

Roderick MacLean Associates Ltd
Planning & Development Consultancy

Dunblane Convenience Retail Requirements Study

Final report

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1 Introduction and approach

1.1 Terms of the brief

1.1.1 **Roderick MacLean Associates Ltd** was commissioned by Stirling Council to undertake a detailed review of the retail capacity in Dunblane to support new supermarket floorspace, including appraisal of the retail assessments submitted in support of three supermarket development proposals in Dunblane. These include the application for a supermarket at Barbush (Gladman Developments) and the expressions of interest from the Main Issues Report for a supermarket at Kippenross (Vico) and also at the Golf Club (Kippendavie Trust).

1.1.2 A retail capacity assessment has been provided by the consultants for Kippenross, with capacity and retail impact assessments provided by consultants in support of Barbush and Kippendavie.

1.1.3 The *Stirling Convenience Retail Requirements Study 2010*, provided a rough estimate of the spare capacity in Dunblane, as the main focus of the study related to future superstore provision in Stirling. The study estimated that there was very limited spare capacity (£8.4 million) to support additional convenience floorspace in Dunblane. However, the parties currently pursuing supermarket proposals believe that there is more capacity and the purpose of this review is to examine the issue in detail. The findings will contribute to the emerging Stirling Local Development Plan. The Proposed Plan is intended for publication in October 2011.

1.1.4 The main elements of the consultancy brief are as follows:

- Review the three retail assessments in terms of robustness, accuracy and possible errors or omissions;
- Assess the reasonableness of the three retail assessments in terms of their assumptions and conclusions on convenience capacity and retail impact on established centres and stores, including the methodologies employed;
- Consider whether the convenience capacity estimates from the Stirling Retail Requirements Study 2010 require to be updated or amended, taking account of any

weaknesses or uncertainties associated with the figures;

- Consider expressing the convenience capacity in Dunblane as a range; and
- Provide an independent view on the impact of the three proposed supermarkets on established centres and stores.

1.2 Approach

1.2.1 The approach adopted in this Study is to provide a detailed independent assessment of the retail impact of the proposed supermarkets and draw conclusions on the future capacity to support additional convenience floorspace in Dunblane. The assessment of other consultants' assumptions runs alongside, by topic, to facilitate easy comparison.

1.2.2 This Study also contains some updates and attempts to draw on evidence wherever possible, while recognising that retail impact analysis always incorporates a fair measure of assumptions.

1.2.3 The Study also takes account of *qualitative* considerations in the potential provision of new convenience floorspace in Dunblane.

1.2.4 In the Study, the target design year for testing retail impact is **2015**, with all values expressed in constant **2009 prices**. The consultants' assessments also include data for 2013 and 2015 and one assessment adopts the earlier date for impact analysis. All are in 2009 prices. The base year is taken as 2010, to allow consistency with the all submissions and the Council's 2010 Study.

1.2.5 Note that the tables in this report are Excel based, with rounded figures.

2 Turnover of the proposed Dunblane supermarkets

2.1 Introduction

2.1.1 This section reviews the estimated turnover of each of the three proposed supermarket developments in Dunblane.

2.2 Barbush supermarket

2.2.1 Table 2.1 shows the estimated turnover of the proposed supermarket by Roderick MacLean and also by Hargest & Wallace, planning consultants for the applicants, who provide estimates with: (1) no declared operator and (2) with a Tesco relocation to Barbush.

2.2.2 There is no particular issue with Hargest & Wallace's estimates of the turnover of

the Barbush supermarket, although the average turnover/ floorspace ratio for Tesco in Mintel's Retail Rankings 2011 is lower than the figures applied by Hargest & Wallace and the figure in the *Stirling Retail Capacity Study Update 2009* by Roger Tym. The same figure was applied again in the *Stirling Convenience Retail Requirements Study 2010*, for consistency. There is often a difference in interpretation of turnover ratios and there are different sources too, which are usually Mintel and Verdict. Nevertheless, application of the lower turnover ratio for Tesco will not prejudice the proposals; rather the opposite. Published company average turnover/ floorspace ratios provide a benchmark, so they are important in terms of assessing levels of new floorspace that can be supported.

Table 2.1				
Barbush supermarket (Gladman)- floorspace and estimated turnover (in 2009 prices)				
(under H&W Scenario 1)				
<i>(as estimated by Roderick MacLean)</i> assuming no declared operator	Floorspace sq m		Turnover £ per sq m	Turnover £million
	gross	net		
Total	3,900	2,325		23.7
convenience (70%)		1,628	11,600	18.9
comparison (30%)		698	6,960	4.9
Note				
The floorspace reflects the areas provided by the applicants. Hargest & Wallace RIA, Table 5 in Appendices B&C				
The turnover ratio is drawn from the Retail Rankings 2011 and comprises the average for Morrisons, Sainsbury, Tesco and ASDA. adjusted to remove petrol sales and with an allowance for VAT added				
<i>(as estimated by Roderick MacLean)</i> assuming Tesco relocation				
Total	3,900	2,325		23.0
convenience (70%)		1,628	11,257	18.3
comparison (30%)		698	6,754	4.7
Note				
Turnover ratio for Tesco from the Retail Rankings 2011, adjusted to remove petrol sales and add an allowance for VAT				
<i>(as estimated by Hargest & Wallace)</i> Scenario 1- no declared operator- average turnover ratio from 4 main operators applied				
Total	3,900	2,325		22.5
convenience (70%)		1,628	11,000	17.9
comparison (30%)		698	6,600	4.6
<i>(as estimated by Hargest & Wallace)</i> Scenario 2-Tesco relocation				
Total	3,900	2,325		26.6
convenience (70%)		1,628	13,000	21.2
comparison (30%)		698	7,800	5.4

2.3 Kippenross supermarket

2.3.1 Table 2.2 shows the estimated turnover of the proposed supermarket by DPP at Kippenross, which represents a potential relocation of Tesco from its existing store in Dunblane. Again, the applied turnover ratio seems quite high.

2.4 Golf Club site- Kippendavie

2.4.1 Table 2.3 shows the estimated turnover of the proposed supermarket by GVA Grimley on the site promoted by the Kippendavie Trust. There is no declared operator. The convenience turnover applied by the consultants appears too low and does not seem to relate clearly to any published averages. It appears to rest on what they think it should be, with trading conditions in Dunblane. If the applied turnover is unrealistically low, the effect will understate the potential trade diversion and impact on established centres and stores.

2.5 Overview

2.5.1 The proposed stores at Barbush and at Kippenross are close in scale, but the Kippendavie store is larger. The main range of the estimated convenience turnover is between about £18 to £21 million, which is not a wide difference. All the proposals could be described as mid-size supermarkets, where the range is typically 3,000 to 5,000 sq m gross.

2.5.2 Before considering retail capacity and impact, any of the supermarket proposals would provide a major qualitative upgrade to the existing food store provision, in terms of their scale and offer. In fact, to achieve a significant upgrade in Dunblane, the size of supermarket could not be much smaller than any of the current proposals in order to contain the necessary range and quality of goods on offer.

2.5.3 Nevertheless, an important contextual point is that, with no relocation of Tesco, the convenience turnover of an additional supermarket would amount to about as much as the turnover of the entire existing convenience floorspace in Dunblane.

Table 2.2				
Kippenross supermarket (Vico)- floorspace and estimated turnover (in 2009 prices)				
(Tesco relocation)				
<i>(as estimated by Roderick MacLean)</i>	Floorspace sq m		Turnover £ per sq m	Turnover £million
	gross	net		
Total	4,200	2,730		26.4
convenience (65%)		1,775	11,257	20.0
comparison (35%)		955	6,754	6.5
Note				
The floorspace reflects the areas provided by the applicants.DPP RIA, Table 9 on page 28				
The turnover ratio for Tesco is drawn from the Retail Rankings 2011, adjusted to remove petrol sales and with an allowance for VAT added				
<i>(as estimated by DPP)</i>				
Total	4,200	2,730		32.2
convenience (65%)		1,775	13,705	24.3
comparison (35%)		955	8,262	7.9

Table 2.3 Golf club site- supermarket (Kippendavie Trust)- floorspace and estimated turnover (in 2009 prices)				
<i>(as estimated by Roderick MacLean)</i>	Floorspace sq m		Turnover £ per sq m	Turnover £million
	gross	net		
Total	4,645	2,787		27.8
convenience (65%)		1,812	11,600	21.0
comparison (35%)		975	6,960	6.8
Note				
The floorspace reflects the areas provided by GVA Grimley in their Appendix 1, Table 11				
The turnover ratio is drawn from the Retail Rankings 2011 and comprises the average for Morrisons, Sainsbury, Tesco and ASDA. adjusted to remove petrol sales and with an allowance for VAT added				
<i>(as estimated by GVA Grimley)</i>				
Total	4,645	2,787		21.1
convenience (65%)		1,812	9,762	17.7
comparison (35%)		975	3,500	3.4
Note				
The floorspace reflects the areas provided by GVA Grimley in their Appendix 1, Table 11				
The turnover ratios derive from GVA Grimley, Appendix 1, Table 11- based on their assumed potential to capture 50% market share of the Dunblane primary catchment expenditure potential				

3 Primary catchment area

3.1 Defining the primary catchment area

3.1.1 The primary catchment is where most of the expenditure to support a new supermarket will come from i.e. it will account for most of the trade draw. It is determined by the distribution of population, drive times and the distribution of existing and proposed supermarkets and shopping centres, together with the size of the proposed new supermarket. For guidance, Table 3.1 shows the indicative drive times and distances from Dunblane and Stirling to other towns.

3.1.2 It is worth noting that the travel time from nearby Bridge of Allan to Dunblane is much the same as the travel time to Stirling. Therefore a new mid-size supermarket in Dunblane would probably struggle to compete with the attractions of the Stirling superstores, in terms of potentially serving Bridge of Allan residents.

Definition of the primary catchment area of Dunblane is critical to determine the associated expenditure capacity to support new convenience floorspace in the town. The approach in this report is to assess the extent of the existing primary catchment, before estimating the potential additional trade draw from a wider area relating to the development of a new supermarket.

3.2 NEMS Household surveys

3.2.1 The Kippenross proposal is supported by a household telephone interview survey by NEMS, with a sample size of 500 covering the wider Dunblane area. Responses to the shopping survey are provided in detail in DPP's retail assessment, which is helpful to all parties. Hargest & Wallace also draw from the NEMS survey data in DPP's report.

3.2.2 GVA Grimley refer to another NEMS household survey of about 1,100 in 2009, covering a very wide area which extends to include Bridge of Allan, Crieff, Auchterarder and west of Callander. It was a bespoke survey for GVA Grimley. Nevertheless, they too, also adopt DPP's NEMS survey in 2010 as the most robust source of shopping data

relating to Dunblane at present, as explained on page 15 of GVA Grimley's Retail Assessment.

3.2.3 Thus, there is a consensus that the NEMS survey for DPP is the best source of data on shopping patterns to assist definition of the primary catchment of Dunblane. It is important evidence from the point of view of this Study.

3.3 Dunblane new supermarket catchment

3.3.1 All the consultants recognise the findings of the NEMS survey in the DPP retail assessment, which has shaped their appraisal of the likely primary and secondary catchments of a new supermarket in Dunblane. The survey responses on main food and top up shopping are reproduced in Appendix 1 of this Study.

3.3.2 Hargest & Wallace and DPP both conclude that postcode sectors FK15-0, FK15-9 and FK16-6 represent the existing primary catchment of Dunblane. Hargest & Wallace do not include any part in Perth & Kinross in their defined primary catchment. So there is arguably an inconsistency with this definition in relation to the NEMS survey, which is understood to include the whole of FK15-0 and FK15-9, including those parts in Perth & Kinross.

3.3.3 The consultancies accept that the survey findings show that postcode sectors PH4-1 (Blackford), PH5-2 (Muthill) and FK9-4 (Bridge of Allan) do not relate closely to Dunblane for food shopping at present. Both consultancies consider that the introduction of a new supermarket would attract new trade from these currently, weakly related, areas.

3.3.4 Map 3.1 shows the primary and secondary catchment areas defined by Hargest & Wallace, which combine to form the total catchment of the new supermarket. Map 3.2 shows a similar potential catchment area defined by DPP, who explain in paragraph 6.4 of their retail assessment that a new supermarket would widen the existing Dunblane catchment, to the extent of drawing

Table 3.1		
Indicative drive times - Dunblane /Stirling		
Drive times and distances	Time minutes	Distance miles
Dunblane		
to:		
Bridge of Allan	6	3.0
Doune	9	4.6
Stirling	12	6.0
Blackford	16	9.6
Callander	20	12.0
Auchterarder	21	13.1
Crieff	32	16.2
Stirling		
to:		
Bridge of Allan	6	3.2
Doune	14	8.9
Callander	24	16.1
AA Routeplanner		

some 10% of the turnover from beyond the existing primary catchment.

3.3.5 GVA Grimley define postcode sectors FK15-0, FK15-9 and FK16-6 as the primary catchment, as illustrated (not very clearly) in Map 3.3. They differ in approach from the other consultants by including PH4-1, PH5-2 and FK9-4 within a very wide secondary catchment area extending beyond Callander. Given that they don't apportion much trade draw from this wide area in the end, the extensive calculations could have been safely substituted with a simple estimate.

3.3.6 **Commentary-** It is considered that the consultancies have adopted a robust, survey based approach to defining the primary catchment.

3.3.7 The inclusion of the whole of postcode sectors FK15-0, FK15-9 and FK16-6 as the primary catchment are very reasonable assumptions made by GVA Grimley and DPP. It is also reasonable to assume that postcode sectors PH4-1, PH5-2 and PH9-4 would largely form the secondary catchment, with some trade drawn from beyond. Map 3.4 by Roderick MacLean illustrates the primary catchment boundary distinctly.

3.4 Catchment population

3.4.1 Table 3.1 shows the primary and secondary catchment population, as estimated by R MacLean, based on the postcode sector populations, projected to 2015 from the Council's '100K forecast' for the Stirling

Council area, as shown in the Roger Tymes' Retail Study Update 2009. In fact, it is slightly complicated in that the published Census data combines FK15-0 and PH4-1 and FK15-9 and PH5-2 because the population in these PH codes is small, and the Census retains confidentiality through 'suppression' of small area data. However, the populations of these small areas can be deduced from the Census 'localities' population data for Blackford and Muthill, as shown in Table 3.1.

3.4.2 The primary catchment population is nearly 12,200 in 2010, rising very slightly to nearly 12,350 by 2015. The secondary catchment is around 8,400, mainly because of the large population in FK9-4 (Bridge of Allan).

3.4.3 Note that in the Stirling Convenience Requirements Study 2010, the primary catchment of Dunblane was never defined on a map, but related to postcode sectors FK15-0 and FK15-9 from the Roger Tym Study. The NEMS survey reveals that FK16-6 should be now be included.

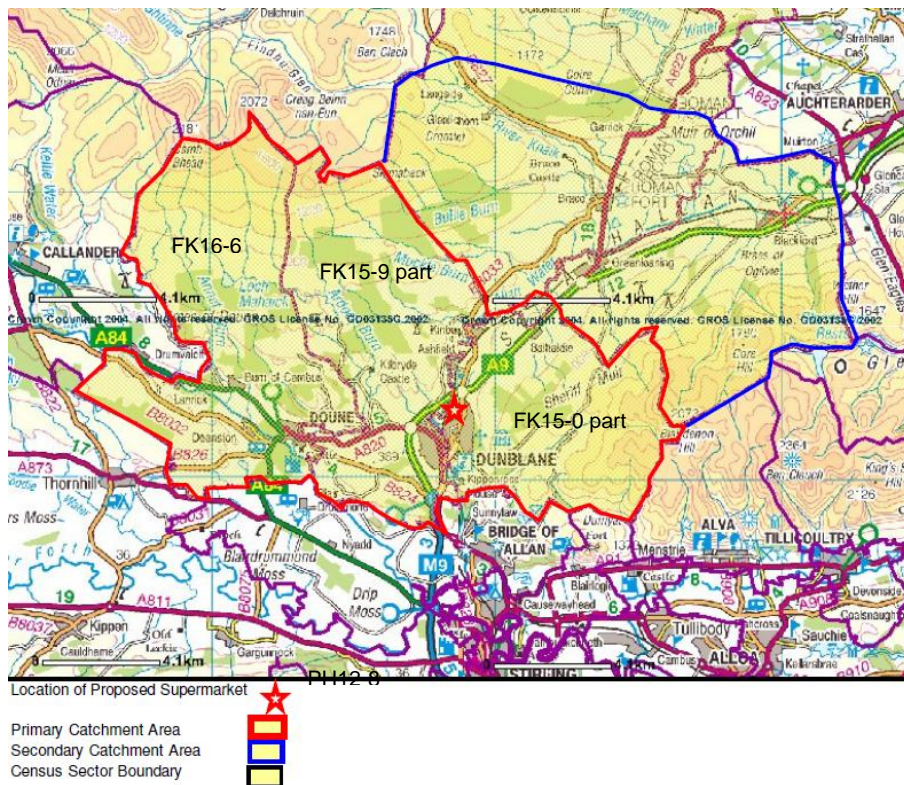
3.4.4 DPP estimate that the primary catchment population was nearly 12,800 in 2010 and nearly 12,900 in 2015, based on the population estimates from the Registrar General (their Table 3- assumed to be 2008 based). GVA Grimley forecast similar figures in their Appendix 1, Table 1- 12,574 in 2010 and 12,891 in 2015, based on Experian's 2006 based population projections.

3.4.5 Hargest & Wallace estimate a population of nearly 11,200 currently, based

on their smaller primary catchment, which is projected forward on the basis of the Council's 100K forecasts for the Council area. The consultants estimate a secondary catchment of just over 2000, based on 50% of FK15-9 in Perth & Kinross, while excluding FK9-4 altogether. This analysis is one step further than that shown in Table 3.2, which does not show the trade draw at this stage. However, it reveals some concurrence with the author of this Study that the potential trade draw from Bridge of Allan may be pretty low.

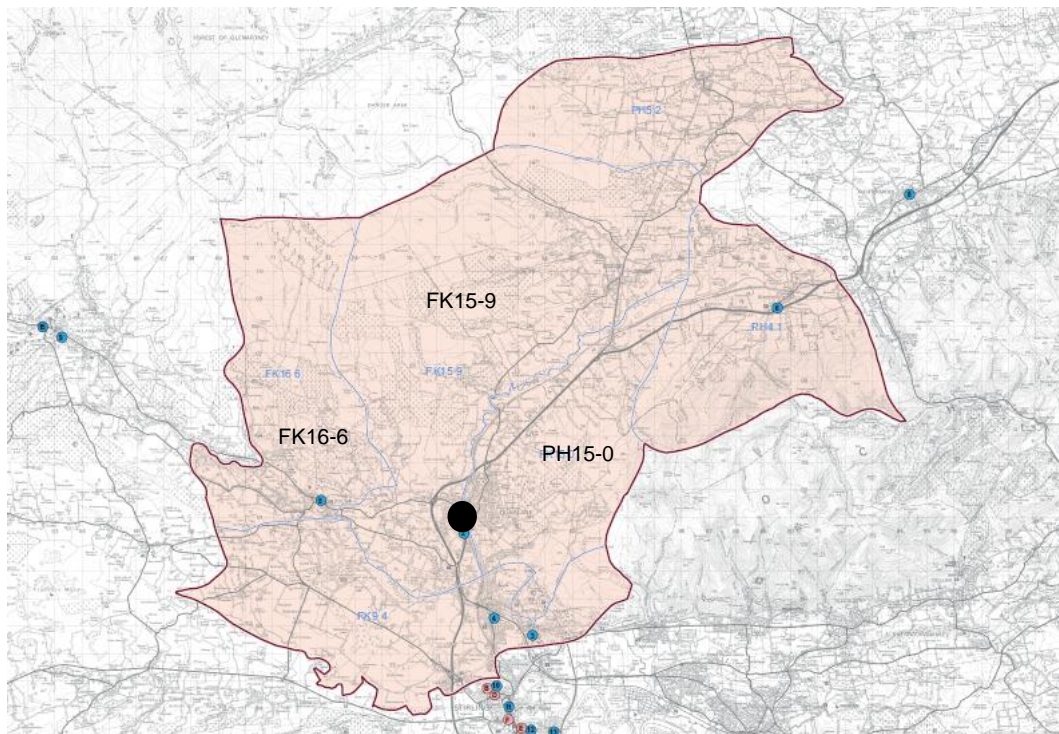
3.4.6 **Commentary-** the population growth estimates by DPP and GVA Grimley appear slightly higher than those based on the Council's forecasts, but not greatly so.

Map 3.1 Dunblane supermarket primary catchment - Hargest & Wallace

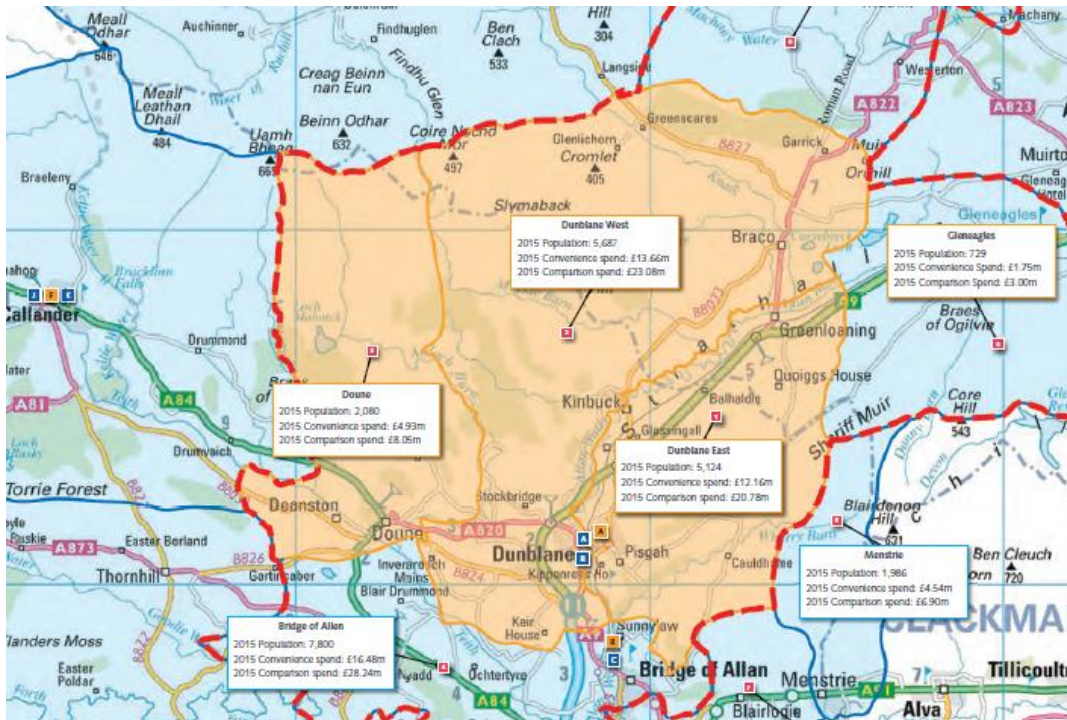


(area enclosed by red boundary line)

Map 3.2 Dunblane supermarket main catchment - DPP

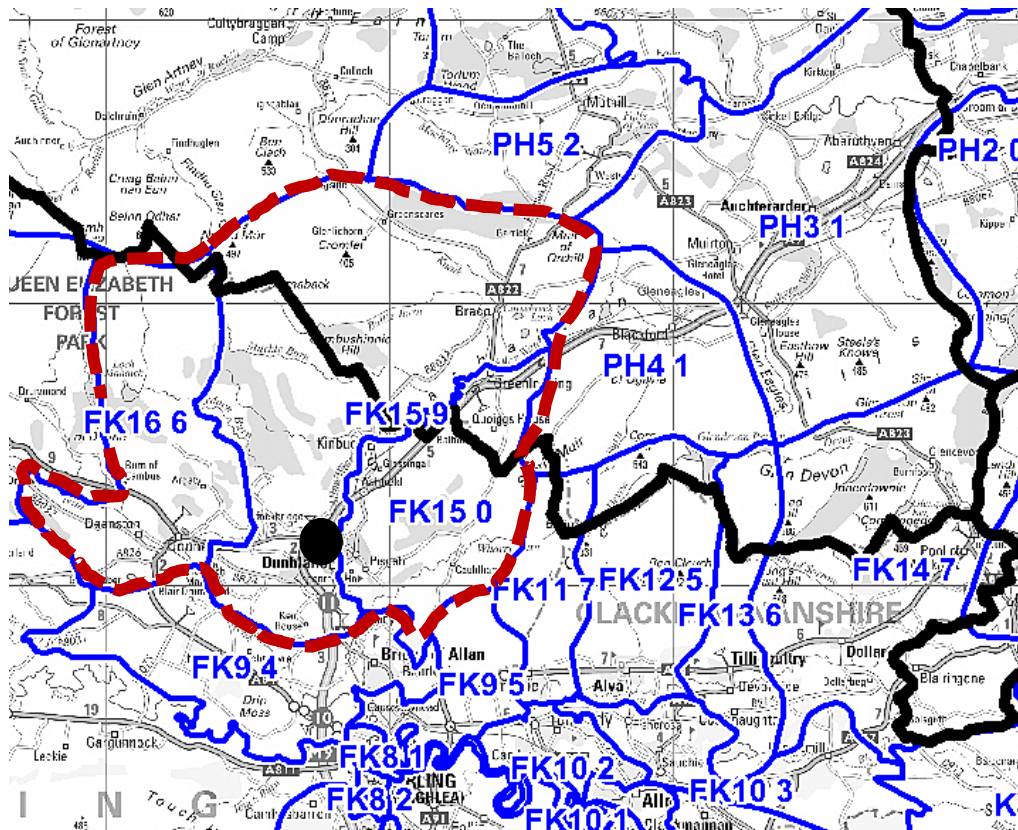


Map 3.3 Dunblane supermarket main catchment- GVA Grimley



(area coloured orange)

Map 3.4 Dunblane supermarket main catchment - R MacLean



(area enclosed in red dashed boundary line)

Table 3.2 Dunblane- convenience retail catchment population (estimated by R MacLean)					
	2001 Census	2009	2010	2013	2015
<i>Primary catchment</i>					
FK15-0- part (Stirling Council)	3,978				
FK15-0 -part (Perth & Kinross Council)	509				
FK15-9 -part (Stirling Council)	4,809				
FK15-9 -part(Perth & Kinross Council)	888				
FK16-6 (Stirling Council)	1,992				
Total	12,176	12,145	12,179	12,281	12,349
<i>Secondary catchment</i>					
PH4-1 Blackford (Perth & Kinross Council)	520				
PH5-2 -Muthill (Perth & Kinross Council)	770				
FK9-4- part B of Allan (Stirling Council)	7,119				
Total	8,409	8,388	8,411	8,482	8,528
Note:					
Bridge of Allan/ Dunblane area population growth to 2009 and 2015, based on the Council's 100K Scenario for the Council area from Roger Tyms 2009 Study Update, Table 3.2, reproduced in the Stirling Convenience Requirements Study 2010, Table 2.1					
	18,593	18,546	18,598	18,753	18,857

4 Convenience expenditure and turnover

4.1 Introduction

4.1.1 This section contains an analysis of the expenditure and turnover relationships for the Dunblane primary catchment, and a review of these estimates by the other consultants. Table 4.6 provides a summary and comparison of the key figures between the consultants, for ease of reference.

4.2 Convenience expenditure potential

4.2.1 Table 4.1 shows the expenditure per capita in 2010 and 2015 for the Dunblane primary catchment. The figures derive from the Stirling Retail Capacity Update 2009, by Roger Tym, as shown in the footnote.

4.2.2 Table 4.2 shows the total convenience expenditure potential of residents of the primary and secondary catchment areas defined by Roderick MacLean. The primary catchment expenditure is estimated at about £28 million in 2010, rising to £29 million by 2015.

4.2.3 The figures are higher than the approximate estimate of £24 million in the Stirling Convenience Retail Requirements Study because the area includes postcode sector FK16-6 (Doune). In fact this area should be incorporated into the Dunblane catchment in any future retail studies for the Council.

Table 4.1 Dunblane catchment: convenience expenditure per capita per annum (in 2009 prices)				
Source- Roderick MacLean	2009 £	2010 £	2013 £	2015 £
Primary catchment	2,328	2,333	2,349	2,360
Secondary catchment	as above			
Note From Stirling Retail Capacity Update 2009- Roger Tym, Table 3.3. The figures are for the Bridge of Allen/ Dunblane catchment, so they will be a close proxy for Dunblane itself.				

Table 4.2 Dunblane primary and secondary catchments: convenience expenditure potential (in 2009 prices)			
	2010 £million	2013 £million	2015 £million
Primary catchment	28.4	28.9	29.1
Secondary catchment	19.6	19.9	20.1
Note From Tables 3.2 and 4.1			

Table 4.3 Dunblane primary catchment: estimated convenience expenditure patterns, assuming average turnover levels (in 2009 prices)			
	%	2010 £million	2015 £million
Dunblane local catchment residents' expenditure potential		28.4	29.1
Add: inflows	6%	1.7	1.7
Less: outflows	-30%	-8.5	-8.7
Retained expenditure (turnover)		21.6	22.1
Note From Table 4.2 . Basis of the estimated expenditure patterns are described in the text			

Table 4.4
Dunblane primary catchment: estimated convenience expenditure patterns based directly on the NEMS survey (in 2009 prices)

	%	2010 £million	2015 £million
Dunblane local catchment residents' expenditure potential		28.4	29.1
Add: inflows	5%	1.5	1.5
Less: outflows	-39%	-11.1	-11.4
Retained expenditure (turnover)		18.8	19.3
Note			
Assumes 39% leakage from the primary catchment and 5% inflow from the secondary catchment			

4.2.4 Hargest & Wallace forecast the convenience expenditure potential of their smaller primary catchment to be £26.7 million in 2013. DPP estimate the convenience potential for the same primary catchment area as £30.5 million in 2015, based on a slightly larger population estimate. Similarly, GVA Grimley forecast the convenience expenditure potential as £30.7 million in 2015, from Table 2 in Appendix 1 of their retail assessment.

4.2.5 **Commentary-** there are no particular issues with these forecasts of residents' expenditure potential, in terms of how they relate to the primary catchments defined by each consultant- see Table 4.6.

4.3 Expenditure patterns

4.3.1 The estimated convenience expenditure patterns for the primary catchment by Roderick MacLean are shown in Table 4.3. These derive from the NEMS household survey in Appendix 1, with a modification which reduces the assumed outflow, as explained in the following paragraphs. Details of the analysis are provided in Appendix 1, which include weighting of main food and top up shopping to provide a comprehensive assessment.

4.3.2 Expenditure inflows are currently likely to be very low, because Dunblane is a small town with limited shopping facilities. Analysis of the main food and top up shopping in Appendix 1 suggests that inflows from the secondary catchment may equate to 5% of the primary catchment residents' expenditure potential. It is reasonable to increase this to **6%** to allow for inflow from other areas.

4.3.3 Expenditure outflows are high, and the survey findings suggest leakage equivalent

to 39% of the expenditure potential of the residents of the primary catchment. This proportion is also accepted by DPP and GVA Grimley. However, this level appears unrealistic against the anticipated level of average turnover associated with the stores in the catchment. If the leakage is 39%, the shops would be under trading by a considerable amount, which does not seem credible, especially in view of the argument for introducing a new supermarket. This is illustrated in Table 4.4.

4.3.4 The issue is probably to do with the household survey itself. While this type of survey is probably the best among alternatives, it is prone to exaggerating the attraction to the largest centres and superstores relative to smaller centres and shops, because of the nature of the questions. In this case, it is probably over stating the attraction to the superstores in Stirling. An associated issue is that household surveys, in general, are best when applied to wide areas and least reliable when applied to the turnover and market shares of individual stores.

4.4 Primary catchment turnover at average levels

4.4.1 Taking account of the considerations referred to in the previous paragraph, the estimated outflow in Table 4.3 has been reduced to **30%**, on the assumption that the stores in the primary catchment are trading at average levels, resulting in a total turnover of £21.6 million in 2010 and £22.1 million in 2015. The estimate of total turnover in Table 5.5 of the *Stirling Convenience Retail Requirements Study 2010* is almost identical at £21.5 million, although with some differences in floorspace and turnover ratios.

4.4.2 Among the consultants, DPP estimate a turnover of £20.6 million in 2015 in their Table 7, based on average turnover levels. GVA Grimley estimate a turnover of £20.8 million at average levels in 2015 in their Table 3. However, these consultants do not suggest that the shops are trading at average levels.

4.4.3 Hargest & Wallace estimate that the Dunblane convenience shops would be trading at £18.2million in 2013, with 31% leakage from the primary catchment in their Tables 3 and 4. This turnover level appears too low, but the estimates are properly linked to interpretation of expenditure patterns.

4.4.4 **Commentary-** the estimates of total convenience turnover at *average* levels by DPP and GVA Grimley are very similar and Roderick MacLean's estimate is only a little higher. There is no particular issue with the total figures, except that the estimates by Hargest & Wallace appear rather low- See Table 4.6.

4.4.5 At a detailed level, there is an issue with the turnover for M&S, which the consultants ascribe a low total turnover, mainly due to low estimates of net floorspace. Hargest & Wallace also apply a low turnover ratio.

Table 4.5					
Dunblane primary catchment: convenience floorspace and turnover in 2010 at average levels and directly from the NEMS survey, based on market share (in 2009 prices)					
	Floorspace sq m		at average levels		*Survey levels
	gross	net	Turnover £ per sq m	Turnover £million	Turnover £million
Dunblane	3,789	2,273		21.1	18.6
Tesco Metro	1,889	1,133	11,257	12.8	14.9
Marks & Spencer (total 1,466 sq m gross-est 75% conv)	1,100	660	10,644	7.0	2.7
Other shops	800	480	2,737	1.3	0.7
Doone	225	135	2,737	0.4	0.1
Braco	150	90	2,737	0.2	0.1
Total primary catchment	4,164	2,498		21.7	18.8
Notes					
The gross floorspace for Tesco and M&S derives from the Assessor. For other shops in Dunblane, the floorspace is based on Table 3.6 in the 2009 Retail Capacity Update by Roger Tym. For Doone/ Braco, the gross floorspace derives from Hargest & Wallace.					
The turnover ratios for Tesco and M&S derive from the company averages in the Retail Rankings 2011, with petrol sales deducted from the Tesco figure and an allowance for VAT added.					
The tiny difference between the total turnover and the expenditure based total in Table 4.3 is ignored					
* Turnover derived directly from the NEMS survey- market shares of the primary and secondary catchments- see Appendix 1					

4.5 Convenience floorspace

Table 4.5 shows the level and distribution of convenience floorspace in the primary catchment, together with the estimated turnover at average levels. Tesco and M&S are the principal convenience stores in Dunblane. The floorspace estimates in the Stirling Convenience Requirements Study 2010 have been updated by gross floorspace figures direct from the Assessor for this Study.

4.5.1 The Assessor is probably the most reliable source of gross floorspace data, in general. In fact, both these stores are larger than previously estimated, but the difference in

net floorspace is not great. It is fair to allow for the fact that part of the M&S store is not devoted to convenience sales, because there is a coffee shop and other customer facilities.

4.5.2 The estimated convenience floorspace by Hargest & Wallace appears too low, as does their estimated turnover for M&S in particular, when viewed against the company average in the Retail Rankings 2011. The M&S unit is actually quite large and appears to be trading well. The primary catchment floorspace is shown in Hargest & Wallace's Table 3, where the total is 3,105 sq m gross and 1,986 sq m net.

4.5.3 DPP estimate that the total convenience floorspace in the primary catchment is 4,946 sq m gross and 1,803 sq m net, in Table 5 within their Appendix 5. Although the estimate of net floorspace is low, high turnover ratios are applied, so the total turnover approaches the level estimated by Roderick MacLean.

4.5.4 GVA Grimley estimate that the total net convenience floorspace in the primary catchment is 2,287 sq m, which is close to the total estimated in Table 4.5 of this Study.

4.5.5 **Commentary-** the consultants' estimates of turnover would be probably be higher if they had based their floorspace estimates on data from the Assessor for M&S and Tesco.

4.6 Store turnover levels based on the NEMS survey

4.6.1 The turnover of the stores within the primary catchment can also be estimated from the survey findings, as shown in Table 4.5. As mentioned earlier, the outcome indicates some over trading for Tesco, but unrealistically low levels of turnover for the other shops in the primary catchment. The total turnover levels in 2013 and 2015, based on the market shares from the NEMS survey among the consultants are summarised below in Table 4.6.

4.6.2 **Commentary-** turnover estimates based on the survey alone do not allow reasonable turnover levels for shops other than Tesco.

Table 4.6 Dunblane primary catchment: summary of estimates of convenience expenditure, turnover and implied spare capacity (in 2009 prices)					
	Primary catchment area		Spare capacity		
	2013 £million	2015 £million	Leakage £million	Tesco over trading £million	Others under trading *£million
Hargest & Wallace (all forecast figures are for 2013)					
Primary catchment expenditure potential - Table 4 (smaller primary catchment than rest)	26.7				
Turnover at average levels-Table 4	18.2		8.5	0	0
Turnover based on market share from survey (no over trading)	18.2				
DPP					
Primary catchment expenditure potential- Table 4		30.5			
Turnover at average levels- Table 6 & Appendix 5, Table 5		20.6			6.1
Turnover based on market share from survey- Tables 11 & 12 w ith Tesco over trading by £3.2m- para 6.3)		17.8	12.8	3.2	
GVA Grimley					
Primary catchment expenditure potential- Appendix 1, Table 2		30.8			
Turnover at average levels- Appendix 1, Table 12		20.8			3.4
Turnover based on market share from survey- Tables 10 and 12 w ith £3.4m over trading at Tesco		20.8	11.9	3.4	
R MacLean					
Primary catchment expenditure potential		29.1			
Turnover at average levels		22.1	8.7	0	0
Turnover based on market share from survey		19.3			
Note					
* The implied under trading is deduced by R MacLean. For DPP, the under trading derives from their Appendix 5, Table 5 (turnover of other shops), minus the figure in Table 11					

5 Spare capacity to support a supermarket in Dunblane

5.1 Introduction

5.1.1 This section looks at the components of spare retail expenditure capacity in Dunblane.

5.2 Spare capacity

5.2.1 Spare retail expenditure capacity takes several forms, which include:

- Current over trading (where it exists);
- Forecast retained expenditure growth;
- Potential to recapture leakage;
- Potential to increase inflows; and
- 'Acceptable' levels of retail impact.

Roderick MacLean's estimates of spare capacity in Dunblane, relating to the above components is shown in Table 5.1.

5.3 Over trading & leakage

5.3.1 It is difficult to argue that there is any over trading in Dunblane, when the total turnover at average levels in the primary catchment would not be supported in Table 4.5 without the applied adjustment to reduce leakage from 39% from the direct survey findings, to 30%. It is noted in section 4 that DPP and GVA Grimley's estimates of total turnover at average levels are similar to those shown in Table 4.3 and 4.5.

5.3.2 Furthermore, if the survey based turnover levels in Table 4.4 are applied, the apparent moderate level of over trading at the Tesco store is offset by considerable under trading at the other stores- see Table 4.5. The combination of over trading and gross under trading (which includes M&S), does not rest comfortably together.

5.3.3 Hargest & Wallace do not assume over trading and they estimate the leakage to be around £8.5 million, which is close to the estimate by Roderick MacLean- see Table 4.6. Their figure would be higher if applied to the larger primary catchment defined by everyone else

5.3.4 DPP and GVA Grimley draw on the market share based estimates of turnover derived directly from the household survey. They refer to 39% leakage, based on the

survey, together with the associated turnover levels of Tesco, M&S and the other stores, based on market share. The outcomes are interpreted in Table 4.6 in the previous section, with Tesco over trading and the other shops under trading. Both consultancies draw on the over trading at Tesco as a contribution to the capacity, together with the higher level of predicted leakage.

5.3.5 Neither consultancy deducts the under trading shown in Table 4.6 from the capacity, which would be logical if one is claiming over trading too. So DPP claim about £16 million spare capacity, when it should be closer to about £10 million. GVA Grimley claim about £15 million spare capacity, when it should be about £12 million. In other words, the estimates of spare capacity start to converge downwards.

5.3.6 **Commentary-** the case for over trading at the Tesco store (based on the survey alone) is undermined by the implications for the turnover of other stores in Dunblane.

5.4 Expenditure growth

5.4.1 Forecast convenience expenditure growth rates are very low, as indicated in Tables 4.1 and 4.3 with regard to expenditure retained in the Dunblane primary catchment. None of the consultants have argued otherwise. Forecast convenience expenditure growth will make little contribution to supporting a new supermarket. From Table 4.3, the growth in retained expenditure (turnover) is only £0.6 million to 2015.

5.5 Potential to recapture leakage

5.5.1 The potential to recapture a significant proportion of the existing leakage from Dunblane is an important argument in support of a new supermarket.

5.5.2 Roderick MacLean estimates that a new supermarket could probably capture up to 70% of the leakage shown in Table 4.6, or £6.1 million.

5.5.3 The estimate of claw back of leakage by Hargest & Wallace (with no Tesco

relocation) can be deduced from their Tables 6 and 7, where the total turnover of the store (£17.9m) less trade diversion on the primary catchment shops (£8.19m), less inflows (£1.79 m) = claw back of leakage (£7.92m). Therefore Hargest & Wallace appear to assume that almost all leakage from their primary catchment would be clawed back- up to about 93% .

5.5.4 DPP estimate that the claw back of leakage to a new Tesco at Kippenross would be £5.83 million in their Table 13, which is close to the estimated potential in this Study.

5.5.5 GVA Grimley set out their assumptions on convenience floorspace deficiency in the table on paragraph 4.34 of their assessment. It refers to £11.87 million leakage in 2015, based on the household survey. In their Appendix 1, Table 13, they estimate that the leakage would be reduced to £2.98 million in 2015, which implies that development of the proposed supermarket at the Golf Club site would claw back £8.89 million, or 75% of their estimated leakage. While the proportion of claw back is close to the estimate in this Study, the amount of leakage appears high.

5.5.6 **Commentary-** the potential amounts of claw back of leakage estimated by Hargest & Wallace and GVA Grimley appear rather high against the probability that many residents of Dunblane will continue to be drawn to the range and choice of superstores and other shops in Stirling. With further likely improvements to the superstore offer in Stirling, it is probably unrealistic to rely on very high levels of claw back to support a new supermarket in Dunblane.

5.6 Potential to increase inflow

5.6.1 Development of a new supermarket in Dunblane would attract a proportion of new customers from beyond the primary catchment. The level of attraction will be limited though, because of the location of Dunblane and its limited overall local retail offer. Roderick MacLean estimates that about 15% of the turnover of a new supermarket in Dunblane could derive from new trade. This would amount to nearly £3 million or 10% of the primary catchment residents' expenditure potential.

5.6.2 Among the other consultants, there appears to be a consensus that the attraction of new trade will be limited. Hargest & Wallace estimate 10% (their Table 6) and GVA Grimley estimate is deduced at 13% (their Appendix 1, Table 11).

5.7 Acceptable levels of retail impact

5.7.1 Retail impact is defined in this report as *occurring where a new store drives the turnover of existing centres and stores to below their average trading levels*. It is expressed as a percentage below the average level. This definition takes account of the cushioning effects of any over trading and expenditure growth to 2015.

5.7.2 There is no universally accepted definition of the level of impact at which the viability of a town centre or store is threatened. For guidance, this author would commonly consider that impacts of 20% or higher could threaten the vitality and viability of established centres and stores. The level will also depend on the general trading performance of town centres and individual operators.

5.7.3 Retail impact is addressed in section 6.

5.8 Overview on capacity

5.8.1 Roderick MacLean estimates that the spare capacity relating to expenditure growth, claw back of leakage and the attraction of new trade would be around £9.6 million, plus capacity through 'acceptable' levels of retail impact which do not threaten established centres and stores.

5.8.2 Assuming a turnover ratio of £11,600 per sq m net, the total mainstream supermarket convenience floorspace that could be supported would be nearly 830 sq m net, plus a little more through impact- see Table 5.1. This conclusion is little different from the rough estimate of 700 sq m net which was made in the *Stirling Convenience Retail Requirements Study* in 2010. Allowing for some comparison sales, the spare capacity might support a supermarket of around 1,100 sq m net total, as indicated in Table 5.1.

5.8.3 There is no strong argument for over trading without further interpretation of the survey. The potential for claw back of leakage

is likely to be less than estimated by all three consultants.

5.8.4 However, in my opinion, the development of some 800 sq m net of additional convenience floorspace would not result in a significant uplift to the quality of convenience retail offer in Dunblane, if it is developed as an additional single small supermarket, or incrementally, as several small shops.

5.8.5 The potential to realise maximum qualitative improvement is most likely to be achieved by development of a single, mid-size

supermarket in Dunblane, instead of the small unit currently occupied by the existing mainstream operator.

Table 5.1 Spare convenience retail capacity in the Dunblane primary catchment in 2015 (in 2009 prices) (as estimated by R MacLean)			
			£million
Overtrading (none)			
Forecast turnover growth 2010-15 from Table 4.3			0.6
Potential to claw back leakage (70% of £ 8.7m leakage in Table 4.3)			6.1
Potential to attract new trade into Dunblane (equivalent to 10% of primary catchment expenditure potential (£29.1 million in Table 4.3)			2.9
Total			9.6
*Equivalent supermarket floorspace	<i>sq m net</i>	<i>sq m gross</i>	
<i>Convenience floorspace</i>			
Assuming £11,600 per sq m net	826		
<i>Comparison floorspace (assume notional 25% of total store floorspace)</i>	276		
Total supermarket floorspace (assuming 60% net/gross floorspace)	1,102	1,836	
Note			
There would also be some additional spare capacity relating to retail impact on the Dunblane stores, provided the level is not critical to their viability			
* The equivalent floorspace is only for broad guidance, as supermarket formats vary.			

6 Review of retail impact

6.1 Introduction

6.1.1 This section contains an assessment of the retail impact of introducing a new mid-size supermarket into Dunblane (a) *without* a Tesco relocation, and (b) *with* a Tesco relocation. A review of the retail impact assessments by Hargest & Wallace and by GVA Grimley is provided alongside. DPP did not produce a retail impact assessment.

6.2 Impact tests

6.2.1 Given that the differences in net convenience floorspace in the three proposed supermarkets are not large, it is proposed to run a test impact analysis on the Barbush supermarket under a 'no Tesco relocation' scenario. It is slightly smaller than the Kippendavie proposal, therefore it makes sense to review the outcome of the smallest proposal first. The analysis will be relevant to Kippendavie too, as this report only considers issues relating to retail capacity and impact, not location.

6.3 Trade draw and trade diversion

6.3.1 Table 6.1 shows the assumed patterns of trade draw and trade diversion by Roderick MacLean under scenario (a), no Tesco relocation. The limited amount of claw back of leakage means that about 50% of the trade diversion would fall on the Dunblane shops. Table 6.2 demonstrates the very high levels of retail impact that would follow, which are much greater than the guidance on 20% impact as a critical threshold, as described in section 5. There would be extensive rationalisation, with a threat to the vitality of the small shops in the town centre

6.3.2 It is difficult to see how the Tesco store could continue trading, except at a dramatically lower level. Under this scenario, local customers could end up with reduced choice.

6.3.3 Table 6.3 provides a summary of the trade draw, trade diversion and retail impacts (against average levels) provided by Hargest & Wallace and GVA Grimley, for comparison. The percentages relate to their

clients' proposals at Barbush and the Golf Club site at Kippendavie respectively, based on their own figures. The main difference is that the consultants rely much more on the assumed level of claw back of leakage, which the findings of this Study do not really support.

6.3.4 Table 6.4 shows the trade diversion and retail impact assessments by Hargest & Wallace and GVA Grimley. It would appear that, *even by their own analysis, very high levels of impact will be experienced by Tesco and M&S*. The difference between the turnover of M&S at average levels estimated by GVA Grimley, and their ultra low turnover based on the survey, means that the impact appears very high indeed.

6.3.5 The fact that neither of these consultancies has shown any impact arising on the small town centre shops is not a credible outcome. There is no reason to suppose that major multiples would suffer high impact, and not small independent shops.

6.3.6 Both Hargest & Wallace and GVA Grimley conclude that the vitality and viability of Dunblane town centre, and other established centres, would not be threatened by the introduction of their clients' supermarket proposals. This conclusion is reached because they do not assume realistic levels of trade diversion on the town centre, while selectively allocating it to the out of centre foodstores.

6.4 Trade diversion with a Tesco relocation

6.4.1 Table 6.5 shows the trade diversion and retail impact associated with a Tesco relocation, on the basis of the store size shown in Table 2.2 (Kippenross). The closure and relocation of the existing Tesco Metro would account for most of the turnover. The additional floorspace would also claw back a significant level of leakage. The predicted levels of impact on the town centre could be sustained without threatening its vitality and viability, in the opinion of this author. This view applies strictly to issues relating to retail capacity and impact, not development site options.

6.5 Conclusions

6.5.1 The introduction of a mid-size supermarket into Dunblane would result in very high levels of impact on the town centre convenience shops, and on Tesco and M&S. The expenditure capacity from the local population is too small to support an additional supermarket of the sizes proposed. However, relocation of the existing mainstream operator to a larger, mid-size supermarket, could be supported, purely in terms of retail capacity and impact.

6.5.2 It is stressed that this conclusion would apply to any mainstream operator with a presence in Dunblane. Nor does the conclusion embrace any consideration of the locational merits of the potential supermarket sites in Dunblane.

Table 6.1 (a) Barbush: overall convenience trade draw and trade diversion (in 2009 prices) (as estimated by Roderick MacLean)		
		Total
	%	£million
Trade draw		
from Dunblane primary catchment	85%	16.0
from beyond	15%	2.8
Total	100%	18.9
Trade diversion		
from Dunblane primary catchment	50%	9.4
on shops beyond:		
<i>from clawback of leakage (R MacL estimates 70% of total leakage of £8.7m in 2015)</i>	35%	6.6
<i>new trade</i>	15%	2.8
Total	100%	18.9
Note. No Tesco relocation See turnover of proposed supermarket in Table 2.1 (as estimated by R MacLean)		

Table 6.2 (a) Barbush: trade diversion (in 2009 prices) (as estimated by Roderick MacLean)					
	2010 Turnover -average £million (a)	2015 Turnover £million (b)	trade diversion to Barbush		% impact on av levels (a+c-b)/a
			%	£ million (c)	
Primary catchment area					
Dunblane	21.1	21.5			
Tesco Metro	12.8	13.0	35%	6.6	50%
Marks & Spencer	7.0	7.2	12%	2.3	30%
Other shops	1.3	1.3	2.5%	0.5	34%
Doune/Braco	0.6	0.6	0.5%	0.1	13%
Total primary catchment	21.7	22.1	50%	9.4	41%
Other centres beyond primary catchment					
<i>Mainly Stirling superstores</i>			50%	9.4	
Total			100%	18.9	
Note. No Tesco relocation					

Table 6.3 Dunblane: comparison between the consultants' overall trade draw and trade diversion assumptions			
	<i>H&W</i>	<i>GVA Grimley</i>	RMacL
	%	%	%
Trade draw			
from Dunblane primary catchment	90%	87%	85%
from beyond	10%	13%	15%
Total	100%	100%	100%
Trade diversion			
from Dunblane primary catchment	46%	42%	50%
on shops beyond:			
<i>from clawback of leakage</i>	44%	45%	35%
<i>new trade</i>	10%	13%	15%
Total	100%	100%	100%
<p>Note</p> <p>Assumptions on trade draw and trade diversion by Hargest & Wallace and GVA Grimley for their clients are shown in italics (H&W main case) Hargest & Wallace assumptions relate to a smaller primary catchment area than those of GVA Grimley and R MacLean</p> <p>H&W trade draw estimates are shown in Table 6 of their assessment. The trade diversion is shown in Table 8, with 46% from the primary catchment. The split of diversion relating to new trade and claw back of leakage is deduced on a similar basis as for GVA Grimley- see below .</p> <p>GVA Grimley trade draw estimates are shown in their Appendix 1, Table 11. This shows £15.38m from the primary catchment, out of £17.68 m conv turnover (87%). They also comment that 15% of the trade will be drawn from beyond the catchment, which does not quite match the figures quoted.</p> <p>GVA Grimley trade diversion estimates are shown in their Table 12. They predict 42% diversion from the primary catchment. By deduction, if diversion on stores outside the catchment relating to new trade is 13%, the trade diversion on stores outside the catchment relating to claw back of leakage will be 45%.</p>			

Table 6.4 Dunblane: estimates of trade diversion and retail impact on stores and centres by Hargest & Wallace and GVA Grimley						
	Hargest & Wallace			GVA Grimley		
	trade diversion		% impact on av levels	trade diversion		% impact on av levels
	%	£ million		%	£ million	
Primary catchment area						
Dunblane						
Tesco Metro	34%	6.18	45%	40%	6.15	21%
Marks & Spencer	11%	1.99	42%	2%	0.31	62%
Other shops	0.8%	0.13	-	0%	0.02	-
Doone/Braco		0	-		0	
Total primary catchment	46%	8.30		42%	6.48	
Other centres beyond primary catchment						
<i>Mainly Stirling superstores</i>	54%			58%		
Total	100%			100%		
<p>Note. No Tesco relocation. Also refers to H&W main case</p> <p>Hargest & Wallace Table 8</p> <p>GVA Grimley Appendix 1, Table 12: (column 6 - column 2)/ column 2</p> <p>Where a dash appears in this table, it denotes above average trading after impact- as estimated by the consultants</p>						

Table 6.5					
(b) Trade diversion and impact associated with a relocated Tesco (in 2009 prices)					
(as estimated by Roderick MacLean)					
	2010 Turnover -average £million (a)	2015 Turnover £million (b)	trade diversion to new Tesco		% impact on av levels (a+c-b)/a
			%	£ million (c)	
Primary catchment area					
Dunblane	21.1	21.5			
Tesco Metro	12.8	13.0	65%	13.0	closure
Marks & Spencer	7.0	7.2	4%	0.8	9%
Other shops	1.3	1.3	0.6%	0.1	7%
Doone/Braco	0.6	0.6	0.3%	0.1	7%
Total primary catchment	21.7	22.1	70%	13.2	
Other centres beyond primary catchment					
<i>Mainly Stirling superstores</i>			30%	5.7	
Total			100%	20.0	

Note. No Tesco relocation

7 Conclusions

7.1 Review findings

7.1.1 There appears to be a broad consistency among the consultants in support of new supermarket proposals in Dunblane, in terms of the primary catchment area, total expenditure potential and total turnover at average levels in the primary catchment. By and large, these estimates mostly appear reasonable.

7.1.2 The main unresolved issue, as far as this Study is concerned, is that, if the household survey patterns are applied directly, the existing convenience floorspace in Dunblane would be trading at below average levels in total. Within that total, Tesco would be over trading and the other shops, under trading by a substantial amount. At the same time, the level of leakage from the primary catchment will be over stated.

7.1.3 The Study concludes that this is not a sound basis for assessing the existing trading levels in Dunblane, nor estimating the capacity to support more convenience floorspace in Dunblane, without modifying the assumptions.

7.1.4 The independent retail impact analysis conducted in this Study shows that an additional new supermarket of the scale proposed at Barbush, for example, could not be supported without very high levels of impact, to the extent of threatening the vitality and viability of Dunblane town centre and the existing Tesco and M&S stores.

7.1.5 Interestingly, the consultants also predict very high levels of impact, but selectively on Tesco and M&S, without reasonable consideration of impact on the town centre. This assessment is not tenable, given that small independent shops tend to be quite exposed to trade loss to new supermarkets generally.

7.1.6 The Study also concludes that there is nominal spare convenience expenditure capacity of nearly £10 million relating to Dunblane.

7.1.7 The level of spare capacity predicted in this report would depend upon a mainstream operator to be realised, in order to

claw back significant levels of leakage. In other words, additional small independent stores, or another small supermarket, would not achieve much claw back of leakage or attraction of new trade

7.1.8 To achieve maximum uplift in the quality of convenience retailing in Dunblane, development of a single, mid-size supermarket run by a mainstream operator would be needed. Capacity constraints mean that this can be achieved by relocation of the existing mainstream operator, but not an additional supermarket. This conclusion relates strictly to capacity and retail impact only. It should not be read as an assessment of the locational merits of the three potential supermarket sites in Dunblane.

Appendix 1

NEMS household telephone interview survey 2010

(extract from the Retail Assessment by DPP–Appendix 3)

by Postcode Sector

Dunblane Household Survey for DPP

Weighted:

	Total	FK9 4	FK15 0	FK15 9	FK16 6	PH4 1	PH5 2							
Q01 At which one store do you buy most of your food and grocery shopping?														
Aldi, Stirling	1.5%	8	3.7%	6	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Auchterarder	0.9%	5	0.0%	0	0.6%	1	0.0%	0	0.0%	0	20.0%	4	0.0%	0
Co-op, Bridge of Allan	3.7%	18	11.1%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Callander	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Co-op, Crieff (aka Somerfield, Crieff)	2.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	60.0%	13
Lidl, Stirling	0.3%	1	0.0%	0	0.6%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
→ Marks and Spencer, Dunblane	4.7%	24	6.5%	11	2.8%	3	7.4%	9	0.0%	0	0.0%	0	0.0%	0
Morrison's, Stirling (aka Sprinkerse Retail Park)	10.0%	50	13.9%	23	8.5%	10	9.7%	12	10.0%	4	0.0%	0	0.0%	0
Sainsbury's, Stirling (aka Raploch)	14.6%	73	21.3%	35	13.6%	17	13.1%	16	10.0%	4	0.0%	0	0.0%	0
Tesco Metro, Callander	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
→ Tesco Metro, Dunblane	31.4%	157	0.9%	2	54.2%	66	55.4%	70	40.0%	18	10.0%	2	0.0%	0
Tesco Metro, Stirling	21.2%	106	38.0%	63	13.0%	16	10.9%	14	30.0%	13	0.0%	0	0.0%	0
Tesco Extra, Alloa	0.7%	4	0.9%	2	1.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Small Shops, Auchterarder	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small Shops, Bridge of Allan	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small Shops, Callander	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small Shops, Crieff	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
→ Small Shops, Doune	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
→ Small Shops, Dunblane	0.7%	3	0.0%	0	2.8%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small Shops, Stirling	0.3%	2	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / Home Delivery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Aberdeen	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Alloa	0.9%	4	0.0%	0	0.0%	0	0.0%	0	10.0%	4	0.0%	0	0.0%	0
Asda, Cumbernauld	0.1%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Perth	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.0%	2	0.0%	0
Asda, Robroyston	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Stirling	0.4%	2	0.9%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrisons, Perth	0.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	20.0%	4	0.0%	0
Small Shops, Alloa	0.3%	2	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Perth	3.6%	18	0.0%	0	0.6%	1	0.6%	1	0.0%	0	40.0%	8	40.0%	9
Tesco, Dundee	0.3%	2	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, Falkirk	0.1%	1	0.0%	0	0.0%	0	0.6%	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	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	0.0%	0
Weighted base:	500	166		122		126		44		20		22		
Sample:	500	108		177		175		20		10		10		

	Total	FK9 4	FK15 0	FK15 9	FK16 6	PH41	PH5 2							
Q16 Which one store do you use for most of your top up food shopping?														
<i>Only answered by those who stated they do top-up food shopping at Q14</i>														
Aldi, Stirling	0.7%	3	0.0%	0	0.6%	1	0.0%	0	7.7%	2	0.0%	0	0.0%	0
Co-op, Auchterarder	1.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	4	0.0%	0
Co-op, Bridge of Allan	17.6%	71	48.9%	66	0.6%	1	3.4%	4	0.0%	0	0.0%	0	0.0%	0
Co-op, Callander	0.6%	2	0.0%	0	0.0%	0	0.0%	0	7.7%	2	0.0%	0	0.0%	0
Co-op, Crieff (aka Somerfield, Crieff)	4.8%	19	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	88.9%	18
Lidl, Stirling	0.4%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
→ Marks and Spencer, Dunblane	12.3%	49	6.8%	9	18.5%	20	17.2%	18	7.7%	2	0.0%	0	0.0%	0
Morrison's, Stirling (aka Sprinkense Retail Park)	2.2%	9	1.1%	2	1.3%	1	1.4%	1	15.4%	4	0.0%	0	0.0%	0
Sainsbury's, Stirling (aka Raploch)	2.1%	8	4.5%	6	0.6%	1	1.4%	1	0.0%	0	0.0%	0	0.0%	0
→ Tesco Metro, Callander	0.4%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Metro, Dunblane	34.6%	138	1.1%	2	58.0%	63	62.8%	65	30.8%	9	0.0%	0	0.0%	0
Tesco Metro, Stirling	2.8%	11	5.7%	8	0.6%	1	0.7%	1	7.7%	2	0.0%	0	0.0%	0
Tesco Extra, Alloa	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small Shops, Auchterarder	0.2%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Small Shops, Bridge of Allan	6.2%	25	18.2%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small Shops, Callander	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Small Shops, Crieff	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
→ Small Shops, Doune	1.1%	4	0.0%	0	0.0%	0	0.0%	0	15.4%	4	0.0%	0	0.0%	0
→ Small Shops, Dunblane	6.4%	25	2.3%	3	13.4%	14	7.6%	8	0.0%	0	0.0%	0	0.0%	0
Small Shops, Stirling	1.2%	5	3.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / Home Delivery	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Aberdeen	0.2%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Cumbernauld	0.2%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Marks And Spencer, Stirling	0.2%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
→ Small Shops, Braco	1.6%	6	0.0%	0	2.5%	3	3.4%	4	0.0%	0	0.0%	0	0.0%	0
Small Shops, Muthill	0.5%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	2
Other (Don't know / varies)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:	400	136	108	104	29	4	20							
Sample:	414	88	157	145	13	2	9							

Ratio of spending: main food/ top up shopping

Q9 Main spend per trip on main food shopping: £70.3 mean of sample responses

Q21 Top up shopping: £16.7 mean of sample responses

Ratio: 80/20

Q14 In addition to your main food shop, do you normally do top-up food shopping?														
Yes	80.1%	400	81.5%	136	88.7%	108	82.9%	104	65.0%	29	20.0%	4	90.0%	20
→ No	19.9%	100	18.5%	31	11.3%	14	17.1%	22	35.0%	16	80.0%	16	10.0%	2
Weighted base:		500	166	122	126	44	20	22						
Sample:		500	108	177	175	20	10	10						

	FK 15-0	FK15-9	FK 16-6	FK 9-4	PH 4-1	PH 5-2	Total
Main food shopping <i>In primary catchment area</i>	From primary catchment area			From secondary catchment			
M&S	3	9		11			23
Tesco	66	70	18	2	2	0	158
Doone							
Dunblane other shops	3						3
Total catchment	72	79	18	13	2	0	184
Weighted total	122	126	44	166	20	22	500
% made in catchment	59%	63%	41%	8%	10%	0%	
% Combined retained		58%					
% inflows from secondary catchment		5%					
Weighted base total 500							

	FK 15-0	FK15-9	FK 16-6	FK 9-4	PH 4-1	PH 5-2	Total
Top up food shopping <i>In primary catchment area</i>	From primary catchment area			From secondary catchment			
M&S	20	18	2	9			49
Tesco	63	65	9	2			139
Doone			4				4
Dunblane other shops	14	8		3			25
Braco	3	4					7
Muthill						2	2
Total catchment	100	95	15	14		2	226
Weighted total	108	104	29	136	4	20	401
Add: don't do top up	14	22	16	31	16	2	101
Less: don't know	-3	-1	-2	-6			-12
Weighted total less deductions	119	125	43	161	20	22	490
% made in catchment	84%	76%	35%	9%	0%	9%	
% Combined retained		73%					
% inflows from secondary catchment		5%					
Weighted base total							

Combined main food and top up shopping

Assumed weighting of value of main food/ top up: 80:20 from NEMS survey findings on expenditure on each category
Retained expenditure **60.9%**
Inflows **5.1%**

Market shares of stores (% of primary and secondary catchment spend)

		48.0	£million
Tesco	31.0%		14.9
M&S	5.7%		2.7
Dunblane other shops	1.5%		0.7
Doone	0.2%		0.1
Braco	0.3%		0.1
	38.6%		18.5
Total	38.6%		18.6