perth	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Magnet Trade, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
MKM Building Supplies Perth, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moyness Nurseries, Coupar Angus Road, Blairgowrie, PH10 6UT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muirhead Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muthill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newburgh Town Centre	0.2%	2	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Peebles Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rejects Department Store, St Clair Street, Kirkcaldy, KY1 2BS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rosemount Local Centre, Blairgowrie	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Drip Road, Stirling, FK8 1RA	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Scottish Antique & Arts Centre, Abernyte Road, Abernyte, PH14 9SJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Dryburgh Industrial Estate, Dundee, DD2 3QQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Pitreavie Industrial Estate, Dunfermline, KY11 8UX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Queenswell Road, Forfar, DD8 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Furniture, Moss	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Road, Tillicoultry, FK13 6NS												
Sterling Furniture, South Road, Lochee, Dundee, DD2 4SR	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Home, Kingseat Road, Dunfermline, KY11 8PQ	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Stewart's Building Services, West Third, Auchterarder, PH3 1NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Straiton Retail Park, Straiton Mains, Straiton, EH20 9PW	0.2%	2	0.3%	2	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Auld Brig Road, Alloa, FK10 1EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Turnstone Road, Dunfermline, KY11 8EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Forfar, DD8 3HX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Central Retail Park, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Springfield Terrace, Dunblane, FK15 9AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Wallace Street, Stirling, FK8 1NP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Welton Road, Blairgowrie, PH10 6NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Centre Livingston, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tillicoultry Village Centre	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Travis Perkins, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Webster Building Supplies, Stirling Road, Milnathort, KY13 9XR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whittons Flooring, Lochside Road, Forfar, DD8 3JD	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
(Don't know / varies)	4.3%	44	3.7%	22	7.2%	6	4.9%	7	6.3%	5	3.2%	4
(Don't do this type of shopping)	20.7%	210	18.0%	104	18.2%	15	35.5%	51	24.1%	19	16.0%	21
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Q09 Where does your household do most of its shopping for household textiles and soft furnishings, including bedding?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aberfeldy Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.8%	2	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	0.6%	6	0.1%	1	0.0%	0	0.0%	0	0.4%	0	4.0%	5
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.2%	2	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	2.4%	24	1.2%	7	0.5%	0	0.0%	0	0.0%	0	13.2%	17
Dunfermline Town Centre	0.2%	2	0.1%	1	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Edinburgh City Centre	2.2%	22	2.9%	17	4.3%	4	0.8%	1	0.8%	1	0.2%	0
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.3%	3	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.1%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.6%	6	0.0%	0	7.7%	6	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	12.0%	121	14.6%	84	6.9%	6	10.3%	15	19.2%	16	1.3%	2
Pitlochry Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.9%	9	0.1%	1	0.2%	0	5.4%	8	0.0%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.6%	6	1.0%	5	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country Store)	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	2.2%	22	1.6%	9	0.5%	0	0.3%	0	0.0%	0	9.4%	12
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren Kitchens & more)	1.0%	10	0.0%	0	0.0%	0	7.1%	10	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	25.5%	258	31.9%	183	12.4%	10	21.2%	30	28.6%	23	8.8%	12
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.5%	5	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Broich Road, Crieff, PH7 3SE	0.2%	2	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0
B&Q, King's Cross Road, Dundee, DD2 3PT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Crieff Road, Perth, PH1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cashmere at Lochleven, Lochleven Mills, Kinross, KY13 8DH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Cupar, KY15 4RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Turfhills, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Plant Centre, Muthill Road, Crieff, PH7 4HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre Perth, Huntingtower Park, Crieff Road, Perth, PH1 3JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glendoick Garden Centre, A90, Perth, PH2 7NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenhill Garden Nursery, Tibbermore, Perth, PH1 1QN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Perth Road, Blairgowrie, PH10 6FH	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
IKEA, Straiton Road, Loanhead, Edinburgh, EH20 9BY	0.2%	2	0.1%	1	0.6%	0	0.3%	0	0.0%	0	0.2%	0
Jamesfield Garden Centre, Abernethy, Perth, KY14 6EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Linden Garden Centre, Glencarse, Perth, PH2 7LX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glasgow Road, Perth, PH2 0NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Ruthvenfield Road, Perth, PH1 3EE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Stenhouse Street, Cowdenbeath, KY4 9DG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Stack Retail Park, Dundee, DD2 3XN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Kirkton), Derwent Avenue, Dundee, DD3 0SZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Milton), Milton Of Craigie Road, Dundee, DD4 7RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee West), Myrekirk Road, Dundee, DD2 4WB	0.5%	5	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Asda (Glenrothes), Fullerton Road, Glenrothes, KY7 5QB	0.1%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Asda (Perth), Dunkeld Road, Perth, PH1 5AP	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Lidl, High Street, Cowdenbeath, KY4 9FF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, MacAlpine Road, Dundee, DD3 9HU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Perth Road, Blairgowrie, PH10 6FW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Riggs Road, Perth, PH1 1PR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, South Road, Lochee, Dundee, DD2 3EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Afton Way, Dundee, DD4 8BR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Morrisons, Caledonian Road, Perth, PH1 5XD	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Flemington Road, Glenrothes, KY7 5QS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Main Street, Cowdenbeath, KY4 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Station Road, Kinross, KY13 8FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Tom Johnston Road, Dundee, DD4 8XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crieff Road, Perth, PH1 2NR	1.2%	12	1.9%	11	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Tesco Extra, South Road, Dundee, DD2 4SR	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.2%	2	0.3%	2	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	29.4%	298	29.3%	168	37.2%	31	18.0%	26	26.3%	21	39.6%	52
Aberdeen City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Affinity Sterling Mills Outlet Shopping, The Devon Way, Tillicoultry, FK13 6HQ	0.2%	2	0.0%	0	0.7%	1	0.9%	1	0.0%	0	0.0%	0
Aldi, South Road, Cupar, KY15 5JE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alloa Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arran House Business Park, Arran Road, Perth, PH1 3DZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Carberry Road, Kirkcaldy, KY1 3NU	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Halbeath Road Retail Park, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Muirend Road, Portlethen, Aberdeen, AB12 4XP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, New Road, Forfar, DD8 2AE	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Ashbrook Nursery Garden Centre, Forfar Road, Arbroath, DD11 3RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchtermuchty Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Academy Street, Forfar, DD8 2XF	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
B&M (with Garden Centre), Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Fife Central Retail Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannerman Decorators, Dunkeld Road, Perth, PH1 5RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bennybeg Plant Centre, Muthill Road, Crieff, PH7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
4HN												
Berwick-upon-Tweed Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allan Town Centre	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0
Bridgend Garden Centre, Ladybank Road, Freuchie, Cupar, KY15 7HY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughty Ferry Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buick Furniture, Charleton Road, Montrose, DD10 9EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burghmuir Retail Park, Burghmuir Road, Stirling, FK7 7GX	0.2%	2	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Cadham Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Drive Retail Park, Dunfermline, KY12 7AU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Leisure Centre, Pilmuir Street, Dunfermline, KY12 0QE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carpet Discount Store, Riverview Industrial Park, Friarton Road, Perth, PH2 8BB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Catherines Retail Park, Perth, PH1 5XA	1.5%	15	1.2%	7	2.4%	2	2.5%	4	0.8%	1	1.5%	2
Causewayhead Road, Stirling, FK9 5EY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Retail Park, Grahams Road, Falkirk, FK1 1LW	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Comfort Store, Ferryhill Road, Inverkeithing, KY11 1HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Arnhall Business Park, Endeavour Drive, Westhill, AB32 6UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Costkea Way, Loanhead, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, St Rollox Business Park, Springburn, Glasgow, G21 1YX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Davidsons Chemists, Anderson Street, Dunblane, FK15 9AJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DFS, Milton Link, Newcraighall, Edinburgh, EH15 3QH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Fife Leisure Park, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunshalt Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkirk Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ferngreen Garden Centre, Kirriemuir Road, Forfar, DD8 3TG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Fife Leisure Park, Whimbrell Place, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Gatehouse Nursery, A826, Aberfeldy, PH15 2EL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenburn Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Glenearn The Flooring Store, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gyle Shopping Centre, Gyle Avenue, Edinburgh, EH12 9JY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halbeath Retail Park, Halbeath Road, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Glasgow Road, Stirling, FK7 8ER	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Myre Road, Forfar, DD8 1AZ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Home Improvements, Coupar Angus Road, Blairgowrie, PH10 6JR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Houseproud Home Improvement Centre, Perth Road, Crieff, PH7 3EB	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
IKEA, Braehead Shopping Centre, Glasgow, G51 4FB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness Town Centre	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
John Smith Business Park, Begg Road, Kirkcaldy, KY2 6HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Kirkcaldy Garden Centre, A921, Kirkcaldy, KY1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leslie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Letham Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Magnet Trade, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MKM Building Supplies Perth, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moyness Nurseries, Coupar Angus Road, Blairgowrie, PH10 6UT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muirhead Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muthill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newburgh Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peebles Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rejects Department Store, St Clair Street, Kirkcaldy, KY1 2BS	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Rosemount Local Centre, Blairgowrie	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Drip Road, Stirling, FK8 1RA	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Scottish Antique & Arts Centre, Abernyte Road, Abernyte, PH14 9SJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Dryburgh Industrial Estate, Dundee, DD2 3QQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Pitreavie Industrial Estate, Dunfermline, KY11 8UX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Queenswell Road, Forfar, DD8 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Furniture, Moss	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Road, Tillicoultry, FK13 6NS												
Sterling Furniture, South Road, Lochee, Dundee, DD2 4SR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Home, Kingseat Road, Dunfermline, KY11 8PQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stewart's Building Services, West Third, Auchterarder, PH3 1NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Straiton Retail Park, Straiton Mains, Straiton, EH20 9PW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Auld Brig Road, Alloa, FK10 1EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Turnstone Road, Dunfermline, KY11 8EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Forfar, DD8 3HX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Central Retail Park, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Springfield Terrace, Dunblane, FK15 9AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Wallace Street, Stirling, FK8 1NP	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Tesco Superstore, Welton Road, Blairgowrie, PH10 6NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Centre Livingston, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tillicoultry Village Centre	0.2%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0
Travis Perkins, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Webster Building Supplies, Stirling Road, Milnathort, KY13 9XR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whittons Flooring, Lochside Road, Forfar, DD8 3JD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	3.4%	34	2.9%	17	7.4%	6	3.1%	4	4.4%	4	2.3%	3
(Don't do this type of shopping)	10.0%	101	7.6%	44	10.3%	9	18.4%	26	11.7%	9	10.0%	13
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Q10 Where does your household do most of its shopping for household appliances, such as fridges, washing machines, kettles or hairdryers?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aberfeldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	2.2%	22	0.4%	2	0.0%	0	0.0%	0	1.2%	1	14.1%	19
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	1.8%	19	1.2%	7	0.0%	0	0.0%	0	0.0%	0	9.1%	12
Dunfermline Town Centre	0.2%	2	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	0.9%	9	1.2%	7	2.3%	2	0.3%	0	0.0%	0	0.0%	0
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.6%	6	0.0%	0	0.0%	0	4.2%	6	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	4.9%	49	6.9%	40	3.5%	3	2.3%	3	4.2%	3	0.0%	0
Pitlochry Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.3%	3	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country Store)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	3.2%	33	3.4%	20	0.6%	0	0.0%	0	0.0%	0	9.6%	13
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren	1.6%	16	0.0%	0	0.6%	0	11.0%	16	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Kitchens & more)												
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	22.9%	232	30.1%	173	11.1%	9	15.2%	22	30.1%	24	3.4%	4
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, King's Cross Road, Dundee, DD2 3PT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Crieff Road, Perth, PH1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Cashmere at Lochleven, Lochleven Mills, Kinross, KY13 8DH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Cupar, KY15 4RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Turfhills, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Plant Centre, Muthill Road, Crieff, PH7 4HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre Perth, Huntingtower Park, Crieff Road, Perth, PH1 3JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glendoick Garden Centre, A90, Perth, PH2 7NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenhill Garden Nursery, Tibbermore, Perth, PH1 1QN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Perth Road, Blairgowrie, PH10 6FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Straiton Road, Loanhead, Edinburgh, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Jamesfield Garden Centre, Abernethy, Perth, KY14 6EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Linden Garden Centre, Glencarse, Perth, PH2 7LX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glasgow Road, Perth, PH2 0NZ	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Ruthvenfield Road, Perth, PH1 3EE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Stenhouse Street, Cowdenbeath, KY4 9DG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Stack Retail Park, Dundee, DD2 3XN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Kirkton), Derwent Avenue, Dundee, DD3 0SZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Milton), Milton Of Craigie Road, Dundee, DD4 7RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee West), Myrekirk Road, Dundee, DD2 4WB	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Glenrothes), Fullerton Road, Glenrothes, KY7 5QB	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Perth), Dunkeld Road,	0.6%	6	0.8%	5	0.0%	0	0.6%	1	0.9%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Perth, PH1 5AP												
Lidl, High Street, Cowdenbeath, KY4 9FF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, MacAlpine Road, Dundee, DD3 9HU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Perth Road, Blairgowrie, PH10 6FW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Riggs Road, Perth, PH1 1PR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, South Road, Lochee, Dundee, DD2 3EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Afton Way, Dundee, DD4 8BR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Caledonian Road, Perth, PH1 5XD	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Flemington Road, Glenrothes, KY7 5QS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Main Street, Cowdenbeath, KY4 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Station Road, Kinross, KY13 8FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Tom Johnston Road, Dundee, DD4 8XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crieff Road, Perth, PH1 2NR	1.2%	12	2.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, South Road, Dundee, DD2 4SR	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	46.1%	467	44.2%	254	41.8%	35	50.3%	72	54.6%	44	47.4%	62
Aberdeen City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.2%	2	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Affinity Sterling Mills Outlet Shopping, The Devon Way, Tillicoultry, FK13 6HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, South Road, Cupar, KY15 5JE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alloa Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arran House Business Park, Arran Road, Perth, PH1 3DZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Carberry Road, Kirkcaldy, KY1 3NU	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Halbeath Road Retail Park, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Muirend Road, Portlethen, Aberdeen, AB12 4XP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, New Road, Forfar, DD8 2AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashbrook Nursery Garden Centre, Forfar Road, Arbroath, DD11 3RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchtermuchty Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Academy Street, Forfar, DD8 2XF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Fife Central Retail Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannerman Decorators, Dunkeld Road, Perth, PH1 5RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bennybeg Plant Centre,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Muthill Road, Crieff, PH7 4HN												
Berwick-upon-Tweed Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allan Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Garden Centre, Ladybank Road, Freuchie, Cupar, KY15 7HY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughty Ferry Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buick Furniture, Charleton Road, Montrose, DD10 9EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burghmuir Retail Park, Burghmuir Road, Stirling, FK7 7GX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cadham Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Drive Retail Park, Dunfermline, KY12 7AU	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Leisure Centre, Pilmuir Street, Dunfermline, KY12 0QE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carpet Discount Store, Riverview Industrial Park, Friarton Road, Perth, PH2 8BB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Catherines Retail Park, Perth, PH1 5XA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Causewayhead Road, Stirling, FK9 5EY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Retail Park, Grahams Road, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comfort Store, Ferryhill Road, Inverkeithing, KY11 1HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Arnhall Business Park, Endeavour Drive, Westhill, AB32 6UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Costkea Way, Loanhead, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, St Rollox Business Park, Springburn, Glasgow, G21 1YX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Davidsons Chemists, Anderson Street, Dunblane, FK15 9AJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DFS, Milton Link, Newcraighall, Edinburgh, EH15 3QH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Fife Leisure Park, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunshalt Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkirk Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ferngreen Garden Centre, Kirriemuir Road, Forfar, DD8 3TG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	1.3%	13	0.0%	0	15.3%	13	0.0%	0	0.0%	0	0.0%	0
Fife Leisure Park, Whimbrell Place, Dunfermline, KY11 8EX	0.3%	3	0.0%	0	3.9%	3	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.8%	10
Gatehouse Nursery, A826, Aberfeldy, PH15 2EL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Glenburn Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenearn The Flooring Store, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gyle Shopping Centre, Gyle Avenue, Edinburgh, EH12 9JY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halbeath Retail Park, Halbeath Road, Dunfermline, KY11 4LP	0.7%	7	0.0%	0	8.4%	7	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Glasgow Road, Stirling, FK7 8ER	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Myre Road, Forfar, DD8 1AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Improvements, Coupar Angus Road, Blairgowrie, PH10 6JR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Houseproud Home Improvement Centre, Perth Road, Crieff, PH7 3EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Braehead Shopping Centre, Glasgow, G51 4FB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
John Smith Business Park, Begg Road, Kirkcaldy, KY2 6HD	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Garden Centre, A921, Kirkcaldy, KY1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Leslie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Letham Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Magnet Trade, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MKM Building Supplies Perth, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moyness Nurseries, Coupar Angus Road, Blairgowrie, PH10 6UT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muirhead Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muthill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newburgh Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peebles Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rejects Department Store, St Clair Street, Kirkcaldy, KY1 2BS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rosemount Local Centre, Blairgowrie	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Drip Road, Stirling, FK8 1RA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scottish Antique & Arts Centre, Abernyte Road, Abernyte, PH14 9SJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Dryburgh Industrial Estate, Dundee, DD2 3QQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Pitreavie Industrial Estate, Dunfermline, KY11 8UX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Queenswell Road, Forfar, DD8 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Sterling Furniture, Moss Road, Tillicoultry, FK13 6NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Furniture, South Road, Lochee, Dundee, DD2 4SR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Home, Kingseat Road, Dunfermline, KY11 8PQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stewart's Building Services, West Third, Auchterarder, PH3 1NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Straiton Retail Park, Straiton Mains, Straiton, EH20 9PW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Auld Brig Road, Alloa, FK10 1EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Turnstone Road, Dunfermline, KY11 8EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Forfar, DD8 3HX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Central Retail Park, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Springfield Terrace, Dunblane, FK15 9AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Wallace Street, Stirling, FK8 1NP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Welton Road, Blairgowrie, PH10 6NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Centre Livingston, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tillicoultry Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Travis Perkins, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Webster Building Supplies, Stirling Road, Milnathort, KY13 9XR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whittons Flooring, Lochside Road, Forfar, DD8 3JD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.0%	10	0.3%	1	0.5%	0	2.9%	4	3.6%	3	0.9%	1
(Don't do this type of shopping)	7.1%	72	7.4%	42	4.6%	4	9.6%	14	5.0%	4	5.9%	8
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Q11 Where does your household do most of its shopping for audio-visual equipment, such as TVs, radios, phones, cameras, speakers, and computer products?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aberfeldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	0.8%	8	0.1%	1	0.0%	0	0.0%	0	0.4%	0	5.2%	7
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	1.3%	13	0.7%	4	0.0%	0	0.0%	0	0.9%	1	6.3%	8
Dunfermline Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	1.4%	14	1.9%	11	2.5%	2	0.3%	0	0.4%	0	0.4%	1
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.8%	8	0.1%	1	0.0%	0	4.6%	7	0.4%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	4.9%	50	6.2%	36	5.0%	4	1.7%	2	8.0%	6	0.9%	1
Pitlochry Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.7%	8	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country Store)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	3.9%	39	3.6%	20	0.6%	0	0.0%	0	0.0%	0	14.0%	18
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren	1.4%	14	0.0%	0	0.8%	1	9.6%	14	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Kitchens & more)												
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	25.9%	262	33.0%	189	12.4%	10	21.1%	30	32.6%	26	4.5%	6
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, King's Cross Road, Dundee, DD2 3PT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Crieff Road, Perth, PH1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cashmere at Lochleven, Lochleven Mills, Kinross, KY13 8DH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Cupar, KY15 4RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Turfhills, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Plant Centre, Muthill Road, Crieff, PH7 4HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre Perth, Huntingtower Park, Crieff Road, Perth, PH1 3JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glendoick Garden Centre, A90, Perth, PH2 7NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenhill Garden Nursery, Tibbermore, Perth, PH1 1QN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Perth Road, Blairgowrie, PH10 6FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Straiton Road, Loanhead, Edinburgh, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Jamesfield Garden Centre, Abernethy, Perth, KY14 6EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Linden Garden Centre, Glencarse, Perth, PH2 7LX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glasgow Road, Perth, PH2 0NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Ruthvenfield Road, Perth, PH1 3EE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Stenhouse Street, Cowdenbeath, KY4 9DG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Stack Retail Park, Dundee, DD2 3XN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Kirkton), Derwent Avenue, Dundee, DD3 0SZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Milton), Milton Of Craigie Road, Dundee, DD4 7RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee West), Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Glenrothes), Fullerton Road, Glenrothes, KY7 5QB	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Asda (Perth), Dunkeld Road,	0.9%	9	1.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Perth, PH1 5AP												
Lidl, High Street, Cowdenbeath, KY4 9FF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, MacAlpine Road, Dundee, DD3 9HU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Perth Road, Blairgowrie, PH10 6FW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Riggs Road, Perth, PH1 1PR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, South Road, Lochee, Dundee, DD2 3EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Afton Way, Dundee, DD4 8BR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Caledonian Road, Perth, PH1 5XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Flemington Road, Glenrothes, KY7 5QS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Main Street, Cowdenbeath, KY4 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Station Road, Kinross, KY13 8FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Tom Johnston Road, Dundee, DD4 8XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crieff Road, Perth, PH1 2NR	0.5%	5	0.9%	5	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Tesco Extra, South Road, Dundee, DD2 4SR	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.5%	5	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	39.4%	399	37.0%	212	41.9%	35	39.4%	56	43.3%	35	46.2%	61
Aberdeen City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Affinity Sterling Mills Outlet Shopping, The Devon Way, Tillicoultry, FK13 6HQ	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Aldi, South Road, Cupar, KY15 5JE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alloa Town Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Arran House Business Park, Arran Road, Perth, PH1 3DZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Carberry Road, Kirkcaldy, KY1 3NU	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Halbeath Road Retail Park, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Muirend Road, Portlethen, Aberdeen, AB12 4XP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, New Road, Forfar, DD8 2AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashbrook Nursery Garden Centre, Forfar Road, Arbroath, DD11 3RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchtermuchty Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Academy Street, Forfar, DD8 2XF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Fife Central Retail Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannerman Decorators, Dunkeld Road, Perth, PH1 5RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bennybeg Plant Centre,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Muthill Road, Crieff, PH7 4HN												
Berwick-upon-Tweed Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allan Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Garden Centre, Ladybank Road, Freuchie, Cupar, KY15 7HY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughty Ferry Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buick Furniture, Charleton Road, Montrose, DD10 9EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burghmuir Retail Park, Burghmuir Road, Stirling, FK7 7GX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cadham Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Drive Retail Park, Dunfermline, KY12 7AU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Leisure Centre, Pilmuir Street, Dunfermline, KY12 0QE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carpet Discount Store, Riverview Industrial Park, Friarton Road, Perth, PH2 8BB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Catherines Retail Park, Perth, PH1 5XA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Causewayhead Road, Stirling, FK9 5EY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Retail Park, Grahams Road, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comfort Store, Ferryhill Road, Inverkeithing, KY11 1HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Arnhall Business Park, Endeavour Drive, Westhill, AB32 6UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Costco, Costkea Way, Loanhead, EH20 9BY	0.1%	1	0.1%	1	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Costco, St Rollox Business Park, Springburn, Glasgow, G21 1YX	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Davidsons Chemists, Anderson Street, Dunblane, FK15 9AJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DFS, Milton Link, Newcraighall, Edinburgh, EH15 3QH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Fife Leisure Park, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Dunshalt Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkirk Town Centre	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ferngreen Garden Centre, Kirriemuir Road, Forfar, DD8 3TG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	1.0%	10	0.0%	0	11.7%	10	0.0%	0	0.0%	0	0.0%	0
Fife Leisure Park, Whimbrell Place, Dunfermline, KY11 8EX	0.3%	3	0.0%	0	3.9%	3	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	1.1%	11	0.1%	1	0.0%	0	0.0%	0	0.0%	0	7.9%	10
Gatehouse Nursery, A826, Aberfeldy, PH15 2EL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Glenburn Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenearn The Flooring Store, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gyle Shopping Centre, Gyle Avenue, Edinburgh, EH12 9JY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halbeath Retail Park, Halbeath Road, Dunfermline, KY11 4LP	1.0%	10	0.7%	4	7.4%	6	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Glasgow Road, Stirling, FK7 8ER	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Myre Road, Forfar, DD8 1AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Improvements, Coupar Angus Road, Blairgowrie, PH10 6JR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Houseproud Home Improvement Centre, Perth Road, Crieff, PH7 3EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Braehead Shopping Centre, Glasgow, G51 4FB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
John Smith Business Park, Begg Road, Kirkcaldy, KY2 6HD	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0
Kirkcaldy Garden Centre, A921, Kirkcaldy, KY1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Leslie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Letham Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Magnet Trade, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MKM Building Supplies Perth, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moyness Nurseries, Coupar Angus Road, Blairgowrie, PH10 6UT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muirhead Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muthill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newburgh Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peebles Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rejects Department Store, St Clair Street, Kirkcaldy, KY1 2BS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rosemount Local Centre, Blairgowrie	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Drip Road, Stirling, FK8 1RA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scottish Antique & Arts Centre, Abernyte Road, Abernyte, PH14 9SJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Dryburgh Industrial Estate, Dundee, DD2 3QQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Pitreavie Industrial Estate, Dunfermline, KY11 8UX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Queenswell Road, Forfar, DD8 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Sterling Furniture, Moss Road, Tillicoultry, FK13 6NS	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Sterling Furniture, South Road, Lochee, Dundee, DD2 4SR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Home, Kingseat Road, Dunfermline, KY11 8PQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stewart's Building Services, West Third, Auchterarder, PH3 1NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Straiton Retail Park, Straiton Mains, Straiton, EH20 9PW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Auld Brig Road, Alloa, FK10 1EG	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Tesco Extra, Turnstone Road, Dunfermline, KY11 8EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Forfar, DD8 3HX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Central Retail Park, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Springfield Terrace, Dunblane, FK15 9AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Wallace Street, Stirling, FK8 1NP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Welton Road, Blairgowrie, PH10 6NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Centre Livingston, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tillicoultry Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Travis Perkins, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Webster Building Supplies, Stirling Road, Milnathort, KY13 9XR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whittons Flooring, Lochside Road, Forfar, DD8 3JD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	3.2%	32	3.7%	21	1.3%	1	3.2%	5	5.2%	4	0.9%	1
(Don't do this type of shopping)	9.5%	96	7.9%	45	7.3%	6	14.6%	21	8.7%	7	12.5%	16
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Q12 Where does your household do most of its shopping for hardware, DIY goods, decorating supplies and garden products?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aberfeldy Town Centre	0.6%	6	0.0%	0	0.0%	0	1.6%	2	4.9%	4	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.4%	4	0.0%	0	0.0%	0	3.2%	4	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	1.7%	17	0.1%	1	0.0%	0	0.0%	0	0.0%	0	12.5%	16
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.6%	6	0.0%	0	0.0%	0	4.0%	6	0.0%	0	0.0%	0
Cupar Town Centre	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	1.5%	15	1.0%	6	0.2%	0	0.0%	0	0.0%	0	6.9%	9
Dunfermline Town Centre	0.1%	1	0.0%	0	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Edinburgh City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.2%	2	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.2%	2	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	4.9%	50	5.3%	31	2.5%	2	6.3%	9	8.5%	7	0.7%	1
Pitlochry Town Centre	0.7%	8	0.0%	0	0.0%	0	0.0%	0	9.3%	8	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.5%	6	0.0%	0	0.0%	0	3.9%	6	0.0%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.2%	2	0.1%	1	0.0%	0	0.0%	0	2.1%	2	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country Store)	1.4%	14	2.3%	13	0.2%	0	0.0%	0	1.3%	1	0.0%	0
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	1.4%	15	1.6%	9	0.0%	0	0.0%	0	0.0%	0	4.0%	5
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	1.0%	11	0.0%	0	12.6%	11	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren Kitchens & more)	3.4%	34	0.0%	0	0.0%	0	22.7%	32	2.1%	2	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	5.9%	60	8.0%	46	1.0%	1	4.3%	6	2.7%	2	3.8%	5
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Broich Road, Crieff, PH7 3SE	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
B&Q, King's Cross Road, Dundee, DD2 3PT	5.0%	50	4.6%	27	0.6%	0	0.0%	0	0.0%	0	17.5%	23
B&Q, Crieff Road, Perth, PH1 3NZ	30.9%	313	40.7%	234	12.1%	10	21.9%	31	40.3%	33	3.9%	5
Cashmere at Lochleven, Lochleven Mills, Kinross, KY13 8DH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Cupar, KY15 4RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Turfhills, Kinross, KY13 0NQ	0.2%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Crieff Plant Centre, Muthill Road, Crieff, PH7 4HQ	0.2%	2	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0
Dobbies Garden Centre Perth, Huntingtower Park, Crieff Road, Perth, PH1 3JJ	3.0%	31	4.0%	23	0.2%	0	3.9%	6	2.0%	2	0.4%	1
Glendoick Garden Centre, A90, Perth, PH2 7NS	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Greenhill Garden Nursery, Tibbermore, Perth, PH1 1QN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Perth Road, Blairgowrie, PH10 6FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Straiton Road, Loanhead, Edinburgh, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Jamesfield Garden Centre, Abernethy, Perth, KY14 6EW	0.5%	5	0.6%	3	1.8%	2	0.0%	0	0.0%	0	0.0%	0
Linden Garden Centre, Glencarse, Perth, PH2 7LX	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glasgow Road, Perth, PH2 0NZ	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Ruthvenfield Road, Perth, PH1 3EE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Stenhouse Street, Cowdenbeath, KY4 9DG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Stack Retail Park, Dundee, DD2 3XN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Kirkton), Derwent Avenue, Dundee, DD3 0SZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Milton), Milton Of Craigie Road, Dundee, DD4 7RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee West), Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Glenrothes), Fullerton Road, Glenrothes, KY7 5QB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Perth), Dunkeld Road, Perth, PH1 5AP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Lidl, High Street, Cowdenbeath, KY4 9FF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, MacAlpine Road, Dundee, DD3 9HU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Perth Road, Blairgowrie, PH10 6FW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Riggs Road, Perth, PH1 1PR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, South Road, Lochee, Dundee, DD2 3EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Afton Way, Dundee, DD4 8BR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Caledonian Road, Perth, PH1 5XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Flemington Road, Glenrothes, KY7 5QS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Main Street, Cowdenbeath, KY4 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Station Road, Kinross, KY13 8FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Tom Johnston Road, Dundee, DD4 8XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crieff Road, Perth, PH1 2NR	0.5%	5	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, South Road, Dundee, DD2 4SR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / delivery	17.5%	178	18.1%	104	22.5%	19	4.5%	6	9.9%	8	31.0%	41
Aberdeen City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Affinity Sterling Mills Outlet Shopping, The Devon Way, Tillicoultry, FK13 6HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, South Road, Cupar, KY15 5JE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alloa Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arran House Business Park, Arran Road, Perth, PH1 3DZ	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Carberry Road, Kirkcaldy, KY1 3NU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Halbeath Road Retail Park, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Muirend Road, Portlethen, Aberdeen, AB12 4XP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, New Road, Forfar, DD8 2AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashbrook Nursery Garden Centre, Forfar Road, Arbroath, DD11 3RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Auchtermuchty Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Academy Street, Forfar, DD8 2XF	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
B&M (with Garden Centre), Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Fife Central Retail Park, Kirkcaldy, KY2 6QL	0.5%	5	0.0%	0	6.5%	5	0.0%	0	0.0%	0	0.0%	0
Bannerman Decorators, Dunkeld Road, Perth, PH1 5RW	0.2%	2	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bennybeg Plant Centre, Muthill Road, Crieff, PH7	0.5%	5	0.0%	0	0.0%	0	3.4%	5	0.4%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
4HN												
Berwick-upon-Tweed Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allan Town Centre	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Bridgend Garden Centre, Ladybank Road, Freuchie, Cupar, KY15 7HY	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughty Ferry Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buick Furniture, Charleton Road, Montrose, DD10 9EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burghmuir Retail Park, Burghmuir Road, Stirling, FK7 7GX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cadham Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Drive Retail Park, Dunfermline, KY12 7AU	0.4%	4	0.0%	0	4.8%	4	0.0%	0	0.0%	0	0.0%	0
Carnegie Leisure Centre, Pilmuir Street, Dunfermline, KY12 0QE	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Carpet Discount Store, Riverview Industrial Park, Friarton Road, Perth, PH2 8BB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Catherines Retail Park, Perth, PH1 5XA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Causewayhead Road, Stirling, FK9 5EY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Retail Park, Grahams Road, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comfort Store, Ferryhill Road, Inverkeithing, KY11 1HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Arnhall Business Park, Endeavour Drive, Westhill, AB32 6UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Costkea Way, Loanhead, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, St Rollox Business Park, Springburn, Glasgow, G21 1YX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Davidsons Chemists, Anderson Street, Dunblane, FK15 9AJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DFS, Milton Link, Newcraighall, Edinburgh, EH15 3QH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.2%	2	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0
Dobbies Garden Centre, Fife Leisure Park, Dunfermline, KY11 8EX	0.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.3%	3	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0
Dunshalt Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkirk Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ferngreen Garden Centre, Kirriemuir Road, Forfar, DD8 3TG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.2%	2	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Fife Leisure Park, Whimbrell Place, Dunfermline, KY11 8EX	0.2%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	3
Gatehouse Nursery, A826, Aberfeldy, PH15 2EL	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	1	0.0%	0
Glenburn Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Glenearn The Flooring Store, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gyle Shopping Centre, Gyle Avenue, Edinburgh, EH12 9JY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halbeath Retail Park, Halbeath Road, Dunfermline, KY11 4LP	0.5%	5	0.0%	0	5.6%	5	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Glasgow Road, Stirling, FK7 8ER	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Myre Road, Forfar, DD8 1AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Improvements, Coupar Angus Road, Blairgowrie, PH10 6JR	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Houseproud Home Improvement Centre, Perth Road, Crieff, PH7 3EB	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
IKEA, Braehead Shopping Centre, Glasgow, G51 4FB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
John Smith Business Park, Begg Road, Kirkcaldy, KY2 6HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Garden Centre, A921, Kirkcaldy, KY1 3NZ	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Leslie Village Centre	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Letham Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Magnet Trade, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MKM Building Supplies Perth, Glenearn Road, Perth, PH2 0NJ	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moyness Nurseries, Coupar Angus Road, Blairgowrie, PH10 6UT	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2
Muirhead Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muthill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newburgh Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peebles Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rejects Department Store, St Clair Street, Kirkcaldy, KY1 2BS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rosemount Local Centre, Blairgowrie	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Drip Road, Stirling, FK8 1RA	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Scottish Antique & Arts Centre, Abernyte Road, Abernyte, PH14 9SJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Dryburgh Industrial Estate, Dundee, DD2 3QQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Screwfix, Pitreavie Industrial Estate, Dunfermline, KY11 8UX	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Queenswell Road, Forfar, DD8 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Sterling Furniture, Moss	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Road, Tillicoultry, FK13 6NS												
Sterling Furniture, South Road, Lochee, Dundee, DD2 4SR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Home, Kingseat Road, Dunfermline, KY11 8PQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stewart's Building Services, West Third, Auchterarder, PH3 1NJ	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0
Straiton Retail Park, Straiton Mains, Straiton, EH20 9PW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Auld Brig Road, Alloa, FK10 1EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Turnstone Road, Dunfermline, KY11 8EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Forfar, DD8 3HX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Tesco Superstore, Central Retail Park, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Springfield Terrace, Dunblane, FK15 9AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Wallace Street, Stirling, FK8 1NP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Welton Road, Blairgowrie, PH10 6NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
The Centre Livingston, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tillicoultry Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Travis Perkins, Dunkeld Road, Perth, PH1 3AA	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Webster Building Supplies, Stirling Road, Milnathort, KY13 9XR	0.1%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Whittons Flooring, Lochside Road, Forfar, DD8 3JD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.9%	20	1.6%	9	2.9%	2	1.1%	2	4.1%	3	2.3%	3
(Don't do this type of shopping)	8.1%	82	6.9%	40	6.6%	6	11.1%	16	9.9%	8	9.7%	13
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Q13 Where does your household do most of its shopping for chemists and medical goods, cosmetics and other beauty products?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aberfeldy Town Centre	1.8%	19	0.0%	0	0.0%	0	0.0%	0	23.1%	19	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	8
Auchterarder Town Centre	2.7%	27	0.9%	5	0.5%	0	15.2%	22	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	3.7%	37	2.2%	12	0.0%	0	0.0%	0	0.0%	0	18.9%	25
Bridge of Earn Town Centre (aka 'The Brig')	1.2%	12	2.1%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.4%	4	0.0%	0	0.0%	0	2.8%	4	0.0%	0	0.0%	0
Coupar Angus Town Centre	1.6%	17	0.9%	5	0.0%	0	0.0%	0	0.0%	0	8.7%	11
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	2.2%	23	0.1%	1	0.0%	0	15.4%	22	0.0%	0	0.0%	0
Cupar Town Centre	0.3%	3	0.0%	0	2.9%	2	0.0%	0	0.0%	0	0.2%	0
Dundee City Centre	1.4%	14	1.1%	6	0.0%	0	0.0%	0	0.0%	0	6.1%	8
Dunfermline Town Centre	0.2%	2	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.9%	9	0.0%	0	0.0%	0	0.0%	0	11.0%	9	0.0%	0
Edinburgh City Centre	0.3%	3	0.0%	0	2.2%	2	0.3%	0	0.4%	0	0.0%	0
Errol Village Centre	1.6%	16	2.8%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.8%	8	0.0%	0	9.2%	8	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.6%	6	0.0%	0	0.0%	0	3.8%	5	0.9%	1	0.0%	0
Kinross Town Centre	1.2%	12	0.7%	4	10.1%	8	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.2%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.2%	2	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.4%	4	0.4%	2	2.2%	2	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	25.2%	255	38.9%	223	5.4%	5	12.3%	17	8.9%	7	1.8%	2
Pitlochry Town Centre	2.8%	28	0.0%	0	0.0%	0	0.0%	0	35.2%	28	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	1.2%	13	2.2%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	1.6%	16	0.0%	0	0.0%	0	11.3%	16	0.0%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country Store)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	1.1%	11	1.8%	11	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren Kitchens & more)	0.4%	4	0.0%	0	0.0%	0	2.5%	4	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	0.9%	9	1.2%	7	0.0%	0	0.0%	0	3.0%	2	0.0%	0
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, King's Cross Road, Dundee, DD2 3PT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Crieff Road, Perth, PH1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cashmere at Lochleven, Lochleven Mills, Kinross, KY13 8DH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Cupar, KY15 4RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Turfhills, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Plant Centre, Muthill Road, Crieff, PH7 4HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre Perth, Huntingtower Park, Crieff Road, Perth, PH1 3JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glendoick Garden Centre, A90, Perth, PH2 7NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenhill Garden Nursery, Tibbermore, Perth, PH1 1QN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Perth Road, Blairgowrie, PH10 6FH	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
IKEA, Straiton Road, Loanhead, Edinburgh, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Jamesfield Garden Centre, Abernethy, Perth, KY14 6EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Linden Garden Centre, Glencarse, Perth, PH2 7LX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Broich Road, Crieff, PH7 3SE	0.1%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
Aldi, Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glasgow Road, Perth, PH2 0NZ	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Myrekirk Road, Dundee, DD2 4WB	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Ruthvenfield Road, Perth, PH1 3EE	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Stenhouse Street, Cowdenbeath, KY4 9DG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Stack Retail Park, Dundee, DD2 3XN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Kirkton), Derwent Avenue, Dundee, DD3 0SZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Milton), Milton Of Craigie Road, Dundee, DD4 7RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee West), Myrekirk Road, Dundee, DD2 4WB	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Asda (Glenrothes), Fullerton Road, Glenrothes, KY7 5QB	0.2%	2	0.0%	0	2.3%	2	0.0%	0	0.0%	0	0.0%	0
Asda (Perth), Dunkeld Road, Perth, PH1 5AP	1.8%	19	2.8%	16	0.0%	0	0.3%	0	3.0%	2	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Lidl, High Street, Cowdenbeath, KY4 9FF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, MacAlpine Road, Dundee, DD3 9HU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Perth Road, Blairgowrie, PH10 6FW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Lidl, Riggs Road, Perth, PH1 1PR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, South Road, Lochee, Dundee, DD2 3EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Afton Way, Dundee, DD4 8BR	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2
Morrisons, Caledonian Road, Perth, PH1 5XD	0.5%	5	0.7%	4	0.0%	0	0.6%	1	0.0%	0	0.5%	1
Morrisons, Flemington Road, Glenrothes, KY7 5QS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Main Street, Cowdenbeath, KY4 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Station Road, Kinross, KY13 8FH	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Tom Johnston Road, Dundee, DD4 8XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crieff Road, Perth, PH1 2NR	3.7%	38	5.8%	33	0.0%	0	2.7%	4	0.9%	1	0.0%	0
Tesco Extra, South Road, Dundee, DD2 4SR	0.1%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	2.1%	21	3.4%	20	0.6%	0	0.3%	0	0.4%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.1%	1	0.0%	0	0.0%	0	0.3%	0	0.4%	0	0.0%	0
Internet / delivery	20.1%	204	20.8%	119	28.7%	24	6.4%	9	6.9%	6	34.8%	46
Aberdeen City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Affinity Sterling Mills Outlet Shopping, The Devon Way, Tillicoultry, FK13 6HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, South Road, Cupar, KY15 5JE	0.3%	3	0.3%	2	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Alloa Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arran House Business Park, Arran Road, Perth, PH1 3DZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Carberry Road, Kirkcaldy, KY1 3NU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Halbeath Road Retail Park, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Muirend Road, Portlethen, Aberdeen, AB12 4XP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, New Road, Forfar, DD8 2AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ashbrook Nursery Garden Centre, Forfar Road, Arbroath, DD11 3RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchtermuchty Town Centre	0.1%	1	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Academy Street, Forfar, DD8 2XF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Fife Central Retail Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannerman Decorators, Dunkeld Road, Perth, PH1 5RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bennybeg Plant Centre, Muthill Road, Crieff, PH7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
4HN												
Berwick-upon-Tweed Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allan Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Garden Centre, Ladybank Road, Freuchie, Cupar, KY15 7HY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Local Centre, Perth	0.3%	3	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughty Ferry Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Buick Furniture, Charleton Road, Montrose, DD10 9EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burghmuir Retail Park, Burghmuir Road, Stirling, FK7 7GX	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Cadham Local Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.5%	6	0.0%	0	6.6%	6	0.0%	0	0.0%	0	0.0%	0
Carnegie Drive Retail Park, Dunfermline, KY12 7AU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Leisure Centre, Pilmuir Street, Dunfermline, KY12 0QE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carpet Discount Store, Riverview Industrial Park, Friarton Road, Perth, PH2 8BB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Catherines Retail Park, Perth, PH1 5XA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Causewayhead Road, Stirling, FK9 5EY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Retail Park, Grahams Road, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comfort Store, Ferryhill Road, Inverkeithing, KY11 1HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Arnhall Business Park, Endeavour Drive, Westhill, AB32 6UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Costkea Way, Loanhead, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, St Rollox Business Park, Springburn, Glasgow, G21 1YX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Davidsons Chemists, Anderson Street, Dunblane, FK15 9AJ	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
DFS, Milton Link, Newcraighall, Edinburgh, EH15 3QH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Fife Leisure Park, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	1.9%	19	0.0%	0	0.0%	0	13.6%	19	0.0%	0	0.0%	0
Dunshalt Village Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Falkirk Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Ferngreen Garden Centre, Kirriemuir Road, Forfar, DD8 3TG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Fife Leisure Park, Whimbrell Place, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	15
Gatehouse Nursery, A826, Aberfeldy, PH15 2EL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenburn Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Glenearn The Flooring Store, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Gyle Shopping Centre, Gyle Avenue, Edinburgh, EH12 9JY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halbeath Retail Park, Halbeath Road, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Glasgow Road, Stirling, FK7 8ER	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Home Bargains, Myre Road, Forfar, DD8 1AZ	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Home Improvements, Coupar Angus Road, Blairgowrie, PH10 6JR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Houseproud Home Improvement Centre, Perth Road, Crieff, PH7 3EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Braehead Shopping Centre, Glasgow, G51 4FB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
John Smith Business Park, Begg Road, Kirkcaldy, KY2 6HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.6%	6	0.0%	0	7.3%	6	0.0%	0	0.0%	0	0.0%	0
Kinglassie Town Centre	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Garden Centre, A921, Kirkcaldy, KY1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Leslie Village Centre	0.2%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0
Letham Local Centre, Perth	0.9%	9	1.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Magnet Trade, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MKM Building Supplies Perth, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moyness Nurseries, Coupar Angus Road, Blairgowrie, PH10 6UT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muirhead Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2
Muthill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newburgh Town Centre	1.0%	10	1.2%	7	4.4%	4	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peebles Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rejects Department Store, St Clair Street, Kirkcaldy, KY1 2BS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rosemount Local Centre, Blairgowrie	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Drip Road, Stirling, FK8 1RA	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Scottish Antique & Arts Centre, Abernyte Road, Abernyte, PH14 9SJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Dryburgh Industrial Estate, Dundee, DD2 3QQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Pitreavie Industrial Estate, Dunfermline, KY11 8UX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Queenswell Road, Forfar, DD8 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Furniture, Moss	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Road, Tillicoultry, FK13 6NS												
Sterling Furniture, South Road, Lochee, Dundee, DD2 4SR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Home, Kingseat Road, Dunfermline, KY11 8PQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stewart's Building Services, West Third, Auchterarder, PH3 1NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Straiton Retail Park, Straiton Mains, Straiton, EH20 9PW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Auld Brig Road, Alloa, FK10 1EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Turnstone Road, Dunfermline, KY11 8EG	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Forfar, DD8 3HX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Central Retail Park, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Springfield Terrace, Dunblane, FK15 9AE	0.3%	3	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0
Tesco Superstore, Wallace Street, Stirling, FK8 1NP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Welton Road, Blairgowrie, PH10 6NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
The Centre Livingston, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tillicoultry Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Travis Perkins, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Webster Building Supplies, Stirling Road, Milnathort, KY13 9XR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whittons Flooring, Lochside Road, Forfar, DD8 3JD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.8%	19	2.2%	13	0.8%	1	1.9%	3	1.3%	1	1.1%	2
(Don't do this type of shopping)	2.8%	29	2.2%	13	2.1%	2	5.5%	8	4.0%	3	2.4%	3
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Q14 Where does your household do most of its shopping for books, jewellery, watches, china, glassware, kitchen utensils, recreational and luxury goods?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aberfeldy Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	5.1%	4	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	1.2%	12	1.0%	6	0.0%	0	0.0%	0	0.4%	0	4.5%	6
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.2%	2	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0
Cupar Town Centre	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	2.3%	23	1.2%	7	2.3%	2	0.0%	0	0.9%	1	10.7%	14
Dunfermline Town Centre	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Edinburgh City Centre	0.4%	4	0.1%	1	2.4%	2	0.3%	0	0.9%	1	0.0%	0
Errol Village Centre	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.5%	5	0.0%	0	0.0%	0	3.6%	5	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.3%	3	0.0%	0	3.1%	3	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.3%	3	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0
Kinross Town Centre	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	19.7%	200	26.6%	153	10.5%	9	14.0%	20	17.8%	14	3.0%	4
Pitlochry Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	4.9%	4	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	1.2%	12	0.0%	0	0.0%	0	8.4%	12	0.0%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country Store)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Kitchens & more)												
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	3.2%	32	4.4%	25	0.2%	0	2.8%	4	0.8%	1	1.5%	2
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2
B&M (with Garden Centre), Broich Road, Crieff, PH7 3SE	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
B&Q, King's Cross Road, Dundee, DD2 3PT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Crieff Road, Perth, PH1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cashmere at Lochleven, Lochleven Mills, Kinross, KY13 8DH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Cupar, KY15 4RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre, Turfhills, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Plant Centre, Muthill Road, Crieff, PH7 4HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre Perth, Huntingtower Park, Crieff Road, Perth, PH1 3JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glendoick Garden Centre, A90, Perth, PH2 7NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Greenhill Garden Nursery, Tibbermore, Perth, PH1 1QN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Perth Road, Blairgowrie, PH10 6FH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Straiton Road, Loanhead, Edinburgh, EH20 9BY	0.2%	2	0.0%	0	1.7%	1	0.0%	0	0.4%	0	0.0%	0
Jamesfield Garden Centre, Abernethy, Perth, KY14 6EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Linden Garden Centre, Glencarse, Perth, PH2 7LX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Broich Road, Crieff, PH7 3SE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Glasgow Road, Perth, PH2 0NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Ruthvenfield Road, Perth, PH1 3EE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, Stenhouse Street, Cowdenbeath, KY4 9DG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, The Stack Retail Park, Dundee, DD2 3XN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Kirkton), Derwent Avenue, Dundee, DD3 0SZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee Milton), Milton Of Craigie Road, Dundee, DD4 7RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Dundee West), Myrekirk Road, Dundee, DD2 4WB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Glenrothes), Fullerton Road, Glenrothes, KY7 5QB	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Asda (Perth), Dunkeld Road,	0.7%	8	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Perth, PH1 5AP												
Lidl, High Street, Cowdenbeath, KY4 9FF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Leslie Road, Glenrothes, KY7 5PS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, MacAlpine Road, Dundee, DD3 9HU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Perth Road, Blairgowrie, PH10 6FW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Riggs Road, Perth, PH1 1PR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, South Road, Lochee, Dundee, DD2 3EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Afton Way, Dundee, DD4 8BR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Caledonian Road, Perth, PH1 5XD	0.1%	1	0.1%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Flemington Road, Glenrothes, KY7 5QS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Main Street, Cowdenbeath, KY4 8LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Station Road, Kinross, KY13 8FH	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Tom Johnston Road, Dundee, DD4 8XD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Crieff Road, Perth, PH1 2NR	1.2%	13	1.8%	10	0.0%	0	0.5%	1	0.8%	1	0.5%	1
Tesco Extra, South Road, Dundee, DD2 4SR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.5%	5	0.7%	4	1.4%	1	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.3%	3	0.3%	2	0.6%	0	0.3%	0	0.0%	0	0.2%	0
Internet / delivery	41.4%	420	41.7%	239	45.2%	38	32.6%	47	36.7%	30	50.5%	66
Aberdeen City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Affinity Sterling Mills Outlet Shopping, The Devon Way, Tillicoultry, FK13 6HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aldi, South Road, Cupar, KY15 5JE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alloa Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Arran House Business Park, Arran Road, Perth, PH1 3DZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Carberry Road, Kirkcaldy, KY1 3NU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Halbeath Road Retail Park, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Muirend Road, Portlethen, Aberdeen, AB12 4XP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Asda, New Road, Forfar, DD8 2AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Ashbrook Nursery Garden Centre, Forfar Road, Arbroath, DD11 3RB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchtermuchty Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Academy Street, Forfar, DD8 2XF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&M (with Garden Centre), Flemington Road, Glenrothes, KY7 5QF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Fife Central Retail Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannerman Decorators, Dunkeld Road, Perth, PH1 5RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bennybeg Plant Centre,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Muthill Road, Crieff, PH7 4HN												
Berwick-upon-Tweed Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allan Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Garden Centre, Ladybank Road, Freuchie, Cupar, KY15 7HY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridgend Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broughty Ferry Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buick Furniture, Charleton Road, Montrose, DD10 9EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burghmuir Retail Park, Burghmuir Road, Stirling, FK7 7GX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cadham Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Drive Retail Park, Dunfermline, KY12 7AU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carnegie Leisure Centre, Pilmuir Street, Dunfermline, KY12 0QE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carpet Discount Store, Riverview Industrial Park, Friarton Road, Perth, PH2 8BB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Catherines Retail Park, Perth, PH1 5XA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Causewayhead Road, Stirling, FK9 5EY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central Retail Park, Grahams Road, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comfort Store, Ferryhill Road, Inverkeithing, KY11 1HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Arnhall Business Park, Endeavour Drive, Westhill, AB32 6UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, Costkea Way, Loanhead, EH20 9BY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costco, St Rollox Business Park, Springburn, Glasgow, G21 1YX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Davidsons Chemists, Anderson Street, Dunblane, FK15 9AJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DFS, Milton Link, Newcraighall, Edinburgh, EH15 3QH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Fife Leisure Park, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.5%	5	0.0%	0	0.0%	0	3.6%	5	0.0%	0	0.0%	0
Dunshalt Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkirk Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ferngreen Garden Centre, Kirriemuir Road, Forfar, DD8 3TG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Leisure Park, Whimbrell Place, Dunfermline, KY11 8EX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3
Gatehouse Nursery, A826, Aberfeldy, PH15 2EL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Glenburn Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenearn The Flooring Store, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gyle Shopping Centre, Gyle Avenue, Edinburgh, EH12 9JY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Halbeath Retail Park, Halbeath Road, Dunfermline, KY11 4LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Glasgow Road, Stirling, FK7 8ER	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains, Myre Road, Forfar, DD8 1AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Improvements, Coupar Angus Road, Blairgowrie, PH10 6JR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Houseproud Home Improvement Centre, Perth Road, Crieff, PH7 3EB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
IKEA, Braehead Shopping Centre, Glasgow, G51 4FB	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
John Smith Business Park, Begg Road, Kirkcaldy, KY2 6HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Garden Centre, A921, Kirkcaldy, KY1 3NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leslie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Letham Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Magnet Trade, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MKM Building Supplies Perth, Glenearn Road, Perth, PH2 0NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moyness Nurseries, Coupar Angus Road, Blairgowrie, PH10 6UT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muirhead Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Muthill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Newburgh Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peebles Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rejects Department Store, St Clair Street, Kirkcaldy, KY1 2BS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rosemount Local Centre, Blairgowrie	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Superstore, Drip Road, Stirling, FK8 1RA	0.1%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Scottish Antique & Arts Centre, Abernyte Road, Abernyte, PH14 9SJ	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Screwfix, Dryburgh Industrial Estate, Dundee, DD2 3QQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Pitreavie Industrial Estate, Dunfermline, KY11 8UX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Screwfix, Queenswell Road, Forfar, DD8 3JA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Sterling Furniture, Moss Road, Tillicoultry, FK13 6NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Furniture, South Road, Lochee, Dundee, DD2 4SR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sterling Home, Kingseat Road, Dunfermline, KY11 8PQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stewart's Building Services, West Third, Auchterarder, PH3 1NJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Straiton Retail Park, Straiton Mains, Straiton, EH20 9PW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Auld Brig Road, Alloa, FK10 1EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Turnstone Road, Dunfermline, KY11 8EG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Castle Street, Forfar, DD8 3HX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Tesco Superstore, Central Retail Park, Falkirk, FK1 1LW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Springfield Terrace, Dunblane, FK15 9AE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Wallace Street, Stirling, FK8 1NP	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Tesco Superstore, Welton Road, Blairgowrie, PH10 6NQ	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.2%	0
The Centre Livingston, Almondvale Avenue, Livingston, EH54 6QX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tillicoultry Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Travis Perkins, Dunkeld Road, Perth, PH1 3AA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Webster Building Supplies, Stirling Road, Milnathort, KY13 9XR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Whittons Flooring, Lochside Road, Forfar, DD8 3JD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.4%	24	1.9%	11	8.8%	7	2.0%	3	0.4%	0	2.1%	3
(Don't do this type of shopping)	19.8%	201	17.3%	99	18.3%	15	24.2%	35	28.8%	23	21.2%	28
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Meanscore: [Number of visits per week]

Q15 How often do you visit the following centres, on average? [PR]
Perth City Centre

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	4.4%	45	7.8%	45	0.0%	0	0.0%	0	0.0%	0	0.0%	0
4-6 times a week	3.7%	38	6.6%	38	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 times a week	9.9%	101	16.6%	95	2.5%	2	1.7%	2	0.0%	0	0.7%	1
Once a week	16.9%	171	21.7%	125	13.1%	11	9.5%	14	16.0%	13	6.8%	9
2-3 times a month	13.6%	137	15.1%	87	15.4%	13	15.3%	22	9.6%	8	6.2%	8
Once a month	16.7%	170	16.5%	95	21.4%	18	16.0%	23	21.2%	17	12.9%	17
Less often	22.8%	230	11.5%	66	26.3%	22	30.3%	43	42.2%	34	49.4%	65
Never	11.0%	112	2.7%	15	21.3%	18	27.0%	39	10.6%	9	23.8%	31
(Don’t know/varies)	0.9%	9	1.5%	8	0.0%	0	0.3%	0	0.4%	0	0.2%	0
Mean:		*1.05*		*1.65*		*0.35*		*0.28*		*0.31*		*0.20*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Column %ges.

Perth & Kinross Household Survey for CPW Planning

Kinross Town Centre

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	1.3%	13	0.0%	0	15.6%	13	0.0%	0	0.0%	0	0.0%	0
4-6 times a week	0.6%	6	0.0%	0	6.8%	6	0.0%	0	0.0%	0	0.0%	0
2-3 times a week	1.3%	13	1.0%	6	9.2%	8	0.0%	0	0.0%	0	0.0%	0
Once a week	2.3%	23	1.6%	9	16.0%	13	0.3%	0	0.0%	0	0.2%	0
2-3 times a month	0.7%	7	0.9%	5	1.9%	2	0.0%	0	0.0%	0	0.0%	0
Once a month	1.9%	20	1.7%	10	6.7%	6	0.3%	0	4.6%	4	0.0%	0
Less often	16.1%	163	17.1%	98	9.7%	8	8.7%	12	4.9%	4	31.1%	41
Never	74.8%	758	76.1%	437	34.0%	29	90.2%	129	90.5%	73	68.7%	90
(Don’t know/varies)	1.0%	10	1.6%	9	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Mean:		*0.20*		*0.07*		*1.86*		*0.01*		*0.02*		*0.03*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Crieff Town Centre

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	0.7%	7	0.9%	5	0.0%	0	1.2%	2	0.0%	0	0.0%	0
4-6 times a week	0.5%	5	0.0%	0	0.0%	0	3.6%	5	0.0%	0	0.0%	0
2-3 times a week	0.8%	8	0.0%	0	0.0%	0	5.9%	8	0.0%	0	0.0%	0
Once a week	2.8%	29	0.7%	4	0.0%	0	15.0%	21	2.1%	2	1.5%	2
2-3 times a month	2.3%	23	1.9%	11	0.0%	0	6.7%	10	2.8%	2	0.0%	0
Once a month	2.5%	26	1.3%	8	3.2%	3	8.4%	12	3.7%	3	0.2%	0
Less often	24.3%	246	23.7%	136	23.6%	20	23.1%	33	14.5%	12	34.6%	45
Never	65.1%	659	70.0%	402	72.9%	61	35.4%	50	76.9%	62	63.4%	83
(Don’t know/varies)	1.0%	10	1.5%	8	0.2%	0	0.8%	1	0.0%	0	0.2%	0
Mean:		*0.16*		*0.11*		*0.03*		*0.64*		*0.06*		*0.05*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Auchterarder Town Centre

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	1.2%	12	0.7%	4	0.0%	0	5.7%	8	0.0%	0	0.0%	0
4-6 times a week	0.4%	4	0.0%	0	0.0%	0	2.9%	4	0.0%	0	0.0%	0
2-3 times a week	2.7%	28	1.7%	9	0.0%	0	12.8%	18	0.0%	0	0.0%	0
Once a week	1.6%	16	1.1%	6	0.0%	0	6.7%	10	0.4%	0	0.0%	0
2-3 times a month	1.2%	12	1.7%	9	0.0%	0	1.9%	3	0.0%	0	0.0%	0
Once a month	1.7%	18	0.9%	5	2.5%	2	6.8%	10	0.0%	0	0.5%	1
Less often	18.7%	189	17.9%	103	22.9%	19	16.5%	24	5.1%	4	30.1%	40
Never	71.1%	721	74.3%	427	74.6%	63	44.8%	64	94.1%	76	69.4%	91
(Don’t know/varies)	1.3%	13	1.8%	10	0.0%	0	2.0%	3	0.4%	0	0.0%	0
Mean:		*0.22*		*0.13*		*0.03*		*0.99*		*0.01*		*0.03*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Aberfeldy Town Centre

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	0.9%	9	0.0%	0	0.0%	0	0.0%	0	10.9%	9	0.0%	0
4-6 times a week	0.3%	3	0.0%	0	0.0%	0	0.6%	1	2.4%	2	0.0%	0
2-3 times a week	1.0%	10	0.0%	0	0.0%	0	0.0%	0	12.7%	10	0.0%	0
Once a week	0.4%	4	0.0%	0	0.0%	0	0.3%	0	4.2%	3	0.0%	0
2-3 times a month	0.8%	8	0.7%	4	0.0%	0	0.6%	1	3.8%	3	0.0%	0
Once a month	1.7%	17	0.1%	1	0.0%	0	4.6%	7	11.5%	9	0.7%	1
Less often	23.2%	235	21.6%	124	25.1%	21	17.6%	25	22.0%	18	35.7%	47
Never	70.6%	715	76.1%	437	74.9%	63	74.2%	106	32.6%	26	63.4%	83
(Don’t know/varies)	1.2%	12	1.5%	8	0.0%	0	2.0%	3	0.0%	0	0.2%	0
Mean:		*0.14*		*0.03*		*0.03*		*0.07*		*1.31*		*0.04*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Pitlochry Town Centre

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	1.6%	16	0.9%	5	0.0%	0	0.0%	0	13.4%	11	0.0%	0
4-6 times a week	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0
2-3 times a week	1.2%	12	0.7%	4	0.0%	0	0.0%	0	10.5%	8	0.0%	0
Once a week	1.7%	18	0.0%	0	0.2%	0	1.6%	2	18.7%	15	0.0%	0
2-3 times a month	0.8%	8	0.5%	3	0.2%	0	0.0%	0	5.9%	5	0.0%	0
Once a month	2.8%	28	1.9%	11	2.8%	2	1.4%	2	12.5%	10	2.3%	3
Less often	29.7%	300	29.0%	167	37.9%	32	20.2%	29	12.7%	10	48.0%	63
Never	61.0%	618	65.6%	377	58.6%	49	76.2%	109	23.1%	19	49.3%	65
(Don’t know/varies)	1.0%	10	1.5%	8	0.2%	0	0.6%	1	0.0%	0	0.4%	1
Mean:		*0.21*		*0.12*		*0.05*		*0.04*		*1.62*		*0.06*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Column %ges.

Perth & Kinross Household Survey for CPW Planning

Blairgowrie Town Centre

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	8
4-6 times a week	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
2-3 times a week	2.2%	22	0.7%	4	0.0%	0	0.0%	0	0.4%	0	13.6%	18
Once a week	2.0%	21	0.6%	4	0.6%	0	0.0%	0	1.7%	1	11.6%	15
2-3 times a month	2.0%	21	2.2%	13	0.0%	0	0.0%	0	2.9%	2	4.3%	6
Once a month	4.3%	43	3.5%	20	0.5%	0	1.6%	2	7.4%	6	11.0%	14
Less often	23.5%	238	24.5%	141	24.5%	21	9.9%	14	24.2%	20	32.8%	43
Never	64.1%	649	67.0%	385	74.5%	63	87.9%	125	63.3%	51	19.3%	25
(Don’t know/varies)	1.0%	10	1.5%	8	0.0%	0	0.6%	1	0.0%	0	0.2%	0
Mean:		*0.18*		*0.07*		*0.03*		*0.02*		*0.09*		*1.02*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Alyth Town Centre

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3
4-6 times a week	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
2-3 times a week	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	5
Once a week	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	5
2-3 times a month	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Once a month	0.9%	10	0.3%	1	0.0%	0	0.0%	0	0.0%	0	6.2%	8
Less often	14.8%	150	14.2%	82	15.7%	13	3.1%	4	3.8%	3	36.6%	48
Never	81.5%	826	83.6%	480	84.3%	71	96.3%	137	96.2%	78	45.4%	60
(Don’t know/varies)	1.3%	13	1.9%	11	0.0%	0	0.6%	1	0.0%	0	0.7%	1
Mean:		*0.06*		*0.02*		*0.02*		*0.00*		*0.00*		*0.38*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Coupar Angus Town Centre

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	6
4-6 times a week	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
2-3 times a week	1.0%	10	0.8%	5	0.0%	0	0.0%	0	0.0%	0	4.0%	5
Once a week	1.0%	11	0.3%	1	0.0%	0	0.0%	0	0.0%	0	6.9%	9
2-3 times a month	1.1%	11	1.5%	9	1.4%	1	0.0%	0	0.0%	0	0.7%	1
Once a month	1.5%	15	1.2%	7	0.0%	0	0.0%	0	0.0%	0	6.0%	8
Less often	15.3%	155	14.8%	85	18.9%	16	3.7%	5	6.7%	5	33.6%	44
Never	78.2%	793	79.7%	458	79.7%	67	95.7%	137	93.3%	75	42.8%	56
(Don’t know/varies)	1.1%	11	1.8%	10	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Mean:		*0.11*		*0.05*		*0.03*		*0.00*		*0.01*		*0.61*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Dunkeld and Birnam Town Centre

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	0.3%	3	0.0%	0	0.0%	0	0.0%	0	3.7%	3	0.0%	0
4-6 times a week	0.2%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0
2-3 times a week	1.2%	12	1.7%	10	0.0%	0	0.0%	0	3.1%	2	0.0%	0
Once a week	0.9%	9	0.5%	3	0.0%	0	1.6%	2	4.7%	4	0.0%	0
2-3 times a month	1.4%	14	2.1%	12	0.0%	0	0.0%	0	2.5%	2	0.2%	0
Once a month	3.3%	33	4.7%	27	0.5%	0	0.3%	0	3.6%	3	2.1%	3
Less often	27.6%	280	27.0%	155	28.7%	24	19.2%	27	22.1%	18	42.5%	56
Never	63.9%	647	62.5%	359	70.8%	59	78.3%	112	57.3%	46	53.9%	71
(Don’t know/varies)	1.2%	12	1.5%	8	0.0%	0	0.6%	1	0.8%	1	1.3%	2
Mean:		*0.11*		*0.10*		*0.03*		*0.04*		*0.54*		*0.05*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Q16 Now thinking about ALL centres, including the ones previously mentioned - Which centre does your household visit most often for shopping and services?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Aberfeldy Town Centre	1.9%	19	0.0%	0	0.0%	0	1.6%	2	21.1%	17	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Auchterarder Town Centre	1.7%	17	0.3%	2	0.0%	0	10.6%	15	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Blairgowrie Town Centre	5.2%	52	2.1%	12	0.6%	0	0.0%	0	0.0%	0	30.5%	40
Bridge of Earn Town Centre	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.6%	6	0.8%	5	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	3.6%	36	0.5%	3	1.7%	1	22.1%	32	0.0%	0	0.0%	0
Cupar Town Centre	0.3%	3	0.3%	2	2.1%	2	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	9.1%	92	7.9%	45	0.2%	0	0.0%	0	0.0%	0	35.8%	47
Dunfermline Town Centre	1.1%	11	0.0%	0	10.9%	9	0.0%	0	0.0%	0	1.5%	2
Dunkeld Town Centre	2.1%	21	2.5%	14	0.0%	0	0.0%	0	8.1%	7	0.0%	0
Edinburgh City Centre	1.4%	14	1.9%	11	3.9%	3	0.3%	0	0.0%	0	0.0%	0
Errol Village Centre	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	1.0%	10	1.2%	7	0.0%	0	1.9%	3	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	1.2%	12	0.0%	0	14.4%	12	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	1.9%	20	0.0%	0	23.2%	20	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.4%	4	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre	52.4%	531	75.5%	433	30.6%	26	26.3%	37	33.5%	27	5.8%	8
Pitlochry Town Centre	2.8%	28	0.5%	3	0.5%	0	0.0%	0	30.7%	25	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	3.6%	37	0.0%	0	0.2%	0	25.7%	37	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Alloa Town Centre	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Ballinluig Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Callander Town Centre	0.2%	2	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0
Dunblane Town Centre	0.7%	7	0.0%	0	0.0%	0	5.1%	7	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.3%	20
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Livingston Town Centre	0.1%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling, FK7 7TL	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
St Catherines Retail Park, Perth, PH1 5XA	0.6%	6	0.8%	5	0.0%	0	0.0%	0	1.3%	1	0.0%	0
(Don't know)	1.5%	15	1.6%	9	0.0%	0	2.2%	3	0.8%	1	1.5%	2
(Don't visit ANY centres for shopping or services)	3.3%	33	3.2%	18	4.7%	4	2.0%	3	3.6%	3	3.8%	5
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	

Meanscore: [More often = 1, About the same = 0, Less often = -1]

Q17 Compared to before the Covid-19 pandemic, how frequently do you visit (CENTRE MENTIONED AT Q16) now? [PR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
More often	7.7%	75	5.1%	28	9.3%	7	13.5%	18	5.8%	4	13.0%	16
About the same	55.9%	540	55.7%	304	57.5%	46	49.9%	68	55.9%	43	62.7%	78
Less often	35.4%	341	38.0%	208	33.2%	27	34.8%	48	38.4%	30	23.8%	30
(Don't know)	1.0%	9	1.1%	6	0.0%	0	1.8%	2	0.0%	0	0.5%	1
Mean:		*-0.28*		*-0.33*		*-0.24*		*-0.22*		*-0.33*		*-0.11*
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Q18 How do you normally travel to (CENTRE MENTION AT Q16)?
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Car / van (as driver)	64.9%	626	66.0%	361	71.1%	57	65.0%	89	63.5%	49	57.1%	71
Car / van (as passenger)	9.4%	91	8.2%	45	11.2%	9	14.1%	19	10.6%	8	7.9%	10
Bus, minibus or coach	10.2%	99	10.9%	60	7.6%	6	3.8%	5	6.6%	5	18.3%	23
Motorcycle, scooter or moped	0.1%	1	0.1%	1	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Bicycle	0.7%	7	0.4%	2	1.5%	1	2.3%	3	0.0%	0	0.0%	0
Walk	12.1%	117	11.4%	62	6.8%	5	12.1%	16	17.5%	14	15.3%	19
Train	1.2%	12	1.1%	6	1.9%	2	2.6%	3	1.0%	1	0.0%	0
Taxi	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Mobility scooter / disability vehicle	0.3%	3	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	0.9%	9	1.6%	8	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Q19 What activities do you do when you visit (CENTRE MENTIONED AT Q16)? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Food shopping	50.6%	488	50.8%	278	46.7%	37	43.0%	59	67.3%	52	49.8%	62
Non-food shopping	53.4%	515	51.2%	280	50.6%	40	56.3%	77	56.7%	44	59.9%	74
Services - Financial e.g. bank, building society, cash machine	8.3%	80	8.5%	46	12.7%	10	7.9%	11	6.4%	5	6.7%	8
Services - Health e.g. doctor, dentist, hospital, opticians	8.4%	82	7.1%	39	7.3%	6	11.5%	16	17.9%	14	6.0%	7
Services - Other e.g. laundrette, hairdresser, vets, recycling	6.3%	60	6.6%	36	3.5%	3	8.7%	12	5.2%	4	4.6%	6
Accessing transport (e.g. using bus / tube / train station)	0.4%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buying fuel (visiting petrol station)	1.8%	18	1.7%	9	2.0%	2	0.6%	1	1.8%	1	3.7%	5
Cafes / coffee shops	20.5%	198	22.7%	124	20.0%	16	14.1%	19	22.0%	17	17.4%	22
Cinema	4.0%	38	3.3%	18	11.3%	9	1.5%	2	4.2%	3	4.8%	6
Family entertainment venue (e.g. bowling alley, ice rink, etc.).	0.6%	6	0.5%	3	2.6%	2	0.7%	1	0.4%	0	0.0%	0
Gym / leisure centre / swimming pool	2.7%	26	2.3%	13	1.8%	1	3.5%	5	4.2%	3	3.3%	4
Library	1.1%	10	1.2%	7	0.0%	0	2.4%	3	0.4%	0	0.0%	0
Live music venues / gigs	0.6%	6	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Meeting family / friends in centre	4.6%	44	3.4%	19	9.2%	7	3.9%	5	10.3%	8	3.8%	5
Museums / galleries	0.6%	6	0.3%	2	3.7%	3	0.3%	0	0.0%	0	0.5%	1
Outdoor sports venue (e.g. tennis / basketball court / football / cricket pitch)	1.2%	11	1.2%	6	3.2%	3	0.6%	1	1.0%	1	0.5%	1
Parks / green spaces	0.8%	8	1.2%	7	1.3%	1	0.0%	0	0.4%	0	0.0%	0
Place of worship	1.0%	9	1.0%	6	0.3%	0	1.8%	2	0.8%	1	0.2%	0
Post Office	0.9%	9	0.3%	1	0.5%	0	1.6%	2	0.8%	1	3.2%	4
Pubs / bars	2.6%	25	2.7%	15	4.5%	4	1.5%	2	4.0%	3	1.3%	2
Restaurants	13.4%	129	15.7%	86	13.0%	10	8.5%	12	17.5%	14	6.3%	8
School / college / university	0.6%	6	0.8%	4	0.0%	0	0.0%	0	2.2%	2	0.0%	0
Takeaways / fast food	1.5%	15	1.7%	9	3.8%	3	0.0%	0	0.8%	1	1.6%	2
Theatres / shows	1.2%	12	1.2%	6	3.3%	3	0.9%	1	0.0%	0	1.1%	1
Walk / walk the dog	4.5%	43	5.9%	32	1.9%	1	3.0%	4	1.7%	1	3.1%	4
Window shopping / browsing	10.6%	103	14.2%	78	7.9%	6	7.4%	10	5.3%	4	3.5%	4
Work	5.5%	53	4.7%	26	2.9%	2	7.0%	10	9.4%	7	6.2%	8
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Play bingo	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	2.6%	25	1.7%	9	1.1%	1	0.6%	1	0.0%	0	11.6%	14
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Meanscore: [Time in minutes]

Q20 How long do you normally spend in (CENTRE MENTIONED AT Q16) when visiting?
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Less than 30 mins	6.9%	66	5.3%	29	3.6%	3	9.6%	13	18.3%	14	6.1%	8
30 - 59 mins	14.2%	137	13.4%	73	10.4%	8	17.9%	24	12.3%	9	17.5%	22
1 hour - 1 hour 59 mins	39.9%	385	42.9%	235	38.8%	31	41.0%	56	28.6%	22	32.8%	41
2 hour - 2 hours 59 mins	24.7%	239	27.0%	148	26.7%	21	17.4%	24	17.4%	13	25.9%	32
3 hour - 3 hours 59 mins	4.7%	45	3.1%	17	6.5%	5	2.8%	4	8.6%	7	10.4%	13
4 hours or more	7.1%	69	7.2%	39	10.6%	9	5.5%	7	9.7%	7	4.8%	6
(Don't know / varies)	2.5%	24	1.2%	6	3.4%	3	5.7%	8	5.1%	4	2.5%	3
Mean:		*114.43*		*115.25*		*130.12*		*100.61*		*113.03*		*116.30*
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Q21 What do you like most about (CENTRE MENTIONED AT Q16)? e.g. Why do you choose to visit there? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Close to home / live here	25.1%	243	23.0%	126	16.3%	13	31.7%	43	38.2%	29	25.1%	31
Attractive environment / nice place	11.3%	109	12.5%	68	4.6%	4	14.9%	20	12.9%	10	5.7%	7
Shops - good range of non-food shops generally	9.6%	92	9.7%	53	9.7%	8	11.9%	16	7.2%	6	8.0%	10
Good cafés / restaurants	6.5%	63	8.3%	45	6.0%	5	3.6%	5	2.0%	2	5.2%	6
Can get everything I need there	6.0%	58	6.1%	33	3.7%	3	4.3%	6	3.9%	3	10.1%	13
Good layout / shops close together / easy to get around	5.7%	55	6.9%	38	8.6%	7	4.3%	6	0.4%	0	3.5%	4
Nice atmosphere / friendly people	4.0%	38	1.7%	9	3.6%	3	8.3%	11	10.0%	8	5.7%	7
Familiar / know where everything is	3.6%	35	3.2%	18	4.2%	3	3.6%	5	6.1%	5	3.2%	4
Easy to get to by car	3.5%	34	4.2%	23	4.6%	4	3.5%	5	0.8%	1	1.3%	2
Shops - good range of independent shops	3.3%	31	2.5%	14	1.7%	1	7.1%	10	2.7%	2	3.7%	5
Quiet / not too busy	3.1%	30	3.9%	22	4.6%	4	0.6%	1	2.0%	2	2.3%	3
Close to friends / relatives	2.8%	27	3.9%	21	4.9%	4	0.6%	1	1.7%	1	0.2%	0
Parking - it's easy to find a space	2.8%	27	2.5%	14	2.8%	2	4.9%	7	1.8%	1	2.3%	3
Good pubs / bars	2.2%	22	3.6%	20	1.8%	1	0.0%	0	0.0%	0	0.5%	1
Shops - good food stores	2.0%	19	1.2%	7	3.1%	2	3.7%	5	3.4%	3	2.2%	3
Shops - good range of clothes shops	1.8%	18	2.1%	12	2.4%	2	0.0%	0	0.4%	0	2.9%	4
Shops - good range of affordable shops	1.8%	17	2.1%	12	1.7%	1	0.0%	0	0.0%	0	3.4%	4
Clean streets / well maintained	1.3%	12	1.5%	8	2.1%	2	0.0%	0	0.8%	1	1.4%	2
Close to work / en route to work	1.2%	12	0.6%	3	1.8%	1	1.5%	2	1.0%	1	3.5%	4
Traffic free pedestrian area	1.0%	10	0.7%	4	4.1%	3	1.8%	2	0.0%	0	0.0%	0
Traditional / quaint	0.9%	8	0.7%	4	1.9%	2	0.3%	0	2.5%	2	0.7%	1
Shops - good range of 'high street' retailers	0.8%	8	0.0%	0	3.3%	3	1.5%	2	2.9%	2	0.5%	1
Like to visit the cinema / good cinema	0.8%	7	0.8%	4	1.5%	1	0.0%	0	0.4%	0	1.4%	2
Good for financial services (e.g. banks / building societies)	0.6%	6	0.8%	4	0.3%	0	0.6%	1	0.8%	1	0.0%	0
Good for leisure activities	0.5%	5	0.3%	2	0.8%	1	0.0%	0	0.0%	0	1.8%	2
Has undercover shopping	0.5%	5	0.1%	1	4.3%	3	0.3%	0	0.0%	0	0.0%	0
Feels 'Covid safe'	0.4%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - good opening hours	0.4%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - good range of quality shops	0.4%	4	0.1%	1	1.3%	1	0.7%	1	2.0%	2	0.0%	0
Good range of other services (e.g. library, hairdresser, vets etc.)	0.4%	4	0.3%	1	0.3%	0	0.3%	0	0.8%	1	1.1%	1
Parking - it's free	0.4%	3	0.3%	1	0.0%	0	1.2%	2	0.0%	0	0.2%	0
Easy to get to by public transport	0.3%	3	0.3%	1	0.0%	0	0.3%	0	1.0%	1	0.5%	1
Good for a day out / visiting as a tourist	0.3%	3	0.4%	2	0.3%	0	0.0%	0	0.0%	0	0.0%	0
Parking - it's cheap	0.2%	2	0.3%	2	0.3%	0	0.3%	0	0.0%	0	0.0%	0
Good for cultural activities (e.g. museums, galleries, etc)	0.1%	1	0.1%	1	0.3%	0	0.0%	0	0.0%	0	0.2%	0
Marks & Spencer store	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.4%	0	0.0%	0
Flat	0.1%	1	0.0%	0	0.8%	1	0.3%	0	0.0%	0	0.0%	0
Iceland store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Home Bargains store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Good street entertainment / lots going on	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good security / feel safe	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Has a Park & Ride service	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
(Nothing)	19.1%	184	18.2%	100	15.0%	12	25.7%	35	23.5%	18	15.7%	20
(Don't know)	5.3%	51	4.5%	25	3.1%	2	0.3%	0	3.0%	2	17.4%	22
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Column %ges.

Meanscore: [Good = 1, Average = 0, Poor = -1]

Q22 Overall, how do you rate (CENTRE MENTIONED AT Q16) on the following aspects? [PR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

Range and choice of shops

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Good	20.3%	196	15.6%	85	23.8%	19	25.0%	34	18.8%	15	34.9%	43
Average	47.1%	454	44.7%	245	57.0%	46	51.4%	70	44.9%	35	47.4%	59
Poor	31.4%	303	38.6%	211	17.7%	14	20.8%	28	35.9%	28	17.5%	22
(Don't know)	1.2%	11	1.0%	6	1.5%	1	2.8%	4	0.4%	0	0.2%	0
Mean:		*-0.11*		*-0.23*		*0.06*		*0.04*		*-0.17*		*0.17*
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Quality of shops

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Good	31.6%	305	27.0%	147	29.0%	23	37.6%	51	38.8%	30	42.6%	53
Average	51.9%	501	54.4%	297	54.0%	43	51.3%	70	46.2%	36	43.8%	54
Poor	14.7%	142	17.2%	94	14.7%	12	8.0%	11	12.5%	10	12.4%	15
(Don't know)	1.8%	17	1.4%	8	2.2%	2	3.1%	4	2.5%	2	1.2%	2
Mean:		*0.17*		*0.10*		*0.15*		*0.31*		*0.27*		*0.31*
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Town centre environment

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Good	34.1%	329	30.2%	165	36.2%	29	34.7%	47	44.2%	34	42.7%	53
Average	43.9%	423	44.8%	245	49.7%	40	37.6%	51	37.8%	29	46.7%	58
Poor	20.4%	196	23.8%	130	10.7%	9	24.3%	33	15.1%	12	10.4%	13
(Don't know)	1.7%	16	1.2%	7	3.3%	3	3.4%	5	2.9%	2	0.2%	0
Mean:		*0.14*		*0.06*		*0.26*		*0.11*		*0.30*		*0.33*
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Parking availability

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Good	35.6%	344	35.3%	193	46.8%	37	38.3%	52	25.0%	19	33.8%	42
Average	39.4%	380	41.2%	225	37.1%	30	35.3%	48	31.5%	24	42.6%	53
Poor	17.5%	169	15.6%	85	10.1%	8	20.5%	28	34.2%	26	17.2%	21
(Don't know)	7.4%	72	8.0%	43	6.0%	5	5.9%	8	9.3%	7	6.4%	8
Mean:		*0.20*		*0.21*		*0.39*		*0.19*		*-0.10*		*0.18*
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Public transport

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Good	28.5%	275	28.8%	158	20.1%	16	33.5%	46	18.1%	14	33.5%	42
Average	30.0%	289	31.4%	171	34.2%	27	25.6%	35	15.8%	12	34.8%	43
Poor	16.2%	156	15.2%	83	14.2%	11	16.4%	22	33.9%	26	10.8%	13
(Don't know)	25.3%	244	24.6%	135	31.5%	25	24.5%	33	32.2%	25	20.9%	26
Mean:		*0.17*		*0.18*		*0.09*		*0.23*		*-0.23*		*0.29*
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Q23 What improvements to (CENTRE MENTIONED AT Q16) would make you spend more time there or visit it more often? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Shops - more / better non-food shops generally	18.5%	178	19.3%	105	17.7%	14	26.1%	36	12.4%	10	10.7%	13
Shops - more 'high street' retailers	12.7%	122	15.2%	83	12.0%	10	14.7%	20	7.5%	6	3.2%	4
Shops - more independent / specialist shops	9.9%	96	11.4%	62	8.4%	7	8.7%	12	11.9%	9	4.3%	5
Less empty shops	7.8%	75	9.5%	52	3.7%	3	6.8%	9	3.5%	3	6.6%	8
Shops - more clothes shops	7.2%	69	8.8%	48	8.4%	7	4.8%	7	4.3%	3	3.9%	5
Parking - more spaces / easier to park	6.3%	60	3.8%	21	7.7%	6	12.0%	16	14.8%	11	4.4%	5
Better public transport	5.5%	54	5.9%	33	9.5%	8	3.3%	4	6.0%	5	3.5%	4
Shops - more / better quality shops	5.4%	52	6.6%	36	3.7%	3	3.8%	5	6.7%	5	2.1%	3
Shops - more / better food stores	3.5%	33	0.7%	4	7.0%	6	8.0%	11	13.2%	10	2.4%	3
Parking - free parking	3.3%	32	4.5%	25	0.8%	1	4.1%	6	0.4%	0	0.5%	1
Parking - lower parking prices	3.1%	30	4.1%	22	1.8%	1	2.2%	3	1.4%	1	1.7%	2
Better nightlife	3.0%	29	4.8%	26	1.5%	1	0.0%	0	0.0%	0	1.4%	2
Cleaner streets / better maintained	3.0%	29	3.0%	17	3.1%	3	4.7%	6	0.0%	0	2.6%	3
More / better leisure / entertainment / cultural facilities	2.8%	27	3.6%	20	1.7%	1	0.3%	0	3.9%	3	2.1%	3
Update / refurbish it	2.4%	23	2.2%	12	0.8%	1	5.9%	8	2.4%	2	0.7%	1
More / better pubs / bars	2.2%	21	3.1%	17	3.0%	2	0.0%	0	0.0%	0	1.6%	2
More / better cafes / restaurants	2.2%	21	3.6%	20	0.3%	0	0.9%	1	0.0%	0	0.0%	0
Shops - lower prices in shops	2.1%	20	2.6%	14	0.3%	0	0.0%	0	0.8%	1	4.1%	5
Less charity shops	2.1%	20	3.0%	16	0.0%	0	0.7%	1	0.8%	1	1.9%	2
More / better events	1.7%	16	2.2%	12	1.8%	1	0.0%	0	0.0%	0	1.9%	2
More / better public toilets	1.2%	12	1.7%	9	1.5%	1	0.0%	0	0.4%	0	0.5%	1
Less hairdressers / barbers	1.0%	9	1.7%	9	0.0%	0	0.0%	0	0.0%	0	0.2%	0
More / better financial services (e.g. banks / building societies)	0.8%	8	0.0%	0	5.3%	4	2.4%	3	0.0%	0	0.0%	0
Better security / safety / better policing	0.6%	6	0.3%	1	0.0%	0	1.5%	2	0.0%	0	1.9%	2
Better disabled access	0.6%	6	0.8%	5	0.0%	0	0.3%	0	1.0%	1	0.0%	0
More / better seating areas	0.6%	6	0.3%	2	0.3%	0	1.5%	2	0.0%	0	1.4%	2
Better layout / shops closer together	0.6%	5	0.9%	5	0.0%	0	0.0%	0	0.4%	0	0.0%	0
More pedestrianisation / better pedestrian links	0.5%	5	0.3%	2	0.0%	0	2.4%	3	0.0%	0	0.0%	0
More / better range of other services (e.g. library, hairdresser, vets etc.)	0.5%	5	0.1%	1	1.5%	1	2.1%	3	0.0%	0	0.0%	0
Less traffic congestion / better access	0.5%	5	0.1%	1	1.5%	1	0.8%	1	1.7%	1	0.2%	0
Nicer atmosphere / friendlier people	0.5%	5	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Introduce a tram system	0.5%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.5%	1
More undercover shopping	0.4%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better promotion of what's there (e.g. posters/website/social media/email)	0.4%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better lighting	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More takeaways	0.3%	3	0.0%	0	1.8%	1	0.0%	0	0.0%	0	1.4%	2
Discount food retailer	0.2%	2	0.0%	0	0.0%	0	1.5%	2	0.0%	0	0.0%	0
Longer opening hours for cafes	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less takeaways	0.2%	2	0.1%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0
More attractive / nicer environment	0.1%	1	0.1%	1	0.3%	0	0.0%	0	0.0%	0	0.0%	0
Less phone shops	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less homelessness	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Open the canals	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More youth hostels	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Less cafes / restaurants	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Better internet coverage	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
More support for businesses	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Less tourist shops	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Keep public toilets open throughout the year	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Parking meters to accept cash	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
More / better street markets	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0
Less traffic wardens	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
To offer a Park & Ride service	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Less betting shops	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
More electric car charging facilities	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
(None)	21.2%	205	14.1%	77	27.4%	22	25.5%	35	38.4%	30	33.4%	42
(Don’t know)	9.3%	90	10.2%	56	4.2%	3	3.3%	4	4.3%	3	18.2%	23
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Meanscore: [Number of visits per week]

Q24 How often do you visit (CENTRE MENTIONED AT Q16) in the evening i.e. after 6pm, on average?
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Daily	5.9%	57	9.2%	50	1.5%	1	0.0%	0	0.0%	0	4.6%	6
4-6 times a week	2.1%	21	2.4%	13	0.0%	0	0.0%	0	0.0%	0	6.0%	7
2-3 times a week	10.6%	103	10.4%	57	22.3%	18	4.1%	6	4.4%	3	15.3%	19
Once a week	4.8%	46	3.9%	21	2.8%	2	4.6%	6	4.0%	3	10.7%	13
2-3 times a month	4.6%	44	6.2%	34	2.4%	2	0.8%	1	5.9%	5	2.1%	3
Once a month	5.5%	53	4.2%	23	2.1%	2	10.6%	14	7.3%	6	6.2%	8
Less often	21.0%	202	23.7%	130	28.9%	23	20.3%	28	12.3%	9	9.9%	12
Never	44.4%	428	38.5%	210	40.0%	32	58.6%	80	66.0%	51	44.1%	55
(Don't know)	1.1%	11	1.5%	8	0.0%	0	0.8%	1	0.0%	0	1.2%	2
Mean:		*0.90*		*1.14*		*0.73*		*0.21*		*0.21*		*1.16*
Weighted base:		965		547		80		137		77		124
Sample:		948		305		161		167		139		176

Q25 What do visit (CENTRE MENTIONED AT Q16) for in the evening? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16 or 'Never' at Q24

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Attending events	2.4%	13	3.4%	12	2.0%	1	0.0%	0	1.2%	0	0.4%	0
Bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cafes / restaurants	36.9%	202	38.9%	134	29.6%	14	46.0%	26	49.7%	13	20.1%	14
Cinema	12.0%	65	10.4%	36	13.0%	6	9.7%	5	28.2%	7	14.6%	10
Gym / sports hall / swimming / ice sports	4.0%	22	3.5%	12	7.0%	3	0.7%	0	3.7%	1	7.2%	5
Library	0.8%	5	1.2%	4	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Live music venues / gigs	6.1%	33	7.8%	27	5.3%	3	1.4%	1	4.1%	1	3.3%	2
Meeting family / friends	10.4%	57	12.9%	45	15.8%	8	2.9%	2	4.1%	1	2.5%	2
Nightclub	1.1%	6	1.2%	4	0.0%	0	0.0%	0	0.0%	0	2.3%	2
Place of worship	0.3%	2	0.2%	1	1.0%	0	0.0%	0	1.2%	0	0.4%	0
Pubs / bars	22.6%	123	26.4%	91	9.1%	4	25.1%	14	26.9%	7	9.7%	7
Takeaways / fast food	5.8%	32	4.9%	17	14.8%	7	9.0%	5	5.4%	1	1.7%	1
Theatre / shows	12.7%	69	14.5%	50	18.4%	9	10.6%	6	6.2%	2	3.9%	3
To work	3.4%	18	2.7%	9	2.9%	1	0.0%	0	0.0%	0	10.8%	8
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Food shopping	2.3%	13	0.0%	0	0.4%	0	5.1%	3	11.4%	3	9.3%	7
Gardens / green spaces / parks	1.3%	7	1.5%	5	0.0%	0	0.0%	0	0.0%	0	2.8%	2
Go for a walk	2.3%	12	1.9%	7	0.0%	0	5.1%	3	0.0%	0	4.0%	3
Health appointment	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0
Non-food shopping	3.1%	17	2.5%	9	0.0%	0	0.0%	0	6.5%	2	9.4%	7
Services such as post office, laundrette, vets, etc.	0.3%	2	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.9%	1
Visit place of education	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	6.6%	36	7.4%	25	1.0%	0	6.2%	3	0.0%	0	9.1%	7
Weighted base:		547		345		48		57		26		72
Sample:		396		155		70		58		40		73

Q26 What improvements or attractions would make you visit (CENTRE MENTIONED AT Q16) more often in the evening? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16 or 'Never' at Q24

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Better range of cafes / restaurants / pubs	13.0%	71	16.6%	57	0.0%	0	17.0%	10	10.6%	3	2.3%	2
More live music / concerts	3.5%	19	4.7%	16	4.0%	2	1.6%	1	0.0%	0	0.4%	0
More outdoor entertainment / events	3.1%	17	3.5%	12	2.5%	1	3.6%	2	0.0%	0	2.3%	2
A cinema	2.9%	16	1.7%	6	4.4%	2	3.2%	2	1.2%	0	8.0%	6
Public transport running later / more services	2.7%	15	0.7%	2	11.3%	5	5.1%	3	5.4%	1	4.0%	3
Bowling alley	2.7%	15	3.8%	13	0.0%	0	0.0%	0	0.0%	0	2.3%	2
More attractive environment	2.5%	14	3.0%	10	0.0%	0	3.6%	2	0.0%	0	2.3%	2
Shops / venues open later	2.3%	13	2.2%	8	1.3%	1	7.6%	4	0.0%	0	0.4%	0
Pubs open later	1.6%	8	2.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better cinema experience	1.4%	8	0.0%	0	16.4%	8	0.0%	0	0.0%	0	0.0%	0
Improved range of shops	1.4%	8	1.2%	4	0.0%	0	0.0%	0	0.0%	0	4.7%	3
More for families to do	1.2%	6	1.5%	5	0.0%	0	2.3%	1	0.0%	0	0.0%	0
More for families to do	1.2%	6	1.5%	5	0.0%	0	2.3%	1	0.0%	0	0.0%	0
Better street lighting	1.1%	6	1.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A theatre	1.0%	6	1.3%	5	2.5%	1	0.0%	0	0.0%	0	0.0%	0
Improved safety and security	1.0%	5	0.4%	1	0.0%	0	7.1%	4	0.0%	0	0.0%	0
Parking - lower parking prices	0.9%	5	1.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better theatre experience	0.9%	5	1.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Snooker / pool clubs	0.8%	4	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - more secure / safe	0.8%	4	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crazy golf	0.8%	4	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ghost / history walks	0.8%	4	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Light art installations	0.8%	4	1.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lower prices for food/drink in venues (including pubs/restaurants)	0.6%	3	0.4%	1	0.0%	0	1.6%	1	2.9%	1	0.0%	0
Parking - more spaces / easier to park	0.5%	3	0.0%	0	0.0%	0	1.4%	1	7.3%	2	0.0%	0
More / better theatres	0.3%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better cinemas	0.2%	1	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0
Parking - free parking	0.2%	1	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleaner / better maintained streets	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cultural venues open at night e.g. museums / galleries	0.1%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing / very little)	42.3%	232	39.8%	137	41.0%	20	48.9%	28	74.3%	20	38.3%	27
(Don't know)	15.8%	86	14.6%	50	10.7%	5	9.4%	5	1.2%	0	34.9%	25
Weighted base:		547		345		48		57		26		72
Sample:		396		155		70		58		40		73

Meanscore: [Number of visits per year]

Q27 How often do you do the following leisure activities? [PR]
Gym / health club / sports facility / swimming / ice sports

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
More than once a week	10.9%	110	12.9%	74	8.7%	7	11.3%	16	6.4%	5	6.0%	8
Once a week	7.8%	79	8.3%	48	9.3%	8	3.1%	4	1.6%	1	13.9%	18
Once a fortnight	0.7%	7	0.1%	1	0.2%	0	0.3%	0	2.5%	2	3.0%	4
Once a month	2.7%	27	2.2%	13	4.6%	4	3.4%	5	4.9%	4	1.3%	2
Once every 2 months	1.2%	12	1.6%	9	0.2%	0	0.0%	0	0.0%	0	2.0%	3
Once every 6 months	1.4%	14	1.5%	8	2.0%	2	0.3%	0	0.0%	0	2.6%	3
Once a year	0.6%	6	0.7%	4	1.5%	1	0.6%	1	0.0%	0	0.0%	0
Less often	9.4%	95	11.7%	67	11.7%	10	0.0%	0	0.0%	0	13.8%	18
Never	64.6%	654	60.5%	348	59.6%	50	79.4%	113	84.1%	68	57.4%	75
(Don’t know/varies)	0.7%	7	0.4%	2	2.2%	2	1.6%	2	0.4%	0	0.0%	0
Mean:		*16.19*		*18.28*		*14.93*		*14.08*		*8.81*		*14.65*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Pub / bar												
More than once a week	0.8%	9	0.6%	4	3.5%	3	0.3%	0	1.6%	1	0.2%	0
Once a week	11.5%	116	12.5%	71	6.0%	5	6.8%	10	5.2%	4	19.6%	26
Once a fortnight	6.7%	68	6.7%	39	9.4%	8	2.9%	4	8.7%	7	7.6%	10
Once a month	12.6%	128	15.0%	86	13.6%	11	10.0%	14	1.7%	1	11.0%	14
Once every 2 months	9.3%	94	10.5%	61	13.4%	11	8.0%	11	5.0%	4	5.4%	7
Once every 6 months	4.2%	42	5.4%	31	0.0%	0	6.3%	9	0.8%	1	1.2%	2
Once a year	0.8%	9	0.4%	2	3.1%	3	0.3%	0	2.4%	2	0.9%	1
Less often	6.9%	70	8.3%	47	10.4%	9	1.4%	2	3.4%	3	6.6%	9
Never	46.4%	470	40.1%	230	38.7%	32	61.9%	88	70.7%	57	47.3%	62
(Don't know/varies)	0.8%	8	0.4%	2	1.9%	2	2.1%	3	0.4%	0	0.2%	0
Mean:		*10.87*		*11.52*		*11.97*		*6.55*		*7.23*		*14.15*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187
Cafe / restaurant												
More than once a week	4.4%	45	4.1%	24	6.6%	6	4.6%	7	6.8%	5	2.7%	4
Once a week	22.6%	228	24.5%	141	20.6%	17	15.1%	22	10.6%	9	30.9%	41
Once a fortnight	13.9%	141	12.3%	70	15.8%	13	14.8%	21	19.0%	15	15.5%	20
Once a month	19.8%	200	21.9%	126	17.4%	15	19.9%	28	14.5%	12	15.0%	20
Once every 2 months	12.3%	125	13.9%	80	13.0%	11	10.5%	15	12.7%	10	6.7%	9
Once every 6 months	4.9%	50	4.4%	25	3.9%	3	9.8%	14	2.0%	2	4.2%	6
Once a year	0.2%	2	0.1%	1	0.8%	1	0.3%	0	0.0%	0	0.4%	1
Less often	7.2%	72	8.2%	47	6.2%	5	2.5%	4	3.8%	3	10.1%	13
Never	13.6%	138	9.9%	57	13.2%	11	19.9%	28	29.4%	24	13.1%	17
(Don't know/varies)	1.2%	12	0.7%	4	2.4%	2	2.5%	4	1.2%	1	1.4%	2
Mean:		*23.48*		*23.96*		*25.29*		*20.28*		*20.30*		*25.62*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187
Parks												
More than once a week	11.2%	114	12.2%	70	13.4%	11	7.4%	11	15.9%	13	6.6%	9
Once a week	15.8%	160	19.5%	112	7.9%	7	13.1%	19	8.0%	6	12.3%	16
Once a fortnight	6.9%	70	8.0%	46	3.8%	3	3.0%	4	2.5%	2	11.0%	14
Once a month	5.9%	59	5.6%	32	4.8%	4	9.4%	13	5.8%	5	3.9%	5
Once every 2 months	3.1%	31	3.6%	21	4.0%	3	3.1%	4	1.2%	1	1.2%	2
Once every 6 months	3.3%	33	3.7%	21	4.3%	4	2.2%	3	0.4%	0	3.8%	5
Once a year	0.3%	3	0.1%	1	1.7%	1	0.6%	1	0.0%	0	0.0%	0
Less often	8.8%	89	9.7%	56	13.3%	11	1.8%	3	2.3%	2	13.7%	18
Never	42.9%	434	36.4%	209	43.3%	36	56.2%	80	62.5%	50	44.5%	58
(Don't know/varies)	1.9%	19	1.2%	7	3.5%	3	3.3%	5	1.3%	1	2.9%	4
Mean:		*23.10*		*26.27*		*20.69*		*17.21*		*22.46*		*17.32*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187
Cinema												
More than once a week	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	3.8%	38	5.2%	30	0.0%	0	0.3%	0	2.9%	2	4.6%	6
Once a fortnight	4.7%	47	6.3%	36	2.9%	2	0.6%	1	3.2%	3	3.8%	5
Once a month	6.9%	70	6.0%	34	5.4%	5	8.1%	12	5.3%	4	11.7%	15
Once every 2 months	10.9%	110	12.3%	70	20.7%	17	10.7%	15	1.3%	1	4.8%	6
Once every 6 months	9.9%	100	11.0%	63	11.8%	10	11.0%	16	8.7%	7	3.4%	4
Once a year	3.2%	33	2.7%	16	2.4%	2	5.4%	8	3.5%	3	3.4%	4
Less often	10.6%	107	12.9%	74	10.8%	9	1.8%	3	7.8%	6	11.7%	15
Never	48.7%	493	42.5%	244	43.7%	37	60.0%	86	65.5%	53	56.2%	74
(Don't know/varies)	1.2%	12	1.0%	6	2.2%	2	2.1%	3	1.7%	1	0.5%	1
Mean:		*5.10*		*6.30*		*3.04*		*2.25*		*3.37*		*5.27*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Theatre												
More than once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	0.8%	8	1.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0
Once a month	2.8%	29	3.3%	19	5.0%	4	2.9%	4	1.3%	1	0.2%	0
Once every 2 months	9.6%	97	11.8%	67	8.9%	7	8.7%	12	7.3%	6	3.0%	4
Once every 6 months	10.7%	109	10.0%	57	15.0%	13	12.5%	18	10.7%	9	9.2%	12
Once a year	6.9%	70	7.4%	42	4.9%	4	7.5%	11	8.4%	7	4.4%	6
Less often	14.0%	141	15.8%	91	9.4%	8	3.8%	5	6.1%	5	24.5%	32
Never	53.2%	539	48.0%	276	54.8%	46	62.1%	89	65.8%	53	57.5%	75
(Don’t know/varies)	1.9%	19	2.2%	13	1.9%	2	2.5%	4	0.0%	0	1.2%	2
Mean:		*1.75*		*2.28*		*1.57*		*1.24*		*1.03*		*0.57*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187
Concerts												
More than once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	0.8%	8	1.5%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.2%	0
Once a month	3.3%	33	4.1%	23	2.2%	2	1.4%	2	5.4%	4	1.4%	2
Once every 2 months	7.4%	75	8.3%	48	8.3%	7	7.6%	11	4.7%	4	4.3%	6
Once every 6 months	13.2%	134	13.6%	78	23.2%	20	14.3%	20	10.1%	8	6.1%	8
Once a year	7.2%	73	7.9%	45	2.9%	2	11.5%	16	3.2%	3	5.1%	7
Less often	15.8%	160	18.7%	107	10.8%	9	2.3%	3	2.1%	2	29.7%	39
Never	50.7%	514	44.7%	257	50.1%	42	61.1%	87	73.3%	59	52.1%	68
(Don’t know/varies)	1.3%	14	1.1%	6	2.5%	2	1.9%	3	1.2%	1	1.2%	2
Mean:		*1.74*		*2.26*		*1.34*		*1.06*		*1.19*		*0.81*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187
Bingo												
More than once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	1.1%	12	1.2%	7	1.8%	2	0.0%	0	1.3%	1	1.4%	2
Once a fortnight	0.2%	2	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Once a month	0.3%	3	0.1%	1	0.0%	0	0.3%	0	0.0%	0	1.5%	2
Once every 2 months	0.6%	6	0.7%	4	1.3%	1	0.0%	0	0.0%	0	0.2%	0
Once every 6 months	0.5%	6	0.1%	1	0.6%	0	1.4%	2	0.0%	0	1.8%	2
Once a year	0.9%	9	1.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	10.6%	108	12.9%	74	4.8%	4	0.3%	0	2.4%	2	21.0%	28
Never	84.8%	859	82.7%	475	89.0%	75	94.6%	135	96.3%	78	73.4%	96
(Don’t know/varies)	0.9%	9	0.4%	2	2.5%	2	3.4%	5	0.0%	0	0.0%	0
Mean:		*0.79*		*0.83*		*1.09*		*0.06*		*0.71*		*1.23*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187
Ten-pin bowling												
More than once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Once a month	0.3%	4	0.0%	0	4.2%	4	0.0%	0	0.0%	0	0.0%	0
Once every 2 months	0.3%	3	0.3%	2	1.3%	1	0.3%	0	0.4%	0	0.0%	0
Once every 6 months	2.8%	28	1.7%	10	9.8%	8	5.9%	8	2.1%	2	0.0%	0
Once a year	5.4%	55	8.5%	49	3.7%	3	2.3%	3	0.0%	0	0.0%	0
Less often	11.4%	116	12.2%	70	6.5%	5	0.9%	1	4.7%	4	26.9%	35
Never	78.7%	797	76.9%	442	71.3%	60	87.4%	125	92.8%	75	72.9%	96
(Don’t know/varies)	0.9%	10	0.4%	2	2.7%	2	3.2%	5	0.0%	0	0.2%	0
Mean:		*0.24*		*0.20*		*1.02*		*0.17*		*0.09*		*0.14*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Museum or place of historical / cultural interest												
More than once a week	0.0%	0	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	1.4%	14	1.9%	11	0.2%	0	1.6%	2	0.4%	0	0.0%	0
Once a fortnight	0.5%	6	0.3%	1	0.0%	0	2.7%	4	0.0%	0	0.2%	0
Once a month	3.2%	32	3.6%	21	2.6%	2	3.9%	6	0.8%	1	2.2%	3
Once every 2 months	4.5%	45	4.3%	25	6.0%	5	5.5%	8	6.5%	5	1.9%	2
Once every 6 months	8.0%	81	7.3%	42	12.9%	11	10.2%	15	4.7%	4	7.4%	10
Once a year	7.7%	78	9.1%	52	8.1%	7	6.6%	9	6.5%	5	3.6%	5
Less often	13.8%	140	16.3%	94	10.2%	9	2.1%	3	1.7%	1	25.2%	33
Never	59.2%	600	55.9%	321	56.0%	47	64.0%	91	78.5%	63	58.5%	77
(Don't know/varies)	1.7%	17	1.2%	7	3.8%	3	3.4%	5	0.8%	1	1.1%	1
Mean:		*1.85*		*2.09*		*1.49*		*2.69*		*0.87*		*0.75*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187
Events (e.g. music festivals, fairs, etc)												
More than once a week	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a week	0.4%	4	0.7%	4	0.2%	0	0.0%	0	0.0%	0	0.0%	0
Once a fortnight	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Once a month	1.3%	13	1.6%	9	0.6%	0	1.4%	2	0.0%	0	1.0%	1
Once every 2 months	3.9%	40	4.0%	23	3.8%	3	2.9%	4	5.3%	4	4.0%	5
Once every 6 months	7.4%	75	7.9%	45	14.9%	13	3.4%	5	4.8%	4	6.7%	9
Once a year	11.4%	116	13.6%	78	12.7%	11	7.7%	11	9.2%	7	6.6%	9
Less often	12.3%	125	15.2%	88	7.9%	7	0.0%	0	0.0%	0	23.3%	31
Never	59.4%	602	52.5%	301	55.4%	47	81.5%	116	79.5%	64	56.4%	74
(Don't know/varies)	3.7%	38	4.5%	26	4.4%	4	3.2%	5	1.3%	1	2.0%	3
Mean:		*0.98*		*1.25*		*0.93*		*0.50*		*0.51*		*0.69*
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	

Q28 Where do you visit most often for GYM / HEALTH CLUB / SPORTS FACILITY / SWIMMING / ICE SPORTS?
Those that said 'Gym / health club / sports facility / swimming / ice sports' at least 'Once a month' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Action Glen Adventure Park, Knock Road, Crieff, PH7 3LQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Golf Club, Orchil Road, Auchterarder, PH3 1LS	0.2%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Bannatyne Health Club And Spa, St Catherines Retail Park, Perth, PH1 5RG	16.4%	37	27.2%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bell's Sports Centre, Caledonia House, Hay Street, Perth, PH1 5HS	7.8%	17	12.9%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Club 300 Blairgowrie, Jessie Street, Blairgowrie, PH10 6BT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Club 300 Gym & Personal Training Perth, Jeanfield Road, Perth, PH1 1PH	1.1%	2	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dewars Centre (including ice skating and curling), Glover Street, Perth, PH2 0TH	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Dundee Ice Arena, Camperdown Leisure Complex, Kingsway West, Dundee, DD2 3SQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Golf Club, Beeches Park, Kinross, KY13 8EU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Live Active Atholl, West Moulin Road, Pitlochry, PH16 5EA	0.6%	1	0.0%	0	0.0%	0	0.0%	0	11.3%	1	0.0%	0
Live Active Blairgowrie, Beeches Road, Blairgowrie, PH10 6PN	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Live Active Loch Leven, Lathro Lane, Kinross, KY13 8SY	1.0%	2	0.0%	0	11.2%	2	0.0%	0	0.0%	0	0.0%	0
Michael Woods Sport and Leisure, Viewfield, Glenrothes, KY6 2RD	0.4%	1	0.0%	0	4.6%	1	0.0%	0	0.0%	0	0.0%	0
Perth College Academy of Sport & Wellbeing, Perth, PH1 2LU	1.7%	4	2.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth Leisure Pool, Glasgow Road, Perth, PH2 0HZ	9.3%	21	15.1%	20	1.1%	0	1.5%	0	0.0%	0	0.0%	0
The Body Academy Gym, South William Street, Perth, PH2 8LS	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
The Coach House Spa, The Avenue, Kinross House Estate, Kinross, KY13 8ES	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Gym Group Perth, St Catherines Retail Park, Perth, PH1 5XA	1.7%	4	2.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Leisure Country Club at Crieff Hydro Hotel, Crieff, PH7 3LQ	0.6%	1	0.0%	0	0.0%	0	5.0%	1	0.0%	0	0.0%	0
U Gym, Alexandra Street, Tillicoultry, FK13 6HP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberfeldy Town Centre	2.1%	5	0.0%	0	0.0%	0	0.0%	0	37.0%	5	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.2%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair')	2.6%	6	0.5%	1	0.0%	0	0.0%	0	2.6%	0	14.7%	5
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.2%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.2%	0	0.0%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.2%	0	0.0%	0	2.5%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	5.2%	12	4.0%	5	1.1%	0	0.0%	0	0.0%	0	18.9%	6
Dunfermline Town Centre	0.6%	1	0.0%	0	7.5%	1	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Edinburgh City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	1.2%	3	0.0%	0	0.0%	0	10.8%	3	0.0%	0	0.0%	0
Glenrothes Town Centre	0.4%	1	0.0%	0	4.9%	1	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	2.0%	5	0.0%	0	23.9%	5	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.6%	1	0.0%	0	6.6%	1	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre	11.9%	27	19.6%	27	1.1%	0	0.0%	0	0.0%	0	0.0%	0
Pitlochry Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	7.8%	1	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.6%	1	0.0%	0	0.0%	0	5.0%	1	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Algo Business Centre, Glenearn Road, Perth, PH2 0NJ	1.7%	4	2.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Golf Club, B954, Alyth, PH11 8HF	0.5%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Blairgowrie Community Campus, Blairgowrie, PH10 6FH	0.9%	2	0.0%	0	0.0%	0	7.8%	2	0.0%	0	0.0%	0
Blairgowrie Recreation Centre, Beeches Road, Blairgowrie, PH10 6PN	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0
Breadalbane Community Campus, Crieff Road, Aberfeldy, PH15 2DU	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Bridge Of Cally Village Centre	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Carnoustie Town Centre	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	2
Crieff High School, Strathearn Community Campus, Pittenzie Road, Crieff, PH7 3JN	0.6%	1	0.0%	0	0.0%	0	5.0%	1	0.0%	0	0.0%	0
Crook of Devon Village Centre	0.1%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0
Curves, Glenearn Road, Perth, PH2 0NJ	0.3%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dance Bank, Burghmuir Road, Perth, PH1 1JG	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	2
Doune Village Centre	0.4%	1	0.0%	0	0.0%	0	3.5%	1	0.0%	0	0.0%	0
Dunblane Hydro, Perth Road, Dunblane, FK15 0HG	2.7%	6	0.0%	0	0.0%	0	23.1%	6	0.0%	0	0.0%	0
Dunblane Town Centre	0.8%	2	0.0%	0	0.0%	0	6.9%	2	0.0%	0	0.0%	0
Dunkeld House Hotel, Blairgowrie Road, Dunkeld, PH8 0HX	1.1%	2	0.5%	1	0.0%	0	0.0%	0	13.6%	2	0.0%	0
Dunning Golf Club, Station Road, Dunning, Perth, PH2 0RH	0.3%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Community Campus, Kirriemuir Road, Forfar, DD8 3TG	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	2
Forfar Town Centre	5.1%	11	0.5%	1	0.0%	0	0.0%	0	0.0%	0	33.8%	11
Greengairs Health & Fitness, St Fink Farm House,	0.3%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Greengairs, PH10 7HE												
Kelty Community Centre, Main Street, Kelty, KY4 0AQ	0.1%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Welfare Miners Club, Main Street, Kinglassie, Lochgelly, KY5 0XA	0.1%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0
Landmark Hotel & Leisure Club, Kingsway West, Dundee, DD2 5JT	2.3%	5	3.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mains Of Taymouth Country Estate & Golf Club, Kenmore, Aberfeldy, PH15 2HN	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Murrayshall Country Estate, Murrayshall Road, Scone, PH2 7PH	0.3%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pitlochry Bowling Club, West Moulin Road, Pitlochry, PH16 5ED	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	0	0.0%	0
Pitlochry Golf Club, Golf Course Road, Pitlochry, PH16 5QY	0.3%	1	0.0%	0	0.0%	0	0.0%	0	6.0%	1	0.0%	0
Puregym, Upper Craigs, Stirling, FK8 2DT	1.0%	2	0.0%	0	0.0%	0	8.8%	2	0.0%	0	0.0%	0
Results Gym, St James Road, Forfar, DD8 2AQ	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	2
Royal Hotel, Castle Street, Forfar, DD8 3AE	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	1
St Andrews Golf Centre, Wallace Street, St Andrews, KY16 8AL	0.1%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0
Strathearn Community Campus, Pittenzie Road, Crieff, PH7 3JN	0.4%	1	0.0%	0	0.0%	0	3.5%	1	0.0%	0	0.0%	0
The Blairgowrie Golf Club, Golf Course Road, Blairgowrie, PH10 6LG	0.3%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
University of Stirling, East Link Road, Stirling, FK9 4LA	0.8%	2	0.0%	0	0.0%	0	6.9%	2	0.0%	0	0.0%	0
Wyndham Duchally Country Estate, Gleneagles, Auchterarder, PH3 1PN	0.9%	2	0.0%	0	0.0%	0	7.8%	2	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	4.2%	9	2.3%	3	29.1%	6	0.0%	0	6.0%	1	0.0%	0
Weighted base:		224		135		19		26		12		32
Sample:		175		63		32		27		24		29

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	

Q29 Where do you visit most often for PUB / BAR?
Those that said 'Pub / bar' at least 'Once every 6 months' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Kinnoull Hill Woodland Park, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkgate Park, Kinross	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MacRosty Park, Comrie Road, Crieff	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Millennium Park, Muirhall Road, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rodney Gardens, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
South Inch Park and Gardens, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Victoria Park, Taybridge Terrace, Aberfeldy	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberfeldy Town Centre	1.2%	5	0.0%	0	0.0%	0	0.0%	0	28.7%	5	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Auchterarder Town Centre	2.2%	10	0.2%	1	0.0%	0	19.1%	9	0.0%	0	0.0%	0
Bankfoot Village Centre	1.7%	8	2.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	1.8%	8	0.8%	2	0.0%	0	0.0%	0	0.0%	0	10.1%	6
Bridge of Earn Town Centre (aka 'The Brig')	0.5%	2	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.4%	2	0.0%	0	0.0%	0	3.6%	2	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.4%	2	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	1
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	1.6%	7	0.0%	0	0.0%	0	14.5%	7	0.0%	0	0.0%	0
Cupar Town Centre	0.2%	1	0.0%	0	2.8%	1	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	7.2%	33	6.0%	18	1.2%	0	0.0%	0	0.0%	0	25.4%	15
Dunfermline Town Centre	0.7%	3	0.0%	0	8.8%	3	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	2.9%	13	2.6%	8	0.0%	0	0.0%	0	30.0%	6	0.0%	0
Edinburgh City Centre	3.2%	14	2.4%	7	14.6%	6	3.4%	2	0.0%	0	0.0%	0
Errol Village Centre	0.7%	3	1.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.8%	4	0.0%	0	0.0%	0	5.9%	3	0.0%	0	1.1%	1
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.3%	1	0.2%	1	1.6%	1	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.4%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.1%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Kinross Town Centre	2.5%	12	0.0%	0	30.0%	12	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.3%	1	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.3%	1	0.2%	1	1.2%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	47.6%	217	71.3%	208	7.4%	3	7.5%	4	0.0%	0	4.6%	3
Pitlochry Town Centre	1.8%	8	0.6%	2	0.0%	0	0.0%	0	32.5%	6	0.5%	0
Ratray Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Scone Town Centre	1.5%	7	2.3%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.9%	4	0.0%	0	0.0%	0	8.3%	4	0.0%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Store)												
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren Kitchens & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberdeen Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberuthven Village Centre	0.3%	1	0.0%	0	0.0%	0	2.6%	1	0.0%	0	0.0%	0
Abroath Town Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2
Auchtermuchty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Balquhidder Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannockburn Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beveridge Park, Abbotshall Road, Kirkcaldy, KY2 5NE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blackpool Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Blair Atholl Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0
Blair Drummond Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowhill Bowling Club, Cardenden, Lochgelly, KY5 0BQ	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Boyle Park, Threewells Drive, Forfar, DD8 1EZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brechin Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allen Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burrelton Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Camperdown Wildlife Centre, Coupar Angus Road, Dundee, DD2 4TF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.1%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0
Carse of Gowrie Local Centre	0.2%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre Kinross, Turfhills, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.1%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0
Cheltenham Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cherrybank Inn, Glasgow Road, Perth, PH2 0NA	0.3%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Craigie Hill Golf Club, Cherrybank, Perth, PH2 0N	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Craigie Park, Craigie Road, Ayr, KA8 0HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Road, Perth	0.2%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dalgety Bay Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dalkeith Country Park, Via King's Gate, Dalkeith, Edinburgh, EH22 1ST	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Davie Park, Ashgorve Road, Rattray, PH10 7DA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Diamond Jubilee Play Park, Manse Road, Lauder, TD2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
6QL												
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Huntingtower Park, Perth, PH1 3JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Donington Park, Castle Donington, Derby, DE74 2BN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	2.7%	12	0.0%	0	0.0%	0	24.8%	12	0.0%	0	0.0%	0
Dunkeld & Birnam Golf Club, Fungarth, Dunkeld, PH8 0ES	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunning Village Centre	1.1%	5	1.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Golf Range, Brechin Road, Forfar, DD8 3R	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Loch Country Park, Craig O Loch Road, Forfar, DD8 1BT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	5.2%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	40.5%	24
Garvock Local Centre, Dunfermline	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glencarse Village	0.2%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0
Glenfarg Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gloagburn Farm Shop and Café, Tibbermore, Perth, PH1 1QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gorgie Local Centre, Edinburgh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildtown Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highland Safaris, B846, Aberfeldy, PH15 2JQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
House of Bruar, B8079, Pitagowan, PH18 5TW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.3%	1	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0
Kenmore Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kilnloch Rannoch Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
King James VI Golf Cub, Moncreiffe Island, Perth, PH2 8NR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Village Centre	0.1%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0
Kings Park, Albert Place, Stirling, FK8 2RF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kippendavie And Cauldhame Estates, Sheriffmuir, Dunblane, FK15 0LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ladybank Village Centre	0.1%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0
Laighhills Park, Laighills Park, Dunblane, FK15 0AU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Larghan Victory Park, Coupar Angus, Blairgowrie, PH13 9ER	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leslie Village Centre	0.2%	1	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Linlithgow Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loch Leven National Nature Reserve, Kinross, KY13 8US	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loch Leven's Larder & Channel Farm, Kinross, KY13 9HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lochearnhead Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lochee Park, Ancrum Road, Dundee, DD2 2HN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Lochore Meadows (Park), Crosshill, Lochgelly, KY5 8BA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Meikleour Village Centre	0.5%	2	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.9%	2
Memus Village Centre	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	2
Moulin Hotel, Kirkmichael Road, Moulin, Pitlochry, PH16 5EW	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0
Murrayfield Stadium, Roseburn Street, Edinburgh, EH12 5PJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newburgh Village Centre	0.1%	0	0.0%	0	1.2%	0	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2
North Inch (Park), Barossa Place, Perth, PH1 5HG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
North Muirton Local Centre, Perth	0.2%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peel Farm Coffee & Crafts, Bridgend of Lintrathen, Kirriemuir, DD8 5JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pitcairngreen Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pittencrief Park, Pittencrieff Street, Dunfermline, KY12 8QH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Quarrymill Woodland Park, Isla Road, Perth, PH2 7HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ravenscraig Park, Dysart Road, Kirkcaldy, KY1 2AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverside Inn, Riverside Drive, Dundee, DD2 1UH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Palace, Scone, Perth, PH2 6BD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scotlandwell Village Centre	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
St Andrews Town Centre	0.3%	1	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0
Strathmiglo Village Centre	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0
Strathmore Golf Centre, Leroch, Alyth, Blairgowrie, PH11 8NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tarbert Town Centre, Isle of Harris	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Drovers Inn, A82, Inverarnan, G83 7DX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thornhill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vane Farm Nature Reserve, B9097, Kinross, KY13 9LX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Victory Park, Ardler Road, Meigle, PH12 8RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Viewlands Park, Cornhill Way, Perth, PH1 1LJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.4%	2	0.0%	0	0.0%	0	4.1%	2	0.0%	0	0.0%	0
(Don't know / varies)	4.7%	21	4.4%	13	11.8%	5	5.4%	3	5.3%	1	0.5%	0
Weighted base:		457		292		39		49		19		59
Sample:		307		124		59		42		27		55

Q30 Where do you visit most often for CAFE / RESTAURANT?

Those that said 'Cafe / restaurant' at least 'Once every 6 months' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Kinnoull Hill Woodland Park, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkgate Park, Kinross	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MacRosty Park, Comrie Road, Crieff	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Millennium Park, Muirhall Road, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rodney Gardens, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
South Inch Park and Gardens, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Victoria Park, Taybridge Terrace, Aberfeldy	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberfeldy Town Centre	1.3%	10	0.0%	0	0.0%	0	0.0%	0	18.7%	10	0.0%	0
Abernethy Village Centre	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Auchterarder Town Centre	3.1%	25	1.2%	6	0.3%	0	17.7%	19	0.0%	0	0.0%	0
Bankfoot Village Centre	0.7%	6	1.1%	5	0.0%	0	0.0%	0	1.2%	1	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	3.2%	25	1.0%	5	0.0%	0	0.0%	0	0.0%	0	21.1%	21
Bridge of Earn Town Centre (aka 'The Brig')	0.2%	2	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Comrie Village Centre	0.3%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	2.5%	20	0.2%	1	0.0%	0	17.7%	19	0.0%	0	0.0%	0
Cupar Town Centre	0.4%	3	0.4%	2	2.6%	2	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	4.9%	38	3.8%	18	0.3%	0	1.9%	2	0.0%	0	18.9%	19
Dunfermline Town Centre	0.7%	5	0.0%	0	7.9%	5	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	1.1%	9	1.0%	5	0.0%	0	0.0%	0	8.2%	4	0.0%	0
Edinburgh City Centre	1.3%	10	0.7%	3	6.6%	4	1.9%	2	0.0%	0	0.7%	1
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	1.1%	9	1.4%	7	0.0%	0	1.2%	1	0.0%	0	0.7%	1
Gleneagles Local Centre, Auchterarder	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.5%	4	0.0%	0	5.8%	4	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.6%	5	1.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.4%	3	0.0%	0	0.0%	0	2.8%	3	0.0%	0	0.0%	0
Kinross Town Centre	2.0%	16	0.0%	0	24.7%	16	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.3%	2	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.2%	1	0.0%	0	1.9%	1	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	53.6%	423	80.3%	374	18.0%	12	13.8%	15	23.6%	12	10.2%	10
Pitlochry Town Centre	2.4%	19	0.2%	1	0.0%	0	0.0%	0	33.8%	18	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	1.4%	11	2.4%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	2.1%	17	0.0%	0	0.0%	0	15.2%	16	0.0%	0	0.3%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Store)												
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren Kitchens & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	0.6%	4	0.8%	4	0.3%	0	0.4%	0	0.0%	0	0.0%	0
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberdeen Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberuthven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Auchtermuchty Village Centre	0.1%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Balquhidder Village Centre	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Bannockburn Local Centre	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Beveridge Park, Abbotshall Road, Kirkcaldy, KY2 5NE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blackpool Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blair Atholl Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Blair Drummond Village Centre	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Bowhill Bowling Club, Cardenden, Lochgelly, KY5 0BQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Boyle Park, Threewells Drive, Forfar, DD8 1EZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brechin Town Centre	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allen Village Centre	0.1%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0
Burrelton Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Camperdown Wildlife Centre, Coupar Angus Road, Dundee, DD2 4TF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carse of Gowrie Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre Kinross, Turfhills, Kinross, KY13 0NQ	0.2%	1	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheltenham Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cherrybank Inn, Glasgow Road, Perth, PH2 0NA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Craigie Hill Golf Club, Cherrybank, Perth, PH2 0N	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Craigie Park, Craigie Road, Ayr, KA8 0HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Road, Perth	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dalgety Bay Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dalkeith Country Park, Via King's Gate, Dalkeith, Edinburgh, EH22 1ST	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Davie Park, Ashgorve Road, Rattray, PH10 7DA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Diamond Jubilee Play Park, Manse Road, Lauder, TD2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
6QL												
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Huntingtower Park, Perth, PH1 3JJ	0.2%	2	0.2%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Donington Park, Castle Donington, Derby, DE74 2BN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	1.7%	13	0.0%	0	0.0%	0	12.3%	13	0.0%	0	0.0%	0
Dunkeld & Birnam Golf Club, Fungarth, Dunkeld, PH8 0ES	0.2%	2	0.0%	0	0.0%	0	0.0%	0	3.2%	2	0.0%	0
Dunning Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Fife Town Centre	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Golf Range, Brechin Road, Forfar, DD8 3R	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	0
Forfar Loch Country Park, Craig O Loch Road, Forfar, DD8 1BT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	3.3%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.4%	26
Garvock Local Centre, Dunfermline	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
Glencarse Village	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	0
Glenfarg Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gloagburn Farm Shop and Café, Tibbermore, Perth, PH1 1QL	0.3%	3	0.0%	0	0.0%	0	2.3%	2	0.0%	0	0.3%	0
Gorgie Local Centre, Edinburgh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildtown Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highland Safaris, B846, Aberfeldy, PH15 2JQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
House of Bruar, B8079, Pitagowan, PH18 5TW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Inveralmond Local Centre, Perth	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Kenmore Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0
Kilnloch Rannoch Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
King James VI Golf Cub, Moncreiffe Island, Perth, PH2 8NR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kings Park, Albert Place, Stirling, FK8 2RF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kippendavie And Cauldhame Estates, Sheriffmuir, Dunblane, FK15 0LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ladybank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Laighhills Park, Laighills Park, Dunblane, FK15 0AU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Larghan Victory Park, Coupar Angus, Blairgowrie, PH13 9ER	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leslie Village Centre	0.2%	2	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0
Linlithgow Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loch Leven National Nature Reserve, Kinross, KY13 8US	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loch Leven's Larder & Channel Farm, Kinross, KY13 9HD	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Lochearnhead Village Centre	0.0%	0	0.0%	0	0.0%	0	0.4%	0	0.0%	0	0.0%	0
Lochee Park, Ancrum Road, Dundee, DD2 2HN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Lochore Meadows (Park), Crosshill, Lochgelly, KY5 8BA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Meikleour Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Memus Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moulin Hotel, Kirkmichael Road, Moulin, Pitlochry, PH16 5EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
Murrayfield Stadium, Roseburn Street, Edinburgh, EH12 5PJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newburgh Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
North Inch (Park), Barossa Place, Perth, PH1 5HG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
North Muirton Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peel Farm Coffee & Crafts, Bridgend of Lintrathen, Kirriemuir, DD8 5JJ	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Pitcairngreen Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pittencrief Park, Pittencrieff Street, Dunfermline, KY12 8QH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Quarrymill Woodland Park, Isla Road, Perth, PH2 7HQ	0.2%	1	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Ravenscraig Park, Dysart Road, Kirkcaldy, KY1 2AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverside Inn, Riverside Drive, Dundee, DD2 1UH	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Scone Palace, Scone, Perth, PH2 6BD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scotlandwell Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Andrews Town Centre	0.3%	2	0.0%	0	3.4%	2	0.0%	0	0.0%	0	0.0%	0
Strathmiglo Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Strathmore Golf Centre, Leroch, Alyth, Blairgowrie, PH11 8NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	0
Tarbert Town Centre, Isle of Harris	0.2%	2	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0
The Drovers Inn, A82, Inverarnan, G83 7DX	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	2
Thornhill Village Centre	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Vane Farm Nature Reserve, B9097, Kinross, KY13 9LX	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
Victory Park, Ardler Road, Meigle, PH12 8RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Viewlands Park, Cornhill Way, Perth, PH1 1LJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	5.1%	40	3.2%	15	11.4%	7	3.7%	4	6.3%	3	10.4%	10
Weighted base:		788		465		65		107		53		98
Sample:		750		262		134		130		92		132

Q31 Where do you visit most often for PARKS?
Those that said 'Parks' at least 'Once every 6 months' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Kinnoull Hill Woodland Park, Perth	0.5%	2	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkgate Park, Kinross	0.9%	4	0.0%	0	12.8%	4	0.0%	0	0.0%	0	0.0%	0
MacRosty Park, Comrie Road, Crieff	4.6%	21	1.5%	5	0.0%	0	30.8%	17	0.0%	0	0.0%	0
Millennium Park, Muirhall Road, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rodney Gardens, Perth	0.2%	1	0.2%	1	0.0%	0	0.7%	0	0.0%	0	0.0%	0
South Inch Park and Gardens, Perth	9.6%	45	14.2%	43	0.0%	0	1.6%	1	2.4%	1	0.6%	0
Victoria Park, Taybridge Terrace, Aberfeldy	1.0%	5	0.0%	0	0.0%	0	0.0%	0	16.8%	5	0.6%	0
Aberfeldy Town Centre	0.7%	3	0.0%	0	0.0%	0	0.0%	0	11.7%	3	0.0%	0
Abernethy Village Centre	0.4%	2	0.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1
Auchterarder Town Centre	2.1%	10	0.0%	0	0.0%	0	17.7%	10	0.0%	0	0.0%	0
Bankfoot Village Centre	0.8%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.4%	6
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	1.0%	4	0.2%	1	0.0%	0	0.0%	0	0.0%	0	7.3%	4
Cowdenbeath Town Centre	0.1%	0	0.0%	0	1.5%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.9%	4	0.0%	0	0.0%	0	7.5%	4	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	3.9%	18	4.0%	12	0.0%	0	0.0%	0	0.0%	0	11.9%	6
Dunfermline Town Centre	0.4%	2	0.0%	0	5.4%	2	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	1.2%	6	0.2%	1	2.1%	1	0.0%	0	15.0%	4	0.0%	0
Edinburgh City Centre	0.1%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.4%	2	0.0%	0	5.3%	2	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.7%	3	0.0%	0	10.9%	3	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.2%	1	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	31.8%	148	47.0%	142	8.5%	3	6.1%	3	1.2%	0	0.0%	0
Pitlochry Town Centre	1.9%	9	0.0%	0	0.6%	0	0.0%	0	31.0%	8	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	3.5%	16	5.4%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Store)												
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren Kitchens & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberdeen Town Centre	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Aberuthven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchtermuchty Village Centre	0.3%	1	0.0%	0	3.9%	1	0.0%	0	0.0%	0	0.0%	0
Balquhidder Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannockburn Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beveridge Park, Abbotshall Road, Kirkcaldy, KY2 5NE	0.3%	1	0.0%	0	3.9%	1	0.0%	0	0.0%	0	0.0%	0
Blackpool Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blair Atholl Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blair Drummond Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowhill Bowling Club, Cardenden, Lochgelly, KY5 0BQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Boyle Park, Threewells Drive, Forfar, DD8 1EZ	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Brechin Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allen Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burrelton Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Camperdown Wildlife Centre, Coupar Angus Road, Dundee, DD2 4TF	0.4%	2	0.2%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Cardenden Town Centre	0.3%	1	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Carse of Gowrie Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre Kinross, Turfhills, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheltenham Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cherrybank Inn, Glasgow Road, Perth, PH2 0NA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Craigie Hill Golf Club, Cherrybank, Perth, PH2 0N	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Craigie Park, Craigie Road, Ayr, KA8 0HD	1.1%	5	1.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Road, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dalgety Bay Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dalkeith Country Park, Via King's Gate, Dalkeith, Edinburgh, EH22 1ST	0.2%	1	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0
Davie Park, Ashgorve Road, Rattray, PH10 7DA	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1
Diamond Jubilee Play Park, Manse Road, Lauder, TD2	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	0	0.6%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
6QL												
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Huntingtower Park, Perth, PH1 3JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Donington Park, Castle Donington, Derby, DE74 2BN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	1.8%	8	0.0%	0	0.0%	0	15.2%	8	0.0%	0	0.0%	0
Dunkeld & Birnam Golf Club, Fungarth, Dunkeld, PH8 0ES	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunning Village Centre	0.2%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Golf Range, Brechin Road, Forfar, DD8 3R	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Loch Country Park, Craig O Loch Road, Forfar, DD8 1BT	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.2%	2
Forfar Town Centre	3.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	34.2%	17
Garvock Local Centre, Dunfermline	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glencarse Village	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenfarg Village Centre	0.2%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gloagburn Farm Shop and Café, Tibbermore, Perth, PH1 1QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gorgie Local Centre, Edinburgh	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Guildtown Village Centre	1.1%	5	1.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highland Safaris, B846, Aberfeldy, PH15 2JQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
House of Bruar, B8079, Pitagowan, PH18 5TW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kelty Village Centre	0.2%	1	0.0%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0
Kenmore Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kilnloch Rannoch Village Centre	0.5%	2	0.0%	0	0.0%	0	0.0%	0	8.2%	2	0.0%	0
King James VI Golf Cub, Moncreiffe Island, Perth, PH2 8NR	0.2%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kings Park, Albert Place, Stirling, FK8 2RF	0.1%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Kippendavie And Cauldhame Estates, Sheriffmuir, Dunblane, FK15 0LP	0.2%	1	0.0%	0	0.0%	0	1.6%	1	0.0%	0	0.0%	0
Ladybank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Laighhills Park, Laighills Park, Dunblane, FK15 0AU	1.1%	5	0.0%	0	0.0%	0	9.3%	5	0.0%	0	0.0%	0
Larghan Victory Park, Coupar Angus, Blairgowrie, PH13 9ER	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.7%	4
Leslie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Linlithgow Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loch Leven National Nature Reserve, Kinross, KY13 8US	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Loch Leven's Larder & Channel Farm, Kinross, KY13 9HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lochearnhead Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lochee Park, Ancrum Road, Dundee, DD2 2HN	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Lochore Meadows (Park), Crosshill, Lochgelly, KY5 8BA	0.2%	1	0.0%	0	3.6%	1	0.0%	0	0.0%	0	0.0%	0
Meikleour Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Memus Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moulin Hotel, Kirkmichael Road, Moulin, Pitlochry, PH16 5EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murrayfield Stadium, Roseburn Street, Edinburgh, EH12 5PJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newburgh Village Centre	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2
North Inch (Park), Barossa Place, Perth, PH1 5HG	11.5%	54	17.6%	53	1.5%	0	0.7%	0	0.0%	0	0.0%	0
North Muirton Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peel Farm Coffee & Crafts, Bridgend of Lintrathen, Kirriemuir, DD8 5JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pitcairngreen Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pittencrief Park, Pittencrieff Street, Dunfermline, KY12 8QH	0.1%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Quarrymill Woodland Park, Isla Road, Perth, PH2 7HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ravenscraig Park, Dysart Road, Kirkcaldy, KY1 2AZ	0.1%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0
Riverside Inn, Riverside Drive, Dundee, DD2 1UH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Palace, Scone, Perth, PH2 6BD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scotlandwell Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Andrews Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Strathmiglo Village Centre	0.2%	1	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0
Strathmore Golf Centre, Leroch, Alyth, Blairgowrie, PH11 8NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tarbert Town Centre, Isle of Harris	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Drovers Inn, A82, Inverarnan, G83 7DX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thornhill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vane Farm Nature Reserve, B9097, Kinross, KY13 9LX	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Victory Park, Ardler Road, Meigle, PH12 8RW	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	2
Viewlands Park, Cornhill Way, Perth, PH1 1LJ	0.2%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	5.1%	24	2.4%	7	15.0%	5	7.4%	4	11.3%	3	9.1%	5
Weighted base:		467		302		32		54		27		51
Sample:		369		143		62		62		46		56

Q32 Where do you visit most often for CINEMA?
Those that said 'Cinema' at least 'Once a year' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Cineworld Dundee, Camperdown Leisure Park, Dundee, DD2 4TF	8.4%	34	9.2%	23	0.0%	0	4.4%	2	0.0%	0	19.9%	8
Dundee Contemporary Arts, Nethergate, Dundee, DD1 4EA	1.0%	4	1.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Odeon Luxe Dundee, Tayside, Douglas Road, Dundee, DD4 7SN	4.0%	16	3.4%	9	5.2%	2	0.0%	0	0.0%	0	13.4%	6
Perth Playhouse, Murray Street, Perth, PH1 5PJ	28.8%	115	38.9%	97	12.5%	5	15.1%	8	25.6%	5	0.7%	0
The Birks Cinema, Dunkeld Street, Aberfeldy, PH15 2DA	2.9%	12	0.0%	0	0.0%	0	0.8%	0	56.7%	11	0.0%	0
The Kino Cinema, Church Street, Glenrothes, KY7 5ND	0.2%	1	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0
Aberfeldy Town Centre	1.3%	5	0.0%	0	0.0%	0	4.4%	2	14.0%	3	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair')	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	6.2%	25	1.0%	2	1.3%	0	0.0%	0	0.0%	0	52.4%	22
Dunfermline Town Centre	3.0%	12	0.0%	0	33.0%	12	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	1.0%	4	1.5%	4	0.6%	0	0.0%	0	0.0%	0	0.0%	0
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.2%	1	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre	28.6%	114	42.1%	105	16.6%	6	4.2%	2	3.7%	1	0.0%	0
Pitlochry Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	5.2%	21	0.0%	0	0.0%	0	40.7%	21	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chalmers Filmhouse, Queen's Drive, Arbroath, DD11 1QD	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	2
Macrobert Arts Centre, University of Stirling, Stirling, FK9 4LA	0.4%	2	0.0%	0	0.0%	0	3.2%	2	0.0%	0	0.0%	0
Odeon, Fife Leisure Park, Whimbrel Place, Dunfermline, KY11 8EX	1.2%	5	0.0%	0	13.1%	5	0.0%	0	0.0%	0	0.0%	0
Phoenix Centre, St James Road, Glasgow, G4 0NT	0.2%	1	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Vue, Forthside Way, Stirling, FK8 1QZ	3.1%	12	0.0%	0	0.0%	0	23.9%	12	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Vue, Livingston Designer Outlet, Livingston, EH54 6QX	0.1%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	3.6%	14	2.0%	5	14.0%	5	1.5%	1	0.0%	0	8.1%	3
Weighted base:		400		250		36		51		20		42
Sample:		293		115		55		47		36		40

Q33 Where do you visit most often for THEATRE?

Those that said 'Theatre' at least 'Once a year' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Birnam Arts Centre, Station Road, Birnam, Dunkeld, PH8 0DS	0.4%	1	0.0%	0	0.0%	0	0.0%	0	6.2%	1	0.0%	0
Perth Concert Hall, Mill Street, Perth, PH1 5HZ	8.7%	27	10.8%	21	0.7%	0	7.9%	4	3.3%	1	7.3%	2
Perth Theatre, Mill Street, Perth, PH1 5HZ	26.0%	81	33.9%	66	14.8%	4	8.5%	4	17.0%	4	15.4%	3
Pitlochry Festival Theatre, Port na Craig, Pitlochry, PH16 5DR	6.3%	20	2.2%	4	0.7%	0	0.9%	0	50.3%	11	15.6%	3
Strathearn Arts, Comrie Street, Crieff, PH7 4AX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Birks Cinema, Dunkeld Street, Aberfeldy, PH15 2DA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberfeldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge of Earn Town Centre (aka 'The Brig')	0.1%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	6.4%	20	8.5%	17	1.7%	0	2.0%	1	3.3%	1	6.9%	2
Dunfermline Town Centre	0.9%	3	0.0%	0	10.1%	3	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	17.7%	55	11.8%	23	37.7%	11	35.2%	16	0.0%	0	26.3%	6
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	5.4%	17	3.2%	6	1.7%	0	14.4%	6	8.9%	2	7.6%	2
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.5%	1	0.0%	0	5.2%	1	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.3%	1	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre	18.2%	57	25.0%	49	5.7%	2	10.8%	5	4.8%	1	3.9%	1
Pitlochry Town Centre	1.1%	3	0.0%	0	0.0%	0	6.7%	3	1.4%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.1%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberdeen City Centre	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.8%	2
Aberuthven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abingdon-on-Thames Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barnard Castle Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardney Estate, Butterstone, Dunkeld PH8 0EY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	1.0%	3	0.4%	1	0.0%	0	5.0%	2	0.0%	0	0.0%	0
Cheltenham Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Culross Palace, Culross, Dunfermline KY12 8JH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dirnanean Gardens, Dirnanean House, Enochdhu, Blairgowrie,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
PH10 7PD												
Dublin City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dumfries Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fergusson Gallery, Marshall Place, Perth, PH2 8NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fort William Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hopetoun House, Queensferry, South Queensferry, EH30 9RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0
Liverpool City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Macrobert Arts Centre, University of Stirling, Stirling, FK9 4LA	0.1%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Meigle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murrayfield Stadium, Roseburn Street, Edinburgh, EH12 5PJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newcastle upon Tyne City Centre	0.5%	2	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth Museum & Art Gallery, George Street, Perth, PH1 5LB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vindolanda, Hadrian's Wall, Hexham, NE47 7JN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
York City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	5.4%	17	3.4%	7	18.0%	5	6.0%	3	4.8%	1	6.0%	1
Weighted base:		313		195		28		45		23		22
Sample:		298		115		53		51		43		36

Q34 Where do you visit most often for CONCERTS?
Those that said 'Concerts' at least 'Once a year' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Birnam Arts Centre, Station Road, Birnam, Dunkeld, PH8 0DS	0.4%	1	0.0%	0	0.0%	0	0.0%	0	7.4%	1	0.0%	0
Perth Concert Hall, Mill Street, Perth, PH1 5HZ	29.8%	97	37.6%	77	11.8%	4	11.1%	6	17.8%	3	35.6%	8
Perth Theatre, Mill Street, Perth, PH1 5HZ	0.4%	1	0.4%	1	0.0%	0	0.8%	0	0.0%	0	1.3%	0
Pitlochry Festival Theatre, Port na Craig, Pitlochry, PH16 5DR	0.4%	1	0.0%	0	0.0%	0	0.0%	0	6.9%	1	0.0%	0
Strathearn Arts, Comrie Street, Crieff, PH7 4AX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Birks Cinema, Dunkeld Street, Aberfeldy, PH15 2DA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberfeldy Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair')	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.1%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	4.5%	15	5.9%	12	0.0%	0	0.0%	0	0.0%	0	12.2%	3
Dunfermline Town Centre	0.2%	1	0.0%	0	2.2%	1	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	5.4%	18	1.2%	2	21.8%	7	7.2%	4	1.7%	0	20.5%	5
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	31.1%	101	33.0%	67	26.0%	8	32.5%	16	51.8%	10	1.3%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.4%	1	0.0%	0	4.1%	1	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre	9.7%	32	10.8%	22	12.0%	4	8.0%	4	0.0%	0	8.1%	2
Pitlochry Town Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	1.8%	6	0.0%	0	0.0%	0	12.0%	6	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberdeen City Centre	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1
Aberuthven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abingdon-on-Thames Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0
Barnard Castle Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardney Estate, Butterstone, Dunkeld PH8 0EY	0.1%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0
Central London / West End	0.7%	2	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheltenham Town Centre	0.1%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Culross Palace, Culross, Dunfermline KY12 8JH	0.5%	2	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dirnanean Gardens, Dirnanean House, Enochdhu, Blairgowrie,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
PH10 7PD												
Dublin City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0
Dumfries Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fergusson Gallery, Marshall Place, Perth, PH2 8NS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0
Fort William Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hopetoun House, Queensferry, South Queensferry, EH30 9RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0
Liverpool City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Macrobert Arts Centre, University of Stirling, Stirling, FK9 4LA	0.1%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Meigle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murrayfield Stadium, Roseburn Street, Edinburgh, EH12 5PJ	0.3%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Newcastle upon Tyne City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth Museum & Art Gallery, George Street, Perth, PH1 5LB	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vindolanda, Hadrian's Wall, Hexham, NE47 7JN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
York City Centre	0.3%	1	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	12.3%	40	9.2%	19	22.2%	7	22.6%	11	5.7%	1	10.3%	2
Weighted base:		325		204		31		50		19		22
Sample:		287		109		55		52		31		40

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	

Q35 Where do you visit most often for BINGO?
Those that said 'Bingo' at least 'Once a year' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Buzz Bingo Dundee, The Stack Retail Park, Lochee, Dundee, DD2 3XN	6.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.4%	2
Carlton Bingo, Fife Leisure Park, Dunfermline, KY11 8EX	2.9%	1	0.0%	0	34.6%	1	0.0%	0	0.0%	0	0.0%	0
Carlton Bingo, Allan Park, Stirling, FK8 2LT	5.5%	2	0.0%	0	0.0%	0	83.9%	2	0.0%	0	0.0%	0
Club 3000 Bingo, Carrick Gate, Glenrothes, KY7 5NT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mecca Bingo (Dundee Douglasfield), Eclipse Leisure Park, Dundee, DD4 8JX	15.7%	6	22.3%	5	0.0%	0	0.0%	0	0.0%	0	9.0%	1
Mecca Bingo (Dundee Playhouse), Nethergate, Dundee, DD1 4EH	13.5%	5	6.3%	1	0.0%	0	0.0%	0	0.0%	0	47.9%	4
Premier Bingo, High St, Cowdenbeath, KY4 9QA	3.9%	1	6.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier Bingo, Mill St, Alloa, FK10 1DY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Premier Bingo, S Methven St, Perth, PH1 5NU	2.0%	1	3.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberfeldy Town Centre	2.0%	1	0.0%	0	0.0%	0	0.0%	0	69.8%	1	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair')	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	0
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	1.0%	0	0.0%	0	0.0%	0	16.1%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	0.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.9%	0
Dunfermline Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	1.3%	0	0.0%	0	15.4%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre	38.5%	14	61.9%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pitlochry Town Centre	0.9%	0	0.0%	0	0.0%	0	0.0%	0	30.2%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Club 3000 Bingo, Carberry Place, Kirkcaldy, KY1 3NQ	1.3%	0	0.0%	0	15.4%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.9%	1	0.0%	0	34.6%	1	0.0%	0	0.0%	0	0.0%	0
Weighted base:		37		23		3		2		1		7

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Sample:		27		11		4		2		2		8

Q36 Where do you visit most often for TEN-PIN BOWLING?
Those that said 'Ten-pin bowling' at least 'Once a year' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
ProBowl Glenrothes, Albany Gate, Glenrothes KY7 5NP	2.3%	2	0.0%	0	13.0%	2	0.0%	0	0.0%	0	0.0%	0
Hollywood Bowl Dunfermline, Fife Leisure Park, Dunfermline, KY11 8EX	21.6%	20	17.0%	10	46.9%	8	0.0%	0	83.9%	2	0.0%	0
AMF Bowling, Riverside, Stirling, FK8 1UE	8.5%	8	0.0%	0	0.0%	0	63.6%	8	0.0%	0	0.0%	0
Aberfeldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	1.0%	1	1.2%	1	1.2%	0	0.0%	0	0.0%	0	0.0%	0
Dunfermline Town Centre	18.1%	16	20.5%	12	25.2%	4	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	1.9%	2	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	0.4%	0	0.0%	0	0.0%	0	0.0%	0	16.1%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	5.6%	5	8.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre	1.9%	2	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pitlochry Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	4.5%	4	0.0%	0	0.0%	0	33.2%	4	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Noahs Ark, Old Gallows Road, Perth, PH1 1QE	10.6%	10	16.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	23.5%	21	31.1%	19	13.7%	2	3.2%	0	0.0%	0	0.0%	0
Weighted base:		91		60		16		12		2		0
Sample:		48		17		20		9		2		0

Column %ges.

Q37 Where do you visit most often for MUSEUM OR PLACE OF HISTORICAL / CULTURAL INTEREST?
Those that said 'Museum or place of historical / cultural interest' at least 'Once a year' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Birnam Arts Centre, Station Road, Birnam, Dunkeld, PH8 0DS	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth Concert Hall, Mill Street, Perth, PH1 5HZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth Theatre, Mill Street, Perth, PH1 5HZ	0.9%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pitlochry Festival Theatre, Port na Craig, Pitlochry, PH16 5DR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Strathearn Arts, Comrie Street, Crieff, PH7 4AX	0.2%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
The Birks Cinema, Dunkeld Street, Aberfeldy, PH15 2DA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberfeldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	13.1%	34	11.6%	18	2.7%	1	9.3%	4	0.0%	0	56.1%	11
Dunfermline Town Centre	0.1%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0
Edinburgh City Centre	16.1%	41	6.0%	9	43.2%	11	36.2%	16	22.0%	3	10.1%	2
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	5.0%	13	1.6%	2	3.5%	1	16.7%	7	12.5%	2	1.4%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.2%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre	42.8%	110	59.9%	91	8.5%	2	16.1%	7	39.0%	6	17.0%	3
Pitlochry Town Centre	0.7%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.3%	1	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberdeen City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberuthven Village Centre	0.3%	1	0.0%	0	0.0%	0	2.1%	1	0.0%	0	0.0%	0
Abingdon-on-Thames Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0
Abroath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barnard Castle Town Centre	0.2%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Cardney Estate, Butterstone, Dunkeld PH8 0EY	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheltenham Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Culross Palace, Culross, Dunfermline KY12 8JH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dirnanean Gardens, Dirnanean House, Enochdhu, Blairgowrie,	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
PH10 7PD												
Dublin City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dumfries Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0
Dunblane Town Centre	0.2%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Falkland Village Centre	1.5%	4	2.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fergusson Gallery, Marshall Place, Perth, PH2 8NS	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0
Forfar Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fort William Town Centre	0.3%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hopetoun House, Queensferry, South Queensferry, EH30 9RW	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1
Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	0
Macrobert Arts Centre, University of Stirling, Stirling, FK9 4LA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Meigle Village Centre	0.2%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Murrayfield Stadium, Roseburn Street, Edinburgh, EH12 5PJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newcastle upon Tyne City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth Museum & Art Gallery, George Street, Perth, PH1 5LB	1.9%	5	3.0%	5	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Vindolanda, Hadrian's Wall, Hexham, NE47 7JN	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1
York City Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	15.0%	38	12.3%	19	39.5%	10	13.1%	6	22.3%	3	2.9%	1
Weighted base:		256		152		25		44		15		20
Sample:		248		86		53		50		27		32

Q38 Where do you visit most often for EVENTS?
Those that said 'Events (e.g. music festivals, fairs, etc)' at least 'Once a year' Q27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Kinnoull Hill Woodland Park, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkgate Park, Kinross	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
MacRosty Park, Comrie Road, Crieff	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Millennium Park, Muirhall Road, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Rodney Gardens, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
South Inch Park and Gardens, Perth	1.8%	5	2.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Victoria Park, Taybridge Terrace, Aberfeldy	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberfeldy Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre (aka 'Blair') (includes Tesco Superstore, Welton Road)	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	1
Bridge of Earn Town Centre (aka 'The Brig')	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.3%	1	0.0%	0	0.0%	0	3.5%	1	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	0.5%	1	0.0%	0	0.0%	0	5.8%	1	0.0%	0	0.0%	0
Cupar Town Centre	0.2%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	2.3%	6	1.5%	2	0.0%	0	0.0%	0	0.0%	0	13.9%	3
Dunfermline Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	0.6%	1	0.0%	0	0.0%	0	0.0%	0	9.1%	1	0.0%	0
Edinburgh City Centre	8.3%	21	3.4%	5	11.6%	3	20.2%	4	4.9%	1	28.0%	7
Errol Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	21.2%	53	26.5%	42	9.2%	2	18.4%	4	12.3%	2	8.2%	2
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre (includes Kingdom Shopping Centre)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	0.9%	2	1.1%	2	1.7%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre (includes St John's Shopping Centre and M&S, High Street)	30.1%	75	39.9%	64	13.1%	4	20.2%	4	13.1%	2	4.0%	1
Pitlochry Town Centre	0.4%	1	0.0%	0	0.0%	0	0.0%	0	2.1%	0	2.8%	1
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	2.0%	5	2.4%	4	0.0%	0	0.0%	0	2.1%	0	2.8%	1
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	0.2%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0
Gallagher Retail Park, East Dock Street, Dundee (Next, TK Maxx, Matalan, Cancer Research, M&S Food)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond RETAIL Park, Perth (M&S Foodhall, Aldi, Tiso, Jollyes Pets, British Heart Foundation)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond TRADE Park, Perth (Screwfix, Toolstation, Furniture Factory, Habro Country	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Store)												
Kingsway West Retail Park, Dundee (Tesco, B&M, Currys, Dunelm, Oak Furnitureland & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Saltire Retail Park, Glenrothes (Homebase, Matalan, Carpetright, Pet Hut & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling (B&Q, Morrisons, Pets at Home, DFS, Wren Kitchens & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Catherines Retail Park, St Catherine's Road, Perth (Home Bargains, B&M, The Range, Currys, TK Maxx & more)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Stack Retail Park, Dundee (Aldi, Home Bargains, The Range, Smyths)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberdeen Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberuthven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchtermuchty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Balquhidder Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bannockburn Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Beveridge Park, Abbotshall Road, Kirkcaldy, KY2 5NE	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blackpool Town Centre	1.0%	2	0.0%	0	0.0%	0	0.0%	0	11.0%	2	2.8%	1
Blair Atholl Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blair Drummond Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowhill Bowling Club, Cardenden, Lochgelly, KY5 0BQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Boyle Park, Threewells Drive, Forfar, DD8 1EZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Brechin Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge Of Allen Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Burrelton Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Camperdown Wildlife Centre, Coupar Angus Road, Dundee, DD2 4TF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cardenden Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Carse of Gowrie Local Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caulders Garden Centre Kinross, Turfhills, Kinross, KY13 0NQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Central London / West End	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cheltenham Town Centre	0.2%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0
Cherrybank Inn, Glasgow Road, Perth, PH2 0NA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Craigie Hill Golf Club, Cherrybank, Perth, PH2 0N	0.3%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Craigie Park, Craigie Road, Ayr, KA8 0HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Road, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dalgety Bay Town Centre	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Dalkeith Country Park, Via King's Gate, Dalkeith, Edinburgh, EH22 1ST	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Davie Park, Ashgorve Road, Rattray, PH10 7DA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Diamond Jubilee Play Park, Manse Road, Lauder, TD2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
6QL												
Dobbies Garden Centre, Drip Road, Stirling, FK9 4UF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dobbies Garden Centre, Huntingtower Park, Perth, PH1 3JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Donington Park, Castle Donington, Derby, DE74 2BN	0.4%	1	0.0%	0	3.9%	1	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.2%	0	0.0%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0
Dunkeld & Birnam Golf Club, Fungarth, Dunkeld, PH8 0ES	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunning Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Falkland Village Centre	0.5%	1	0.0%	0	4.7%	1	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park, Chapel Park, Kirkcaldy, KY2 6QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Golf Range, Brechin Road, Forfar, DD8 3R	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Loch Country Park, Craig O Loch Road, Forfar, DD8 1BT	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Forfar Town Centre	0.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	2
Garvock Local Centre, Dunfermline	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glencarse Village	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenfarg Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gloagburn Farm Shop and Café, Tibbermore, Perth, PH1 1QL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gorgie Local Centre, Edinburgh	0.1%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0
Guildtown Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Highland Safaris, B846, Aberfeldy, PH15 2JQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
House of Bruar, B8079, Pitagowan, PH18 5TW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inveralmond Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inverness City Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	0	0.0%	0
Kelty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kenmore Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kilnloch Rannoch Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
King James VI Golf Cub, Moncreiffe Island, Perth, PH2 8NR	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinglassie Village Centre	0.2%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0
Kings Park, Albert Place, Stirling, FK8 2RF	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kippendavie And Cauldhame Estates, Sheriffmuir, Dunblane, FK15 0LP	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ladybank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Laighhills Park, Laighills Park, Dunblane, FK15 0AU	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Larghan Victory Park, Coupar Angus, Blairgowrie, PH13 9ER	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leslie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Linlithgow Town Centre	0.4%	1	0.0%	0	0.0%	0	4.1%	1	0.0%	0	0.0%	0
Loch Leven National Nature Reserve, Kinross, KY13 8US	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Loch Leven's Larder & Channel Farm, Kinross, KY13 9HD	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lochearnhead Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lochee Park, Ancrum Road, Dundee, DD2 2HN	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Lochore Meadows (Park), Crosshill, Lochgelly, KY5 8BA	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Meikleour Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Memus Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Moulin Hotel, Kirkmichael Road, Moulin, Pitlochry, PH16 5EW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murrayfield Stadium, Roseburn Street, Edinburgh, EH12 5PJ	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	1
Newburgh Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Newtyle Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
North Inch (Park), Barossa Place, Perth, PH1 5HG	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
North Muirton Local Centre, Perth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peel Farm Coffee & Crafts, Bridgend of Lintrathen, Kirriemuir, DD8 5JJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pitcairngreen Village Centre	0.3%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pittencrief Park, Pittencrieff Street, Dunfermline, KY12 8QH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Quarrymill Woodland Park, Isla Road, Perth, PH2 7HQ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ravenscraig Park, Dysart Road, Kirkcaldy, KY1 2AZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Riverside Inn, Riverside Drive, Dundee, DD2 1UH	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Palace, Scone, Perth, PH2 6BD	5.2%	13	6.2%	10	1.7%	0	0.0%	0	15.8%	2	0.0%	0
Scotlandwell Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Andrews Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Strathmiglo Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Strathmore Golf Centre, Leroch, Alyth, Blairgowrie, PH11 8NZ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tarbert Town Centre, Isle of Harris	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Superstore, Edinburgh Road, Perth, PH2 8DX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Drovers Inn, A82, Inverarnan, G83 7DX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thornhill Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Vane Farm Nature Reserve, B9097, Kinross, KY13 9LX	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Victory Park, Ardler Road, Meigle, PH12 8RW	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Viewlands Park, Cornhill Way, Perth, PH1 1LJ	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroad	1.5%	4	2.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	19.2%	48	12.9%	21	48.3%	13	22.5%	5	27.6%	4	20.2%	5
Weighted base:		248		160		27		22		16		24
Sample:		180		72		42		19		18		29

GEN Gender of respondent:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
Male	33.9%	343	32.0%	184	36.2%	30	32.7%	47	40.2%	32	38.0%	50
Female	66.1%	670	68.0%	390	63.8%	54	67.3%	96	59.8%	48	62.0%	81
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

AGE Could I ask how old you are please?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
18 to 24	5.6%	57	5.9%	34	5.7%	5	3.2%	5	2.4%	2	9.0%	12
25 to 34	12.6%	128	14.1%	81	12.7%	11	6.3%	9	7.1%	6	16.6%	22
35 to 44	16.0%	162	16.9%	97	18.7%	16	11.4%	16	2.8%	2	23.1%	30
45 to 54	20.9%	211	22.4%	129	16.4%	14	26.9%	38	21.1%	17	10.3%	13
55 to 64	18.7%	190	17.0%	97	23.0%	19	23.2%	33	21.5%	17	17.2%	23
65 +	26.2%	265	23.7%	136	23.5%	20	29.0%	41	45.2%	36	23.8%	31
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

PEO1_1 How many people are there in your household who are aged between 0-15 years?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
None	77.2%	782	71.5%	411	83.1%	70	87.2%	124	92.1%	74	77.8%	102
One	10.6%	108	13.5%	77	10.0%	8	3.3%	5	5.8%	5	9.5%	12
Two	8.7%	88	10.8%	62	5.2%	4	6.6%	9	2.1%	2	7.4%	10
Three	2.6%	27	2.5%	14	1.7%	1	2.8%	4	0.0%	0	5.2%	7
Four	0.9%	9	1.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Five	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Six or more	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

PEO1_2 How many people are there in your household who are aged 16 years or over?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
One	27.8%	282	26.9%	154	31.6%	27	25.0%	36	26.3%	21	33.5%	44
Two	48.9%	495	50.3%	289	39.2%	33	49.0%	70	51.6%	42	46.9%	62
Three	14.6%	148	14.6%	84	19.6%	16	12.7%	18	21.2%	17	9.3%	12
Four	7.8%	79	7.4%	43	9.6%	8	10.4%	15	0.9%	1	9.6%	13
Five	1.0%	10	0.8%	5	0.0%	0	3.0%	4	0.0%	0	0.7%	1
Six or more	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

PEO2_1 How many people aged 16-64 are there in your household who are in part time employment (up to 29 hours per week)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
None	77.1%	781	74.8%	429	83.0%	70	72.6%	104	79.8%	64	86.4%	114
One	16.6%	168	17.6%	101	16.7%	14	18.0%	26	15.8%	13	11.1%	15
Two	5.4%	55	7.0%	40	0.2%	0	5.8%	8	3.4%	3	2.4%	3
Three	0.5%	5	0.3%	2	0.0%	0	2.0%	3	0.9%	1	0.0%	0
Four	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Five	0.2%	2	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Six or more	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

PEO2_2 How many people aged 16-64 are there in your household who are in full time employment - 30 or more hours per week?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
None	43.8%	444	41.1%	236	45.5%	38	52.1%	74	53.9%	44	39.3%	52
One	28.0%	283	31.3%	180	18.3%	15	23.6%	34	20.5%	17	29.0%	38
Two	18.7%	189	17.9%	103	27.3%	23	15.1%	22	17.7%	14	21.2%	28
Three	7.9%	80	8.6%	50	7.6%	6	9.1%	13	7.0%	6	4.3%	6
Four	1.5%	15	1.0%	6	1.3%	1	0.0%	0	0.9%	1	5.6%	7
Five	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Six or more	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

PEO2_3 How many people aged 16-64 are there in your household who are unemployed but available or seeking employment?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
None	88.2%	894	87.4%	502	87.2%	73	89.3%	127	93.3%	75	88.0%	116
One	9.8%	99	10.5%	61	12.8%	11	7.4%	11	6.7%	5	8.9%	12
Two	2.0%	20	2.0%	12	0.0%	0	3.3%	5	0.0%	0	3.0%	4
Three	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Four	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Five	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Six or more	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
QUOTA Zone												
Zone 1	56.7%	574	100.0%	574	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	8.3%	84	0.0%	0	100.0%	84	0.0%	0	0.0%	0	0.0%	0
Zone 3	14.1%	143	0.0%	0	0.0%	0	100.0%	143	0.0%	0	0.0%	0
Zone 4	8.0%	81	0.0%	0	0.0%	0	0.0%	0	100.0%	81	0.0%	0
Zone 5	13.0%	131	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	131
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5	
PC Postcode Sector												
DD2 5	1.8%	18	3.1%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0
DD8 1	6.2%	63	0.0%	0	0.0%	0	0.0%	0	0.0%	0	47.8%	63
FK15 0	3.2%	32	0.0%	0	0.0%	0	22.7%	32	0.0%	0	0.0%	0
FK15 9	1.8%	18	0.0%	0	0.0%	0	13.0%	18	0.0%	0	0.0%	0
FK19 8	0.3%	3	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0
FK21 8	0.9%	9	0.0%	0	0.0%	0	6.6%	9	0.0%	0	0.0%	0
KY13 0	0.7%	8	0.0%	0	9.0%	8	0.0%	0	0.0%	0	0.0%	0
KY13 8	1.9%	19	0.0%	0	22.8%	19	0.0%	0	0.0%	0	0.0%	0
KY13 9	0.8%	8	0.0%	0	10.0%	8	0.0%	0	0.0%	0	0.0%	0
KY14 6	0.9%	9	0.0%	0	10.9%	9	0.0%	0	0.0%	0	0.0%	0
KY14 7	1.1%	11	0.0%	0	13.4%	11	0.0%	0	0.0%	0	0.0%	0
KY4 0	1.1%	11	0.0%	0	13.6%	11	0.0%	0	0.0%	0	0.0%	0
KY5 0	1.0%	10	0.0%	0	11.6%	10	0.0%	0	0.0%	0	0.0%	0
KY6 3	0.7%	7	0.0%	0	8.6%	7	0.0%	0	0.0%	0	0.0%	0
PH1 1	9.3%	94	16.4%	94	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH1 2	6.3%	64	11.2%	64	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH1 3	3.4%	34	6.0%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH1 4	1.9%	20	3.4%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH1 5	2.5%	26	4.5%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH10 6	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	8
PH10 7	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.2%	17
PH11 8	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	10
PH12 8	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.3%	12
PH13 9	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	16.0%	21
PH14 9	0.5%	5	1.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH15 2	2.1%	22	0.0%	0	0.0%	0	0.0%	0	26.7%	22	0.0%	0
PH16 5	3.3%	33	0.0%	0	0.0%	0	0.0%	0	41.4%	33	0.0%	0
PH18 5	0.8%	8	0.0%	0	0.0%	0	0.0%	0	10.4%	8	0.0%	0
PH2 0	3.5%	35	6.1%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH2 6	8.7%	88	15.4%	88	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH2 7	9.7%	98	17.1%	98	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH2 8	1.9%	19	3.4%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH2 9	7.1%	72	12.5%	72	0.0%	0	0.0%	0	0.0%	0	0.0%	0
PH3 1	3.4%	34	0.0%	0	0.0%	0	24.0%	34	0.0%	0	0.0%	0
PH4 1	1.1%	11	0.0%	0	0.0%	0	7.6%	11	0.0%	0	0.0%	0
PH5 2	1.4%	14	0.0%	0	0.0%	0	9.8%	14	0.0%	0	0.0%	0
PH6 2	0.6%	6	0.0%	0	0.0%	0	4.3%	6	0.0%	0	0.0%	0
PH7 3	0.9%	9	0.0%	0	0.0%	0	6.6%	9	0.0%	0	0.0%	0
PH7 4	0.4%	4	0.0%	0	0.0%	0	3.0%	4	0.0%	0	0.0%	0
PH8 0	1.3%	13	0.0%	0	0.0%	0	0.0%	0	16.2%	13	0.0%	0
PH9 0	0.4%	4	0.0%	0	0.0%	0	0.0%	0	5.4%	4	0.0%	0
Weighted base:		1013		574		84		143		81		131
Sample:		1013		326		175		175		150		187

Column %ges.

Perth & Kinross Household Survey for CPW Planning

Q16 Now thinking about ALL centres, including the ones previously mentioned - Which centre does your household visit most often for shopping and services?

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Aberfeldy Town Centre	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	19	0.0%	0	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	17
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre	5.2%	52	0.0%	0	100.0%	52	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge of Earn Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dundee City Centre	9.1%	92	0.0%	0	0.0%	0	100.0%	92	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunfermline Town Centre	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Errol Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	1.9%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	20	0.0%	0
Kirkcaldy Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre	52.4%	531	100.0%	531	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pitlochry Town Centre	2.8%	28	0.0%	0	0.0%	0	0.0%	0	100.0%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	3.6%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alloa Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ballinluig Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Chapel Park, Kirkcaldy, KY2 6QL																								
Forfar Town Centre	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	20	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling, FK7 7TL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Catherines Retail Park, Perth, PH1 5XA	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't visit ANY centres for shopping or services)	3.3%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1013		531		52		92		28		37		36		12		20		19		20		17
Sample:		1013		425		76		63		50		46		44		34		31		30		22		21

Meanscore: [More often = 1, About the same = 0, Less often = -1]

Q17 Compared to before the Covid-19 pandemic, how frequently do you visit (CENTRE MENTIONED AT Q16) now? [PR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
More often	7.7%	75	4.2%	22	29.9%	16	1.0%	1	7.6%	2	8.4%	3	9.8%	4	12.2%	1	16.5%	3	20.7%	4	3.4%	1	12.2%	2
About the same	55.9%	540	53.5%	284	51.1%	27	65.8%	61	52.2%	15	28.6%	11	60.7%	22	61.2%	7	77.7%	16	64.0%	12	80.9%	16	83.2%	14
Less often	35.4%	341	40.8%	217	17.0%	9	33.1%	31	40.2%	11	63.0%	23	29.5%	11	26.7%	3	5.7%	1	15.3%	3	15.6%	3	4.6%	1
(Don't know)	1.0%	9	1.5%	8	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*-0.28*		*-0.37*		*0.13*		*-0.32*		*-0.33*		*-0.55*		*-0.20*		*-0.15*		*0.11*		*0.05*		*-0.12*		*0.08*
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21

Q18 How do you normally travel to (CENTRE MENTION AT Q16)?

Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Car / van (as driver)	64.9%	626	65.2%	346	70.8%	37	66.6%	62	58.2%	17	63.4%	23	73.9%	27	70.5%	9	34.8%	7	67.8%	13	64.0%	12	48.6%	8
Car / van (as passenger)	9.4%	91	9.7%	52	2.2%	1	9.8%	9	17.6%	5	20.0%	7	2.1%	1	14.0%	2	21.4%	4	3.4%	1	1.0%	0	10.0%	2
Bus, minibus or coach	10.2%	99	11.5%	61	7.4%	4	23.6%	22	11.0%	3	2.1%	1	3.2%	1	15.5%	2	0.0%	0	0.0%	0	1.0%	0	2.3%	0
Motorcycle, scooter or moped	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.7%	7	0.5%	2	0.0%	0	0.0%	0	0.0%	0	6.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1	0.0%	0
Walk	12.1%	117	11.0%	58	16.2%	8	0.0%	0	12.1%	3	0.0%	0	19.7%	7	0.0%	0	43.9%	9	28.8%	6	27.8%	5	39.2%	7
Train	1.2%	12	0.1%	1	0.0%	0	0.0%	0	0.0%	0	8.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.1%	1	0.1%	1	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / disability vehicle	0.3%	3	0.1%	1	3.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	0.9%	9	1.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21

Q19 What activities do you do when you visit (CENTRE MENTIONED AT Q16)? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Food shopping	50.6%	488	50.4%	268	83.2%	44	33.4%	31	77.2%	22	38.5%	14	45.7%	17	82.1%	10	77.5%	16	74.7%	14	60.1%	12	65.1%	11
Non-food shopping	53.4%	515	53.3%	283	74.4%	39	64.9%	60	22.4%	6	68.5%	25	44.7%	16	82.1%	10	30.5%	6	56.8%	11	15.0%	3	12.2%	2
Services - Financial e.g. bank, building society, cash machine	8.3%	80	9.6%	51	11.4%	6	2.6%	2	6.1%	2	11.9%	4	12.0%	4	5.0%	1	8.9%	2	1.7%	0	35.4%	7	0.0%	0
Services - Health e.g. doctor, dentist, hospital, opticians	8.4%	82	8.2%	44	6.6%	3	4.7%	4	14.8%	4	1.0%	0	5.7%	2	1.7%	0	1.4%	0	24.1%	5	26.7%	5	27.2%	5
Services - Other e.g. laundrette, hairdresser, vets, recycling	6.3%	60	5.8%	31	6.6%	3	5.9%	5	8.3%	2	2.1%	1	4.6%	2	0.0%	0	0.0%	0	1.7%	0	13.4%	3	7.6%	1
Accessing transport (e.g. using bus / tube / train station)	0.4%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buying fuel (visiting petrol station)	1.8%	18	0.9%	5	14.9%	8	1.8%	2	1.1%	0	1.0%	0	1.1%	0	1.7%	0	1.4%	0	3.9%	1	7.3%	1	0.0%	0
Cafes / coffee shops	20.5%	198	23.9%	127	22.6%	12	12.0%	11	20.1%	6	11.7%	4	20.4%	7	21.1%	3	6.2%	1	11.2%	2	10.6%	2	17.6%	3
Cinema	4.0%	38	4.4%	23	0.0%	0	9.4%	9	0.0%	0	1.0%	0	0.0%	0	11.5%	1	0.0%	0	11.2%	2	0.0%	0	0.0%	0
Family entertainment venue (e.g. bowling alley, ice rink, etc.).	0.6%	6	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0
Gym / leisure centre / swimming pool	2.7%	26	2.5%	13	6.3%	3	0.3%	0	2.6%	1	0.0%	0	8.2%	3	0.0%	0	4.8%	1	16.6%	3	0.0%	0	2.3%	0
Library	1.1%	10	0.5%	2	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	7.6%	1
Live music venues / gigs	0.6%	6	0.9%	5	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Meeting family / friends in centre	4.6%	44	5.0%	26	5.5%	3	0.7%	1	12.1%	3	0.0%	0	0.0%	0	15.4%	2	1.4%	0	5.6%	1	13.2%	3	0.0%	0
Museums / galleries	0.6%	6	0.4%	2	0.0%	0	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Outdoor sports venue (e.g. tennis / basketball court / football / cricket pitch)	1.2%	11	1.5%	8	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	0
Parks / green spaces	0.8%	8	1.3%	7	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Place of worship	1.0%	9	1.1%	6	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	1.7%	0	0.0%	0	2.3%	0
Post Office	0.9%	9	0.1%	1	0.5%	0	1.6%	2	1.1%	0	0.0%	0	0.0%	0	1.7%	0	7.5%	2	0.0%	0	1.0%	0	7.6%	1
Pubs / bars	2.6%	25	3.0%	16	1.8%	1	0.0%	0	1.1%	0	0.0%	0	0.0%	0	3.4%	0	0.0%	0	1.7%	0	6.1%	1	0.0%	0
Restaurants	13.4%	129	15.1%	80	2.5%	1	15.1%	14	8.2%	2	5.9%	2	9.1%	3	11.5%	1	2.9%	1	10.5%	2	1.0%	0	2.3%	0
School / college / university	0.6%	6	0.0%	0	0.0%	0	4.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	2	0.0%	0	0.0%	0
Takeaways / fast food	1.5%	15	1.7%	9	0.0%	0	2.2%	2	1.1%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	1.7%	0	14.7%	3	0.0%	0
Theatres / shows	1.2%	12	1.6%	8	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk / walk the dog	4.5%	43	4.6%	25	4.5%	2	0.0%	0	4.0%	1	0.0%	0	5.6%	2	1.7%	0	7.5%	2	0.0%	0	0.0%	0	2.3%	0
Window shopping / browsing	10.6%	103	12.8%	68	4.5%	2	10.7%	10	7.4%	2	10.5%	4	4.0%	1	1.7%	0	1.4%	0	0.0%	0	0.0%	0	10.0%	2
Work	5.5%	53	4.8%	26	1.3%	1	9.5%	9	12.5%	4	0.0%	0	10.5%	4	0.0%	0	6.6%	1	13.6%	3	1.0%	0	12.0%	2
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Play bingo	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
(Don’t know / can't remember)	2.6%	25	1.8%	10	0.0%	0	13.3%	12	0.0%	0	1.0%	0	0.0%	0	0.0%	0	10.1%	2	0.0%	0	2.4%	0	0.0%	0
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21

Meanscore: [Time in minutes]

Q20 How long do you normally spend in (CENTRE MENTIONED AT Q16) when visiting?
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Less than 30 mins	6.9%	66	3.3%	17	7.3%	4	0.0%	0	28.4%	8	0.0%	0	9.1%	3	9.5%	1	14.7%	3	18.3%	4	8.9%	2	32.5%	5
30 - 59 mins	14.2%	137	14.0%	75	25.7%	13	5.7%	5	23.1%	7	16.7%	6	19.5%	7	30.0%	4	11.9%	2	18.5%	4	4.5%	1	36.2%	6
1 hour - 1 hour 59 mins	39.9%	385	45.6%	242	41.4%	22	20.1%	19	27.9%	8	49.7%	18	49.6%	18	46.6%	6	42.1%	8	30.0%	6	61.9%	12	29.0%	5
2 hour - 2 hours 59 mins	24.7%	239	25.3%	134	18.3%	10	51.1%	47	10.9%	3	25.0%	9	6.0%	2	8.4%	1	28.0%	6	14.0%	3	13.2%	3	0.0%	0
3 hour - 3 hours 59 mins	4.7%	45	4.9%	26	1.4%	1	15.2%	14	2.3%	1	3.5%	1	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
4 hours or more	7.1%	69	4.6%	24	3.4%	2	6.4%	6	0.0%	0	3.1%	1	9.1%	3	3.9%	0	3.3%	1	11.9%	2	6.1%	1	0.0%	0
(Don’t know / varies)	2.5%	24	2.3%	12	2.4%	1	1.5%	1	7.4%	2	2.1%	1	6.7%	2	0.0%	0	0.0%	0	7.3%	1	5.4%	1	2.3%	0
Mean:		*114.43*		*112.46*		*92.85*		*150.70*		*65.77*		*108.65*		*97.66*		*84.66*		*97.41*		*102.21*		*102.74*		*48.40*
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21

Q21 What do you like most about (CENTRE MENTIONED AT Q16)? e.g. Why do you choose to visit there? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Close to home / live here	25.1%	243	21.4%	113	28.1%	15	22.2%	21	35.9%	10	21.6%	8	36.3%	13	28.9%	3	33.2%	7	46.4%	9	3.4%	1	26.7%	4
Attractive environment / nice place	11.3%	109	11.2%	59	7.8%	4	1.4%	1	19.8%	6	12.9%	5	12.6%	5	0.0%	0	4.3%	1	16.6%	3	0.0%	0	16.6%	3
Shops - good range of non-food shops generally	9.6%	92	5.1%	27	19.0%	10	25.4%	23	1.1%	0	22.6%	8	12.0%	4	0.0%	0	3.3%	1	1.7%	0	2.1%	0	0.0%	0
Good cafés / restaurants	6.5%	63	9.1%	48	5.1%	3	1.6%	2	5.3%	2	2.4%	1	8.1%	3	0.0%	0	11.5%	2	0.0%	0	8.2%	2	0.0%	0
Can get everything I need there	6.0%	58	4.4%	23	20.2%	11	5.3%	5	2.3%	1	2.1%	1	3.5%	1	0.0%	0	16.5%	3	6.8%	1	5.4%	1	12.9%	2
Good layout / shops close together / easy to get around	5.7%	55	7.6%	40	8.2%	4	1.1%	1	0.0%	0	8.8%	3	4.6%	2	0.0%	0	1.4%	0	0.0%	0	2.4%	0	0.0%	0
Nice atmosphere / friendly people	4.0%	38	2.4%	13	8.6%	5	0.7%	1	12.9%	4	9.5%	3	7.1%	3	1.7%	0	6.2%	1	19.5%	4	11.5%	2	4.6%	1
Familiar / know where everything is	3.6%	35	3.6%	19	7.5%	4	0.3%	0	11.0%	3	0.0%	0	1.1%	0	3.9%	0	6.6%	1	8.4%	2	6.1%	1	0.0%	0
Easy to get to by car	3.5%	34	3.5%	19	0.0%	0	1.8%	2	1.1%	0	5.9%	2	6.3%	2	3.4%	0	1.4%	0	0.0%	0	13.4%	3	0.0%	0
Shops - good range of independent shops	3.3%	31	2.2%	12	6.3%	3	0.0%	0	3.8%	1	1.0%	0	4.5%	2	0.0%	0	6.6%	1	15.1%	3	1.0%	0	22.0%	4
Quiet / not too busy	3.1%	30	4.3%	23	4.4%	2	0.3%	0	0.0%	0	0.0%	0	1.1%	0	1.7%	0	0.0%	0	0.0%	0	15.7%	3	0.0%	0
Close to friends / relatives	2.8%	27	3.8%	20	0.0%	0	0.0%	0	2.3%	1	0.0%	0	1.1%	0	3.9%	0	0.0%	0	1.7%	0	12.2%	2	10.0%	2
Parking - it's easy to find a space	2.8%	27	1.7%	9	11.2%	6	5.5%	5	0.0%	0	4.5%	2	7.1%	3	1.7%	0	1.4%	0	0.0%	0	0.0%	0	5.3%	1
Good pubs / bars	2.2%	22	3.6%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - good food stores	2.0%	19	0.5%	3	14.0%	7	0.0%	0	2.7%	1	7.2%	3	5.6%	2	5.0%	1	1.4%	0	1.7%	0	0.0%	0	0.0%	0
Shops - good range of clothes shops	1.8%	18	0.6%	3	0.0%	0	15.0%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - good range of affordable shops	1.8%	17	1.9%	10	1.9%	1	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Clean streets / well maintained	1.3%	12	0.9%	5	0.0%	0	1.6%	2	2.3%	1	0.0%	0	0.0%	0	10.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to work / en route to work	1.2%	12	0.7%	3	0.0%	0	4.7%	4	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	1	0.0%	0
Traffic free pedestrian area	1.0%	10	1.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1	0.0%	0
Traditional / quaint	0.9%	8	0.8%	4	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.8%	1	1.4%	0	9.9%	2	0.0%	0	0.0%	0
Shops - good range of 'high street' retailers	0.8%	8	0.6%	3	0.0%	0	0.7%	1	0.0%	0	5.5%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	0	6.1%	1	0.0%	0
Like to visit the cinema / good cinema	0.8%	7	0.9%	5	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good for financial services (e.g. banks / building societies)	0.6%	6	0.9%	5	0.0%	0	0.0%	0	0.0%	0	1.0%	0	1.1%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good for leisure activities	0.5%	5	0.3%	2	1.1%	1	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Has undercover shopping	0.5%	5	0.1%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	28.7%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Feels 'Covid safe'	0.4%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Shops - good opening hours	0.4%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - good range of quality shops	0.4%	4	0.5%	3	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0	0.0%	0
Good range of other services (e.g. library, hairdresser, vets etc.)	0.4%	4	0.3%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - it's free	0.4%	3	0.2%	1	1.4%	1	0.0%	0	0.0%	0	2.4%	1	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by public transport	0.3%	3	0.3%	2	0.5%	0	0.3%	0	2.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good for a day out / visiting as a tourist	0.3%	3	0.1%	1	0.0%	0	0.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - it's cheap	0.2%	2	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good for cultural activities (e.g. museums, galleries, etc)	0.1%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer store	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flat	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Home Bargains store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good street entertainment / lots going on	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good security / feel safe	0.0%	0	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Has a Park & Ride service	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing)	19.1%	184	21.5%	114	13.5%	7	21.1%	20	27.2%	8	35.6%	13	21.6%	8	16.2%	2	4.3%	1	5.6%	1	7.5%	1	24.9%	4
(Don't know)	5.3%	51	4.5%	24	2.9%	2	8.0%	7	1.1%	0	0.0%	0	0.0%	0	0.0%	0	35.3%	7	1.7%	0	6.1%	1	0.0%	0
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21

Meanscore: [Good = 1, Average = 0, Poor = -1]

Q22 Overall, how do you rate (CENTRE MENTIONED AT Q16) on the following aspects? [PR]

Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

Range and choice of shops

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Good	20.3%	196	7.0%	37	43.0%	23	46.6%	43	7.3%	2	13.8%	5	16.7%	6	8.4%	1	43.3%	9	46.1%	9	18.7%	4	65.7%	11
Average	47.1%	454	50.9%	271	43.1%	23	35.8%	33	51.8%	15	55.1%	20	52.2%	19	54.7%	7	39.0%	8	31.8%	6	78.2%	15	16.8%	3
Poor	31.4%	303	40.9%	217	13.9%	7	17.3%	16	40.9%	12	21.6%	8	30.0%	11	36.8%	4	17.7%	4	22.1%	4	3.1%	1	17.5%	3
(Don't know)	1.2%	11	1.2%	6	0.0%	0	0.3%	0	0.0%	0	9.5%	3	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*-0.11*		*-0.34*		*0.29*		*0.29*		*-0.34*		*-0.09*		*-0.13*		*-0.28*		*0.26*		*0.24*		*0.16*		*0.48*
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Quality of shops																								
Good	31.6%	305	19.6%	104	62.3%	33	48.7%	45	42.6%	12	6.1%	2	33.7%	12	10.1%	1	52.4%	10	49.5%	10	24.2%	5	80.2%	14
Average	51.9%	501	60.5%	321	29.6%	16	34.0%	31	44.4%	13	77.1%	28	46.9%	17	52.7%	6	34.7%	7	45.5%	9	68.7%	13	9.9%	2
Poor	14.7%	142	18.1%	96	7.6%	4	16.3%	15	9.5%	3	7.3%	3	17.3%	6	37.2%	4	13.0%	3	1.7%	0	7.1%	1	9.9%	2
(Don't know)	1.8%	17	1.8%	9	0.5%	0	1.1%	1	3.4%	1	9.5%	3	2.1%	1	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0
Mean:		*0.17*		*0.02*		*0.55*		*0.33*		*0.34*		*-0.01*		*0.17*		*-0.27*		*0.39*		*0.50*		*0.17*		*0.70*
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21
Town centre environment																								
Good	34.1%	329	21.8%	116	66.8%	35	42.9%	40	44.8%	13	28.7%	11	20.2%	7	27.3%	3	43.3%	9	72.1%	14	18.1%	4	70.3%	12
Average	43.9%	423	51.7%	275	29.3%	15	37.7%	35	39.0%	11	33.1%	12	45.3%	16	53.3%	6	45.2%	9	27.9%	5	74.8%	15	24.4%	4
Poor	20.4%	196	25.1%	133	4.0%	2	18.3%	17	8.4%	2	27.7%	10	32.4%	12	10.6%	1	11.5%	2	0.0%	0	7.1%	1	5.3%	1
(Don't know)	1.7%	16	1.4%	7	0.0%	0	1.1%	1	7.9%	2	10.5%	4	2.1%	1	8.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.14*		*-0.03*		*0.63*		*0.25*		*0.40*		*0.01*		*-0.13*		*0.18*		*0.32*		*0.72*		*0.11*		*0.65*
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21
Parking availability																								
Good	35.6%	344	28.3%	150	39.4%	21	59.5%	55	20.3%	6	47.7%	18	34.5%	12	66.7%	8	52.4%	10	18.6%	4	28.8%	6	12.3%	2
Average	39.4%	380	47.0%	250	32.3%	17	27.2%	25	32.8%	9	38.6%	14	35.5%	13	24.4%	3	32.8%	7	38.0%	7	52.3%	10	5.3%	1
Poor	17.5%	169	15.6%	83	19.5%	10	8.9%	8	32.2%	9	3.1%	1	28.9%	10	7.3%	1	14.8%	3	34.6%	7	17.9%	3	74.8%	13
(Don't know)	7.4%	72	9.1%	48	8.8%	5	4.4%	4	14.7%	4	10.5%	4	1.1%	0	1.7%	0	0.0%	0	8.8%	2	1.0%	0	7.6%	1
Mean:		*0.20*		*0.14*		*0.22*		*0.53*		*-0.14*		*0.50*		*0.06*		*0.60*		*0.38*		*-0.18*		*0.11*		*-0.68*
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21
Public transport																								
Good	28.5%	275	26.7%	142	40.4%	21	35.5%	33	16.3%	5	24.6%	9	24.8%	9	34.5%	4	26.6%	5	5.1%	1	1.0%	0	28.8%	5
Average	30.0%	289	34.0%	180	23.4%	12	24.5%	23	12.9%	4	27.0%	10	23.9%	9	10.6%	1	29.5%	6	23.3%	4	60.8%	12	28.5%	5
Poor	16.2%	156	17.1%	91	5.8%	3	12.8%	12	37.0%	11	13.9%	5	17.2%	6	17.7%	2	22.9%	5	37.4%	7	16.0%	3	5.3%	1
(Don't know)	25.3%	244	22.2%	118	30.4%	16	27.3%	25	33.8%	10	34.4%	13	34.2%	12	37.2%	4	21.0%	4	34.2%	7	22.1%	4	37.4%	6
Mean:		*0.17*		*0.12*		*0.50*		*0.31*		*-0.31*		*0.16*		*0.12*		*0.27*		*0.05*		*-0.49*		*-0.19*		*0.37*
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21

Q23 What improvements to (CENTRE MENTIONED AT Q16) would make you spend more time there or visit it more often? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Shops - more / better non-food shops generally	18.5%	178	22.4%	119	10.5%	5	6.2%	6	21.5%	6	17.3%	6	24.3%	9	43.3%	5	10.1%	2	0.0%	0	8.2%	2	5.3%	1
Shops - more 'high street' retailers	12.7%	122	17.4%	92	3.5%	2	6.6%	6	7.1%	2	16.7%	6	4.9%	2	31.0%	4	0.0%	0	3.9%	1	0.0%	0	0.0%	0
Shops - more independent / specialist shops	9.9%	96	11.9%	63	6.0%	3	8.9%	8	10.6%	3	4.2%	2	10.6%	4	20.3%	2	0.0%	0	12.7%	2	0.0%	0	0.0%	0
Less empty shops	7.8%	75	10.9%	58	4.0%	2	5.0%	5	2.7%	1	3.1%	1	11.3%	4	0.0%	0	9.5%	2	0.0%	0	0.0%	0	0.0%	0
Shops - more clothes shops	7.2%	69	10.0%	53	4.7%	2	0.8%	1	2.3%	1	6.1%	2	8.8%	3	31.6%	4	7.6%	2	0.0%	0	0.0%	0	0.0%	0
Parking - more spaces / easier to park	6.3%	60	4.3%	23	9.4%	5	0.8%	1	2.3%	1	9.8%	4	11.9%	4	0.0%	0	1.4%	0	26.5%	5	15.6%	3	46.1%	8
Better public transport	5.5%	54	6.5%	34	5.9%	3	6.2%	6	6.7%	2	3.1%	1	0.0%	0	12.2%	1	1.4%	0	7.3%	1	2.4%	0	0.0%	0
Shops - more / better quality shops	5.4%	52	8.4%	45	0.0%	0	1.6%	2	1.1%	0	4.2%	2	2.5%	1	8.9%	1	2.9%	1	1.7%	0	0.0%	0	0.0%	0
Shops - more / better food stores	3.5%	33	1.1%	6	4.5%	2	0.0%	0	18.9%	5	0.0%	0	6.7%	2	20.9%	3	0.0%	0	11.6%	2	12.6%	2	50.4%	8
Parking - free parking	3.3%	32	4.6%	24	1.4%	1	1.8%	2	0.0%	0	1.0%	0	9.8%	4	0.0%	0	1.4%	0	0.0%	0	0.0%	0	5.3%	1
Parking - lower parking prices	3.1%	30	3.4%	18	2.9%	2	7.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	2
Better nightlife	3.0%	29	5.0%	26	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1	0.0%	0
Cleaner streets / better maintained	3.0%	29	3.2%	17	1.1%	1	2.5%	2	0.0%	0	6.5%	2	9.1%	3	0.0%	0	0.0%	0	0.0%	0	7.3%	1	0.0%	0
More / better leisure / entertainment / cultural facilities	2.8%	27	3.6%	19	1.3%	1	3.9%	4	6.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1	2.3%	0
Update / refurbish it	2.4%	23	2.5%	13	0.5%	0	0.8%	1	1.1%	0	7.6%	3	13.6%	5	1.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better pubs / bars	2.2%	21	3.4%	18	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	1	0.0%	0
More / better cafes / restaurants	2.2%	21	2.8%	15	0.0%	0	5.5%	5	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - lower prices in shops	2.1%	20	2.7%	14	0.0%	0	3.6%	3	2.3%	1	0.0%	0	0.0%	0	0.0%	0	8.4%	2	0.0%	0	0.0%	0	0.0%	0
Less charity shops	2.1%	20	3.3%	17	3.4%	2	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	1	0.0%	0	0.0%	0	0.0%	0
More / better events	1.7%	16	2.4%	13	0.0%	0	2.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	1	0.0%	0
More / better public toilets	1.2%	12	1.8%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1	1.7%	0	6.1%	1	0.0%	0
Less hairdressers / barbers	1.0%	9	1.7%	9	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better financial services (e.g. banks / building societies)	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	0	8.1%	3	0.0%	0	0.0%	0	0.0%	0	21.9%	4	0.0%	0
Better security / safety / better policing	0.6%	6	0.7%	3	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.6%	6	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	3.9%	1	0.0%	0	0.0%	0
More / better seating areas	0.6%	6	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	2
Better layout / shops closer together	0.6%	5	1.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More pedestrianisation / better pedestrian links	0.5%	5	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
More / better range of other services (e.g. library, hairdresser, vets etc.)	0.5%	5	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	2	0.0%	0	0.0%	0	0.0%	0	6.1%	1	5.3%	1
Less traffic congestion / better access	0.5%	5	0.3%	1	0.5%	0	0.0%	0	2.3%	1	0.0%	0	2.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nicer atmosphere / friendlier people	0.5%	5	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Introduce a tram system	0.5%	4	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More undercover shopping	0.4%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better promotion of what's there (e.g. posters/website/social media/email)	0.4%	4	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better lighting	0.4%	4	0.7%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More takeaways	0.3%	3	0.0%	0	3.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.3%	1	0.0%	0
Discount food retailer	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.0%	2
Longer opening hours for cafes	0.2%	2	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less takeaways	0.2%	2	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More attractive / nicer environment	0.1%	1	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less phone shops	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less homelessness	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Open the canals	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More youth hostels	0.1%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less cafes / restaurants	0.1%	1	0.1%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better internet coverage	0.0%	0	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More support for businesses	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less tourist shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Keep public toilets open throughout the year	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking meters to accept cash	0.0%	0	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better street markets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic wardens	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
To offer a Park & Ride service	0.0%	0	0.0%	0	0.0%	0	0.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less betting shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More electric car charging facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(None)	21.2%	205	9.1%	48	52.6%	28	28.0%	26	47.8%	14	42.4%	16	24.0%	9	15.7%	2	31.3%	6	53.2%	10	14.7%	3	9.2%	2
(Don’t know)	9.3%	90	9.1%	48	6.1%	3	18.8%	17	2.3%	1	0.0%	0	7.7%	3	1.7%	0	28.3%	6	0.0%	0	1.0%	0	2.3%	0
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21

Meanscore: [Number of visits per week]

Q24 How often do you visit (CENTRE MENTIONED AT Q16) in the evening i.e. after 6pm, on average?
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Daily	5.9%	57	8.9%	47	0.0%	0	8.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
4-6 times a week	2.1%	21	2.5%	13	0.0%	0	4.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.5%	4	0.0%	0	0.0%	0	0.0%	0
2-3 times a week	10.6%	103	11.2%	59	6.7%	4	12.7%	12	11.0%	3	0.0%	0	4.0%	1	0.0%	0	6.6%	1	1.7%	0	71.3%	14	0.0%	0
Once a week	4.8%	46	3.3%	18	2.5%	1	11.7%	11	1.9%	1	6.1%	2	5.6%	2	0.0%	0	28.3%	6	10.5%	2	0.0%	0	5.3%	1
2-3 times a month	4.6%	44	5.5%	29	3.2%	2	1.8%	2	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	2	0.0%	0	6.9%	1
Once a month	5.5%	53	4.1%	22	3.5%	2	4.2%	4	6.7%	2	0.0%	0	12.4%	4	9.9%	1	8.9%	2	7.3%	1	0.0%	0	31.6%	5
Less often	21.0%	202	24.2%	128	13.1%	7	19.9%	18	7.3%	2	27.1%	10	18.3%	7	24.3%	3	8.1%	2	5.6%	1	13.6%	3	2.3%	0
Never	44.4%	428	39.3%	209	69.7%	37	35.4%	33	71.3%	20	65.8%	24	59.8%	22	65.8%	8	29.6%	6	62.7%	12	15.1%	3	49.4%	8
(Don't know)	1.1%	11	1.1%	6	1.4%	1	1.6%	2	0.0%	0	1.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	1
Mean:		*0.90*		*1.13*		*0.23*		*1.30*		*0.33*		*0.09*		*0.21*		*0.05*		*1.41*		*0.22*		*1.80*		*0.19*
Weighted base:		965		531		52		92		28		37		36		12		20		19		20		17
Sample:		948		425		76		63		50		46		44		34		31		30		22		21

Q25 What do visit (CENTRE MENTIONED AT Q16) for in the evening? [MR]

Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16 or 'Never' at Q24

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Attending events	2.4%	13	3.7%	12	3.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cafes / restaurants	36.9%	202	41.9%	135	52.9%	8	16.7%	10	40.5%	3	38.8%	5	47.4%	7	28.8%	1	18.4%	3	37.2%	3	22.0%	4	50.8%	4
Cinema	12.0%	65	13.4%	43	0.0%	0	23.1%	14	0.0%	0	17.2%	2	0.0%	0	0.0%	0	0.0%	0	62.8%	5	0.0%	0	0.0%	0
Gym / sports hall / swimming / ice sports	4.0%	22	3.9%	12	24.0%	4	1.1%	1	12.0%	1	0.0%	0	9.9%	1	0.0%	0	4.7%	1	0.0%	0	0.0%	0	0.0%	0
Library	0.8%	5	0.0%	0	0.0%	0	7.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	0	0.0%	0	0.0%	0
Live music venues / gigs	6.1%	33	7.3%	23	4.6%	1	2.8%	2	0.0%	0	0.0%	0	2.7%	0	4.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Meeting family / friends	10.4%	57	10.8%	35	1.8%	0	6.8%	4	0.0%	0	0.0%	0	6.2%	1	4.9%	0	4.7%	1	15.0%	1	21.5%	4	4.5%	0
Nightclub	1.1%	6	1.3%	4	0.0%	0	2.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Place of worship	0.3%	2	0.2%	1	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	0	0.0%	0	0.0%	0
Pubs / bars	22.6%	123	24.8%	80	20.7%	3	3.9%	2	9.3%	1	41.0%	5	13.9%	2	0.0%	0	0.0%	0	34.1%	2	20.8%	3	38.7%	3
Takeaways / fast food	5.8%	32	2.3%	8	6.0%	1	8.6%	5	13.3%	1	0.0%	0	22.7%	3	0.0%	0	0.0%	0	4.5%	0	42.9%	7	10.5%	1
Theatre / shows	12.7%	69	15.1%	49	6.0%	1	12.7%	8	8.0%	1	0.0%	0	0.0%	0	56.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
To work	3.4%	18	3.3%	11	0.0%	0	6.8%	4	0.0%	0	0.0%	0	0.0%	0	4.9%	0	11.9%	2	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Food shopping	2.3%	13	0.6%	2	1.8%	0	2.8%	2	13.3%	1	0.0%	0	0.0%	0	0.0%	0	28.3%	4	0.0%	0	0.0%	0	0.0%	0
Gardens / green spaces / parks	1.3%	7	1.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Go for a walk	2.3%	12	2.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	1	0.0%	0	20.1%	3	0.0%	0	0.0%	0	23.7%	2
Health appointment	0.1%	0	0.0%	0	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Non-food shopping	3.1%	17	1.3%	4	4.6%	1	8.5%	5	20.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Services such as post office, laundrette, vets, etc.	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Visit place of education	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	6.6%	36	8.3%	27	0.0%	0	5.3%	3	0.0%	0	3.1%	0	0.0%	0	0.0%	0	11.9%	2	0.0%	0	0.0%	0	4.5%	0
Weighted base:		547		322		16		60		8		13		15		4		14		7		17		9
Sample:		396		191		28		31		14		11		13		7		13		11		15		11

Q26 What improvements or attractions would make you visit (CENTRE MENTIONED AT Q16) more often in the evening? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16 or 'Never' at Q24

	Total		Perth City Centre		Blairgowrie Town Centre		Dundee City Centre		Pitlochry Town Centre		Stirling City Centre		Crieff Town Centre		Glenrothes Town Centre		Forfar Town Centre		Aberfeldy Town Centre		Kinross Town Centre		Auchterarder Town Centre	
Better range of cafes / restaurants / pubs	13.0%	71	12.3%	40	1.8%	0	8.6%	5	9.3%	1	14.2%	2	26.2%	4	0.0%	0	9.4%	1	23.7%	2	0.0%	0	23.7%	2
More live music / concerts	3.5%	19	5.5%	18	1.8%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More outdoor entertainment / events	3.1%	17	3.2%	10	0.0%	0	5.6%	3	0.0%	0	0.0%	0	0.0%	0	28.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A cinema	2.9%	16	2.0%	6	0.0%	0	6.2%	4	4.0%	0	0.0%	0	12.3%	2	0.0%	0	14.3%	2	0.0%	0	7.2%	1	0.0%	0
Public transport running later / more services	2.7%	15	2.8%	9	4.2%	1	2.5%	2	4.0%	0	0.0%	0	0.0%	0	4.9%	0	0.0%	0	0.0%	0	14.4%	2	0.0%	0
Bowling alley	2.7%	15	2.9%	9	0.0%	0	9.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More attractive environment	2.5%	14	3.2%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops / venues open later	2.3%	13	2.5%	8	0.0%	0	0.0%	0	0.0%	0	17.9%	2	13.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pubs open later	1.6%	8	2.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better cinema experience	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	47.4%	8	0.0%	0
Improved range of shops	1.4%	8	1.3%	4	0.0%	0	5.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More for families to do	1.2%	6	1.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.0%	1
More for families to do	1.2%	6	1.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.0%	1
Better street lighting	1.1%	6	1.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A theatre	1.0%	6	1.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved safety and security	1.0%	5	0.5%	1	0.0%	0	0.0%	0	0.0%	0	16.0%	2	13.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - lower parking prices	0.9%	5	1.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better theatre experience	0.9%	5	1.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Snooker / pool clubs	0.8%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - more secure / safe	0.8%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crazy golf	0.8%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ghost / history walks	0.8%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Light art installations	0.8%	4	1.3%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lower prices for food/drink in venues (including pubs/restaurants)	0.6%	3	0.5%	1	0.0%	0	0.0%	0	9.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - more spaces / easier to park	0.5%	3	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	0
More / better theatres	0.3%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better cinemas	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.2%	1	0.0%	0
Parking - free parking	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleaner / better maintained streets	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cultural venues open at night e.g. museums / galleries	0.1%	0	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing / very little)	42.3%	232	41.6%	134	86.8%	14	34.3%	20	82.7%	7	44.9%	6	33.7%	5	66.2%	3	24.1%	3	71.8%	5	15.3%	3	52.3%	4
(Don't know)	15.8%	86	12.7%	41	5.4%	1	28.0%	17	0.0%	0	7.1%	1	13.9%	2	0.0%	0	52.1%	7	4.5%	0	8.6%	1	4.5%	0
Weighted base:		547		322		16		60		8		13		15		4		14		7		17		9
Sample:		396		191		28		31		14		11		13		7		13		11		15		11

Q16 Now thinking about ALL centres, including the ones previously mentioned - Which centre does your household visit most often for shopping and services?

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Aberfeldy Town Centre	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abernethy Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Almondbank Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alyth Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	2	0.0%	0	0.0%	0	0.0%	0
Auchterarder Town Centre	1.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bankfoot Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Birnam Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Blairgowrie Town Centre	5.2%	52	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bridge of Earn Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Comrie Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Coupar Angus Town Centre	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cowdenbeath Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crieff Town Centre	3.6%	36	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cupar Town Centre	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	3	0.0%	0
Dundee City Centre	9.1%	92	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunfermline Town Centre	1.1%	11	100.0%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunkeld Town Centre	2.1%	21	0.0%	0	100.0%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Edinburgh City Centre	1.4%	14	0.0%	0	0.0%	0	100.0%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Errol Village Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glasgow City Centre	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	10	0.0%	0	0.0%	0
Gleneagles Local Centre, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Glenrothes Town Centre	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Inchture Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Invergowrie Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Killin Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kinross Town Centre	1.9%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirkcaldy Town Centre	0.4%	4	0.0%	0	0.0%	0	0.0%	0	100.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Luncarty Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Methven Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Milnathort Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Murthly Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Perth City Centre	52.4%	531	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pitlochry Town Centre	2.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ratray Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Scone Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stanley Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stirling City Centre	3.6%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Abroath Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Alloa Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ballinluig Village Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Callander Town Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunblane Town Centre	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Fife Central Retail Park,	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Chapel Park, Kirkcaldy, KY2 6QL																						
Forfar Town Centre	2.0%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kingsway West Retail Park, Clepington Road, Dundee, DD3 8RX	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Kirriemuir Town Centre	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Designer Outlet, Almondvale Avenue, Livingston, EH54 6QX	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Livingston Town Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Springkerse Retail Park, Stirling, FK7 7TL	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Catherines Retail Park, Perth, PH1 5XA	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	6
(Don't know)	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't visit ANY centres for shopping or services)	3.3%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1013		11		21		14		4		7		6		2		10		3		6
Sample:		1013		20		16		11		9		9		7		5		5		4		4

Meanscore: [More often = 1, About the same = 0, Less often = -1]

Q17 Compared to before the Covid-19 pandemic, how frequently do you visit (CENTRE MENTIONED AT Q16) now? [PR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
More often	7.7%	75	14.3%	2	3.6%	1	38.1%	5	12.2%	0	33.2%	2	4.8%	0	47.5%	1	17.1%	2	5.9%	0	0.0%	0
About the same	55.9%	540	43.9%	5	67.3%	14	46.2%	7	82.5%	3	66.8%	5	90.3%	5	52.5%	1	55.8%	5	94.1%	3	13.5%	1
Less often	35.4%	341	41.9%	5	29.1%	6	15.7%	2	5.3%	0	0.0%	0	4.8%	0	0.0%	0	27.0%	3	0.0%	0	86.5%	5
(Don't know)	1.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*-0.28*		*-0.28*		*-0.26*		*0.22*		*0.07*		*0.33*		*0.00*		*0.48*		*-0.10*		*0.06*		*-0.87*
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4

Q18 How do you normally travel to (CENTRE MENTION AT Q16)?
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Car / van (as driver)	64.9%	626	90.3%	10	78.4%	16	27.8%	4	77.3%	3	61.5%	4	63.7%	4	68.3%	1	78.9%	8	100.0%	3	26.4%	1
Car / van (as passenger)	9.4%	91	7.8%	1	1.6%	0	3.3%	0	17.5%	1	0.0%	0	12.2%	1	0.0%	0	0.0%	0	0.0%	0	5.8%	0
Bus, minibus or coach	10.2%	99	1.8%	0	0.0%	0	24.1%	3	5.3%	0	0.0%	0	0.0%	0	15.8%	0	3.9%	0	0.0%	0	0.0%	0
Motorcycle, scooter or moped	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	12.1%	117	0.0%	0	20.0%	4	0.0%	0	0.0%	0	38.5%	3	24.1%	1	15.8%	0	0.0%	0	0.0%	0	67.7%	4
Train	1.2%	12	0.0%	0	0.0%	0	44.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.1%	2	0.0%	0	0.0%	0
Taxi	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / disability vehicle	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don’t know / can't remember)	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4

Q19 What activities do you do when you visit (CENTRE MENTIONED AT Q16)? [MR]

Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Food shopping	50.6%	488	38.2%	4	54.1%	11	0.0%	0	22.7%	1	28.3%	2	78.2%	5	84.2%	2	0.0%	0	68.9%	2	0.0%	0
Non-food shopping	53.4%	515	54.6%	6	44.3%	9	49.8%	7	89.5%	3	66.3%	5	9.6%	1	68.3%	1	82.9%	8	49.2%	2	32.3%	2
Services - Financial e.g. bank, building society, cash machine	8.3%	80	1.8%	0	1.6%	0	0.0%	0	12.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Services - Health e.g. doctor, dentist, hospital, opticians	8.4%	82	0.0%	0	14.8%	3	0.0%	0	0.0%	0	27.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Services - Other e.g. laundrette, hairdresser, vets, recycling	6.3%	60	0.0%	0	19.7%	4	0.0%	0	5.3%	0	33.2%	2	4.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Accessing transport (e.g. using bus / tube / train station)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Buying fuel (visiting petrol station)	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cafes / coffee shops	20.5%	198	16.3%	2	37.1%	8	0.0%	0	12.2%	0	61.0%	4	4.8%	0	31.6%	1	3.9%	0	55.1%	2	0.0%	0
Cinema	4.0%	38	10.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Family entertainment venue (e.g. bowling alley, ice rink, etc.).	0.6%	6	0.0%	0	0.0%	0	0.0%	0	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gym / leisure centre / swimming pool	2.7%	26	4.2%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Library	1.1%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Live music venues / gigs	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Meeting family / friends in centre	4.6%	44	18.5%	2	1.6%	0	0.0%	0	0.0%	0	5.3%	0	12.2%	1	31.6%	1	0.0%	0	0.0%	0	0.0%	0
Museums / galleries	0.6%	6	0.0%	0	0.0%	0	7.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Outdoor sports venue (e.g. tennis / basketball court / football / cricket pitch)	1.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	0	0.0%	0	0.0%	0	0.0%	0	31.1%	1	13.5%	1
Parks / green spaces	0.8%	8	9.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Place of worship	1.0%	9	0.0%	0	1.6%	0	0.0%	0	0.0%	0	27.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Post Office	0.9%	9	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.7%	1	0.0%	0	0.0%	0	0.0%	0
Pubs / bars	2.6%	25	9.5%	1	11.7%	2	0.0%	0	12.2%	0	27.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Restaurants	13.4%	129	13.7%	2	9.7%	2	62.8%	9	0.0%	0	5.3%	0	0.0%	0	15.8%	0	73.0%	7	0.0%	0	13.5%	1
School / college / university	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Takeaways / fast food	1.5%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Theatres / shows	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.1%	2	0.0%	0	0.0%	0
Walk / walk the dog	4.5%	43	4.2%	0	30.8%	6	11.7%	2	0.0%	0	33.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Window shopping / browsing	10.6%	103	1.8%	0	19.7%	4	11.7%	2	10.5%	0	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	67.7%	4
Work	5.5%	53	22.3%	2	0.0%	0	0.0%	0	0.0%	0	12.3%	1	4.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Play bingo	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
(Don't know / can't remember)	2.6%	25	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	4.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4

Meanscore: [Time in minutes]

Q20 How long do you normally spend in (CENTRE MENTIONED AT Q16) when visiting?
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Less than 30 mins	6.9%	66	0.0%	0	28.4%	6	0.0%	0	0.0%	0	33.2%	2	68.5%	4	68.3%	1	0.0%	0	0.0%	0	0.0%	0
30 - 59 mins	14.2%	137	6.0%	1	0.0%	0	0.0%	0	22.7%	1	28.3%	2	14.5%	1	0.0%	0	0.0%	0	19.7%	1	0.0%	0
1 hour - 1 hour 59 mins	39.9%	385	25.8%	3	18.0%	4	0.0%	0	34.9%	1	33.2%	2	0.0%	0	0.0%	0	0.0%	0	49.2%	2	100.0%	6
2 hour - 2 hours 59 mins	24.7%	239	45.9%	5	50.5%	11	8.8%	1	42.4%	2	0.0%	0	12.2%	1	15.8%	0	0.0%	0	31.1%	1	0.0%	0
3 hour - 3 hours 59 mins	4.7%	45	4.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
4 hours or more	7.1%	69	18.1%	2	1.6%	0	91.2%	13	0.0%	0	5.3%	0	0.0%	0	0.0%	0	100.0%	10	0.0%	0	0.0%	0
(Don't know / varies)	2.5%	24	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	0	15.8%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*114.43*		*157.90*		*102.46*		*286.80*		*105.19*		*63.57*		*36.86*		*40.40*		*300.00*		*99.77*		*90.00*
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4

Q21 What do you like most about (CENTRE MENTIONED AT Q16)? e.g. Why do you choose to visit there? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Close to home / live here	25.1%	243	17.9%	2	44.4%	9	3.3%	0	79.0%	3	73.4%	5	73.3%	4	52.5%	1	23.1%	2	0.0%	0	67.7%	4
Attractive environment / nice place	11.3%	109	4.2%	0	57.2%	12	33.8%	5	0.0%	0	38.5%	3	4.8%	0	31.6%	1	17.1%	2	0.0%	0	0.0%	0
Shops - good range of non-food shops generally	9.6%	92	3.6%	0	3.1%	1	61.5%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	59.8%	6	13.8%	0	13.0%	1
Good cafés / restaurants	6.5%	63	6.0%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	0	0.0%	0	0.0%	0	3.9%	0	5.9%	0	0.0%	0
Can get everything I need there	6.0%	58	0.0%	0	24.4%	5	5.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good layout / shops close together / easy to get around	5.7%	55	1.8%	0	0.0%	0	10.7%	2	0.0%	0	5.3%	0	4.8%	0	0.0%	0	17.1%	2	0.0%	0	0.0%	0
Nice atmosphere / friendly people	4.0%	38	1.8%	0	0.0%	0	2.7%	0	0.0%	0	5.3%	0	0.0%	0	31.6%	1	0.0%	0	0.0%	0	0.0%	0
Familiar / know where everything is	3.6%	35	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	0	4.8%	0	31.6%	1	0.0%	0	31.1%	1	0.0%	0
Easy to get to by car	3.5%	34	0.0%	0	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	36.7%	1	38.7%	4	0.0%	0	0.0%	0
Shops - good range of independent shops	3.3%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.3%	1	0.0%	0	0.0%	0	17.1%	2	49.2%	2	0.0%	0
Quiet / not too busy	3.1%	30	0.0%	0	3.6%	1	0.0%	0	0.0%	0	5.3%	0	0.0%	0	15.8%	0	0.0%	0	0.0%	0	0.0%	0
Close to friends / relatives	2.8%	27	9.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - it's easy to find a space	2.8%	27	0.0%	0	0.0%	0	0.0%	0	12.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good pubs / bars	2.2%	22	0.0%	0	0.0%	0	11.7%	2	0.0%	0	0.0%	0	0.0%	0	36.7%	1	0.0%	0	0.0%	0	0.0%	0
Shops - good food stores	2.0%	19	10.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	1	36.7%	1	0.0%	0	5.9%	0	0.0%	0
Shops - good range of clothes shops	1.8%	18	4.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - good range of affordable shops	1.8%	17	10.6%	1	0.0%	0	6.5%	1	0.0%	0	0.0%	0	0.0%	0	15.8%	0	0.0%	0	0.0%	0	0.0%	0
Clean streets / well maintained	1.3%	12	0.0%	0	18.1%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Close to work / en route to work	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	49.2%	2	0.0%	0
Traffic free pedestrian area	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Traditional / quaint	0.9%	8	4.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - good range of 'high street' retailers	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Like to visit the cinema / good cinema	0.8%	7	10.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good for financial services (e.g. banks / building societies)	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good for leisure activities	0.5%	5	6.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Has undercover shopping	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Feels 'Covid safe'	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Shops - good opening hours	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - good range of quality shops	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good range of other services (e.g. library, hairdresser, vets etc.)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	0	0.0%	0	36.7%	1	0.0%	0	0.0%	0	0.0%	0
Parking - it's free	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Easy to get to by public transport	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good for a day out / visiting as a tourist	0.3%	3	0.0%	0	0.0%	0	11.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - it's cheap	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	49.2%	2	0.0%	0
Good for cultural activities (e.g. museums, galleries, etc)	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer store	0.1%	1	1.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Flat	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.5%	1
Home Bargains store	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.5%	1
Good street entertainment / lots going on	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Good security / feel safe	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Has a Park & Ride service	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing)	19.1%	184	11.5%	1	1.6%	0	0.0%	0	21.1%	1	0.0%	0	4.8%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	0
(Don't know)	5.3%	51	19.9%	2	0.0%	0	26.4%	4	0.0%	0	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4

Meanscore: [Good = 1, Average = 0, Poor = -1]

Q22 Overall, how do you rate (CENTRE MENTIONED AT Q16) on the following aspects? [PR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16
Range and choice of shops

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Good	20.3%	196	21.7%	2	55.7%	12	100.0%	14	0.0%	0	5.3%	0	12.2%	1	84.2%	2	96.1%	9	55.1%	2	26.4%	1
Average	47.1%	454	62.6%	7	18.3%	4	0.0%	0	54.5%	2	73.4%	5	73.3%	4	15.8%	0	3.9%	0	44.9%	2	73.5%	4
Poor	31.4%	303	15.7%	2	26.0%	5	0.0%	0	45.4%	2	21.3%	2	14.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	1.2%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*-0.11*		*0.06*		*0.30*		*1.00*		*-0.46*		*-0.16*		*-0.02*		*0.84*		*0.96*		*0.55*		*0.27*
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Quality of shops																						
Good	31.6%	305	31.2%	3	38.2%	8	94.9%	14	0.0%	0	61.5%	4	68.5%	4	84.2%	2	96.1%	9	55.1%	2	100.0%	6
Average	51.9%	501	57.3%	6	60.2%	13	5.1%	1	47.6%	2	38.5%	3	26.7%	2	15.8%	0	3.9%	0	44.9%	2	0.0%	0
Poor	14.7%	142	11.5%	1	1.6%	0	0.0%	0	52.4%	2	0.0%	0	4.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	1.8%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.17*		*0.20*		*0.37*		*0.95*		*-0.52*		*0.62*		*0.64*		*0.84*		*0.96*		*0.55*		*1.00*
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4
Town centre environment																						
Good	34.1%	329	47.5%	5	95.3%	20	94.0%	13	0.0%	0	50.8%	4	9.6%	1	100.0%	2	96.1%	9	55.1%	2	26.4%	1
Average	43.9%	423	45.2%	5	3.1%	1	3.3%	0	72.0%	3	49.2%	4	17.0%	1	0.0%	0	0.0%	0	44.9%	2	0.0%	0
Poor	20.4%	196	7.3%	1	1.6%	0	2.7%	0	22.7%	1	0.0%	0	73.3%	4	0.0%	0	3.9%	0	0.0%	0	73.5%	4
(Don't know)	1.7%	16	0.0%	0	0.0%	0	0.0%	0	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.14*		*0.40*		*0.94*		*0.91*		*-0.24*		*0.51*		*-0.64*		*1.00*		*0.92*		*0.55*		*-0.47*
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4
Parking availability																						
Good	35.6%	344	69.0%	8	44.1%	9	55.5%	8	77.3%	3	33.2%	2	75.9%	5	31.6%	1	82.9%	8	68.9%	2	26.4%	1
Average	39.4%	380	27.3%	3	23.3%	5	16.8%	2	17.5%	1	45.5%	3	4.8%	0	36.7%	1	17.1%	2	31.1%	1	0.0%	0
Poor	17.5%	169	3.6%	0	32.7%	7	12.1%	2	0.0%	0	21.3%	2	14.5%	1	15.8%	0	0.0%	0	0.0%	0	73.5%	4
(Don't know)	7.4%	72	0.0%	0	0.0%	0	15.7%	2	5.3%	0	0.0%	0	4.8%	0	15.8%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.20*		*0.65*		*0.11*		*0.52*		*0.82*		*0.12*		*0.65*		*0.19*		*0.83*		*0.69*		*-0.47*
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4
Public transport																						
Good	28.5%	275	44.0%	5	6.7%	1	91.2%	13	10.5%	0	66.3%	5	19.3%	1	84.2%	2	82.9%	8	49.2%	2	0.0%	0
Average	30.0%	289	30.8%	3	55.3%	12	7.4%	1	36.6%	1	0.0%	0	12.2%	1	0.0%	0	17.1%	2	0.0%	0	0.0%	0
Poor	16.2%	156	0.0%	0	8.3%	2	0.0%	0	0.0%	0	17.7%	1	0.0%	0	15.8%	0	0.0%	0	44.9%	2	67.7%	4
(Don't know)	25.3%	244	25.2%	3	29.7%	6	1.4%	0	52.9%	2	16.0%	1	68.5%	4	0.0%	0	0.0%	0	5.9%	0	32.3%	2
Mean:		*0.17*		*0.59*		*-0.02*		*0.93*		*0.22*		*0.58*		*0.61*		*0.68*		*0.83*		*0.05*		*-1.00*
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4

Q23 What improvements to (CENTRE MENTIONED AT Q16) would make you spend more time there or visit it more often? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Shops - more / better non-food shops generally	18.5%	178	25.8%	3	24.4%	5	0.0%	0	22.7%	1	27.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	67.7%	4
Shops - more 'high street' retailers	12.7%	122	17.3%	2	0.0%	0	3.3%	0	22.7%	1	33.2%	2	0.0%	0	0.0%	0	0.0%	0	55.1%	2	0.0%	0
Shops - more independent / specialist shops	9.9%	96	14.9%	2	1.6%	0	6.0%	1	0.0%	0	10.7%	1	4.8%	0	0.0%	0	0.0%	0	0.0%	0	67.7%	4
Less empty shops	7.8%	75	1.8%	0	0.0%	0	2.7%	0	0.0%	0	27.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - more clothes shops	7.2%	69	9.5%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	0	4.8%	0	0.0%	0	0.0%	0	5.9%	0	0.0%	0
Parking - more spaces / easier to park	6.3%	60	1.8%	0	8.3%	2	7.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	0
Better public transport	5.5%	54	0.0%	0	3.1%	1	7.4%	1	12.2%	0	17.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - more / better quality shops	5.4%	52	3.6%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - more / better food stores	3.5%	33	1.8%	0	3.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - free parking	3.3%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - lower parking prices	3.1%	30	0.0%	0	3.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better nightlife	3.0%	29	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleaner streets / better maintained	3.0%	29	3.6%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	0	4.8%	0	0.0%	0	3.9%	0	0.0%	0	0.0%	0
More / better leisure / entertainment / cultural facilities	2.8%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Update / refurbish it	2.4%	23	0.0%	0	0.0%	0	0.0%	0	5.3%	0	5.3%	0	4.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better pubs / bars	2.2%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better cafes / restaurants	2.2%	21	0.0%	0	0.0%	0	2.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops - lower prices in shops	2.1%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less charity shops	2.1%	20	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better events	1.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better public toilets	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less hairdressers / barbers	1.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better financial services (e.g. banks / building societies)	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better security / safety / better policing	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better seating areas	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better layout / shops closer together	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More pedestrianisation / better pedestrian links	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
More / better range of other services (e.g. library, hairdresser, vets etc.)	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic congestion / better access	0.5%	5	10.6%	1	1.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nicer atmosphere / friendlier people	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Introduce a tram system	0.5%	4	0.0%	0	0.0%	0	26.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More undercover shopping	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better promotion of what's there (e.g. posters/website/social media/email)	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better lighting	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More takeaways	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Discount food retailer	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Longer opening hours for cafes	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less takeaways	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More attractive / nicer environment	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less phone shops	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less homelessness	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Open the canals	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More youth hostels	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less cafes / restaurants	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better internet coverage	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More support for businesses	0.0%	0	4.2%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less tourist shops	0.0%	0	0.0%	0	0.0%	0	3.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Keep public toilets open throughout the year	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking meters to accept cash	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better street markets	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less traffic wardens	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
To offer a Park & Ride service	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less betting shops	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More electric car charging facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(None)	21.2%	205	10.2%	1	54.1%	11	33.9%	5	34.9%	1	5.3%	0	80.7%	5	84.2%	2	96.1%	9	44.9%	2	13.0%	1
(Don’t know)	9.3%	90	19.9%	2	8.0%	2	26.4%	4	37.1%	1	0.0%	0	9.6%	1	15.8%	0	0.0%	0	0.0%	0	13.5%	1
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4

Meanscore: [Number of visits per week]

Q24 How often do you visit (CENTRE MENTIONED AT Q16) in the evening i.e. after 6pm, on average?
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Daily	5.9%	57	18.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
4-6 times a week	2.1%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 times a week	10.6%	103	10.6%	1	0.0%	0	0.0%	0	5.3%	0	27.8%	2	0.0%	0	36.7%	1	0.0%	0	31.1%	1	0.0%	0
Once a week	4.8%	46	16.7%	2	3.6%	1	0.0%	0	0.0%	0	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
2-3 times a month	4.6%	44	1.8%	0	0.0%	0	11.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.1%	2	0.0%	0	67.7%	4
Once a month	5.5%	53	0.0%	0	11.2%	2	26.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	17.1%	2	0.0%	0	0.0%	0
Less often	21.0%	202	31.8%	4	24.8%	5	47.1%	7	5.3%	0	12.3%	1	0.0%	0	15.8%	0	42.6%	4	0.0%	0	0.0%	0
Never	44.4%	428	21.0%	2	52.3%	11	14.8%	2	89.5%	3	54.5%	4	100.0%	6	47.5%	1	23.1%	2	68.9%	2	32.3%	2
(Don't know)	1.1%	11	0.0%	0	8.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*0.90*		*1.74*		*0.10*		*0.17*		*0.14*		*0.76*		*0.00*		*0.93*		*0.16*		*0.78*		*0.27*
Weighted base:		965		11		21		14		4		7		6		2		10		3		6
Sample:		948		20		16		11		9		9		7		5		5		4		4

Q25 What do visit (CENTRE MENTIONED AT Q16) for in the evening? [MR]

Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16 or 'Never' at Q24

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Attending events	2.4%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	30.1%	0	0.0%	0	0.0%	0	0.0%	0
Bingo	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cafes / restaurants	36.9%	202	29.6%	3	45.2%	5	56.5%	7	50.0%	0	11.7%	0	0.0%	0	0.0%	0	44.6%	3	0.0%	0	0.0%	0
Cinema	12.0%	65	18.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Gym / sports hall / swimming / ice sports	4.0%	22	2.3%	0	0.0%	0	3.8%	0	50.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	1	0.0%	0
Library	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Live music venues / gigs	6.1%	33	0.0%	0	0.0%	0	12.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	72.6%	5	0.0%	0	0.0%	0
Meeting family / friends	10.4%	57	26.9%	2	38.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nightclub	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Place of worship	0.3%	2	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pubs / bars	22.6%	123	5.3%	0	76.6%	8	44.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Takeaways / fast food	5.8%	32	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Theatre / shows	12.7%	69	30.3%	3	0.0%	0	34.1%	4	0.0%	0	0.0%	0	0.0%	0	30.1%	0	27.4%	2	0.0%	0	0.0%	0
To work	3.4%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Food shopping	2.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	61.2%	2	0.0%	0	69.8%	1	0.0%	0	0.0%	0	0.0%	0
Gardens / green spaces / parks	1.3%	7	22.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Go for a walk	2.3%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Health appointment	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Non-food shopping	3.1%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	4
Services such as post office, laundrette, vets, etc.	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	69.8%	1	0.0%	0	0.0%	0	0.0%	0
Visit place of education	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	6.6%	36	0.0%	0	16.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		547		9		10		12		0		3		0		1		8		1		4
Sample:		396		14		9		7		2		3		0		2		4		1		1

Q26 What improvements or attractions would make you visit (CENTRE MENTIONED AT Q16) more often in the evening? [MR]
Not those that said '(Don't visit ANY centres for shopping or services)' or '(Don't know / varies)' at Q16 or 'Never' at Q24

	Total		Dunfermline Town Centre		Dunkeld Town Centre		Edinburgh City Centre		Kirkcaldy Town Centre		Dunblane Town Centre		Coupar Angus Town Centre		Alyth Town Centre		Glasgow City Centre		Cupar Town Centre		St Catherines Retail Park, Perth	
Better range of cafes / restaurants / pubs	13.0%	71	0.0%	0	3.3%	0	0.0%	0	0.0%	0	61.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	4
More live music / concerts	3.5%	19	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More outdoor entertainment / events	3.1%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	61.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A cinema	2.9%	16	5.3%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Public transport running later / more services	2.7%	15	0.0%	0	7.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bowling alley	2.7%	15	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More attractive environment	2.5%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	61.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Shops / venues open later	2.3%	13	0.0%	0	0.0%	0	0.0%	0	50.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pubs open later	1.6%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better cinema experience	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved range of shops	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More for families to do	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More for families to do	1.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better street lighting	1.1%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A theatre	1.0%	6	13.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved safety and security	1.0%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - lower parking prices	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better theatre experience	0.9%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Snooker / pool clubs	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - more secure / safe	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Crazy golf	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Ghost / history walks	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Light art installations	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lower prices for food/drink in venues (including pubs/restaurants)	0.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - more spaces / easier to park	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better theatres	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More / better cinemas	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Parking - free parking	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Better disabled access	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cleaner / better maintained streets	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cultural venues open at night e.g. museums / galleries	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing / very little)	42.3%	232	37.2%	3	51.2%	5	60.4%	7	50.0%	0	38.8%	1	0.0%	0	100.0%	1	100.0%	8	0.0%	0	0.0%	0
(Don't know)	15.8%	86	38.7%	3	38.0%	4	39.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	1	0.0%	0
Weighted base:		547		9		10		12		0		3		0		1		8		1		4
Sample:		396		14		9		7		2		3		0		2		4		1		1