Dundee City Council

Dundee Retail Study 2015

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Executive Summary

1. The purpose of the research is to inform preparation of the next Dundee Local Development Plan (LDP2) on key issues relating to retailing and town centres. In Dundee, this covers the network of centres with a focus on the City Centre, the five District Centres and the Commercial Centres (retail parks).

2. Existing planning policies seek to protect the vitality and viability of the town centres and include restrictions on the range of goods that are sold in the retail parks, together with a general presumption against out of centre retail development.

3. A household telephone interview survey covering Dundee and Angus was applied to determine shopping patterns and the public's use and perceptions of the City Centre and the District Centres.

4. Dundee has a primary and secondary catchment population of some 439,500, covering Dundee, Angus, parts of Perth & Kinross and East Fife. It is projected to rise to 465,000 by 2026.

5. National trends in retailing affect Dundee, and these include the effects of rising internet retail spending and the increasing concentration of major retailer demand to be located in cities, rather than in regional towns. The growth in supermarket development has virtually halted, with the market now focussed on the provision of small convenience stores, plus discount stores such as Lidl and Aldi. 'Value' retailing, such as Home Bargains, B&M and Poundland is growing in importance.

6. The leisure sector is a key diversifier for many retail locations and the arrival of the V&A will greatly enhance the role of Dundee as a 'destination' for leisure and shopping.

7. The core pitch in the City Centre includes the Overgate Centre, Wellgate Centre, linked by the Murraygate and High Street. The City Centre has about 87,000 sq m gross of comparison and convenience retail floorspace. There is a further 41,600 sq m gross of non-retail services. The vacancy rate in the City Centre is 17%, which is higher than the Scottish average of 10.6% for town centres. Vacant floorspace in the City Centre has increased in recent years.

8. While there is no known list of multiple retailers with immediate requirements to locate in the City Centre, this is common with many other cities, where the market lags behind forecast growth in comparison retail expenditure in the cycle of demand and investment. Prime retail rents in the City Centre are about £100 per sq ft, which ranks Dundee at 8th place among rentals in other town centres/ malls in Scotland.

9. The five District Centres have a total of 37,300 sq m gross of retail floorspace plus 20,000 sq m gross of non-retail services. Vacant floorspace has decreased in the District Centres. Retail warehouses and supermarkets comprise a substantial 68,200 sq m of comparison retail floorspace and 70,200 sq m of convenience floorspace. Corner shops add another 47,400 sq m of retail floorspace.

10. The findings of the household survey revealed that shopping is the predominant reason for visiting the City Centre and the main 'likes' were the range and choice of shops and being close to home. There were few specific 'dislikes'. When asked what improvements would make them visit more often, better shops and parking was mentioned, but a very substantial proportion indicated nothing in particular. Most respondents rated the shops as 'good' or 'average', as with the town centre environment. Parking availability did not feature quite so well High proportions rated the City Centre as a pleasant place to visit.

11. On the evening economy, high proportions of the respondents reported never visiting the City Centre in the evenings. Those who did visit, undertook a variety of activities.

12. Respondents from Dundee were also asked to rate their most-used District Centre. In general, Broughty Ferry and Perth Road came out with the best ratings, except for parking.

13. The household survey indicated that use of the internet for comparison shopping was higher than the average, with a significant proportion intending to increase their use of the internet for shopping.

14. A health check was undertaken on the City Centre, with a summary SWOT analysis. Among the strengths were Dundee's role as a regional centre and its strong retail offer and low retail expenditure leakage from the catchment. The main weaknesses included the slowness of retailer demand to materialise and the higher than average vacancy rate. Main opportunities include the V&A and the Waterfront proposals and proposals to expand the Overgate. The main threats include internet expenditure, failure to improve the retail offer/ capitalise on the Waterfront and any failure to control out of centre retail development.

15. The District centres were also subject to a more summary health check and in general, there few major issues but continued investment and improvement is needed to maintain their vitality and viability. The Commercial Centres (which are subject to range-of- goods restrictions) enjoy high occupancy and are trading well.

16. Forecasts of spare convenience and comparison retail expenditure capacity in Dundee for 2015-21 and 2015-26 are contained in this study, with all values in constant 2014 prices. The approach takes account of the expenditure potential of the residents of Dundee, plus inflows from the wider catchment and visitors, less outflows of expenditure by Dundee residents to centres elsewhere. A range of forecast capacity is provided, between '*low*' and '*high*'.

17. **Forecast convenience capacity-** the current convenience expenditure potential of the residents of Dundee is £324 million, growing to £364 million by 2026. The current convenience turnover in Dundee is £494 million, rising to £550 million by 2026. Leakage to other centres outside Dundee is only 5%.

18. After deducting the existing convenience retail consents (relatively minor), the low forecast expenditure capacity for 2015-26 is up to about £76 million. It equates to some 6,700 sq m net of supermarket floorspace. The high forecast is up to £81 million by 2026, assuming very limited potential to claw back leakage and increase inflows to Dundee, as the current market is orientated to smaller store developments. It equates to about 7,100 sq m net of supermarket floorspace by 2026.

19. The implications are that there would be support for additional medium/ small convenience stores up to around 1,300 sq m net and small store developments up to around 300 sq m net, also including extensions to existing supermarkets, for example.

20. **Forecast comparison capacity-** the current comparison expenditure potential of the residents of Dundee is £384 million, growing to £540 million by 2026. The current comparison turnover in Dundee is £723 million, rising to £978 million by 2026. Leakage to other centres outside Dundee is low at 5%.

21. After deducting the existing comparison retail consents, including the proposed Overgate extension and others, the low forecast expenditure capacity for 2015-26 is up to about £130 million. It equates to some 15,100 sq m net of city centre related comparison floorspace. The high forecast is up to £205 million by 2026, assuming potential to claw back leakage and increase inflows to Dundee. It equates to about 19,500 sq m net of supermarket floorspace by 2026.

22. The implications are that the forecast spare comparison expenditure capacity in Dundee is supportive of the existing comparison retail commitments. The potential to support additional comparison floorspace requires to be directed to opportunities within the network of centres and the associated policy restrictions on out of centre developments and ranges of goods that can be sold in retail parks. Failure to achieve this risks weakening the established centres which would be counterproductive.

23. **Policy implications**- the forecasts of spare convenience and comparison expenditure capacity should be directed to supporting the existing network of centres. The existing policy assumptions against out of centre retail development and the associated restrictions on the range of goods to be sold in the Commercial Centres needs to be applied rigorously. Failure to achieve this risks weakening the established centres, which would be counterproductive.

24. Small scale, specialist retailing and also small, distinctive restaurants and cafés would have potential to add to the visitor experience associated with arrival of the V&A, thus reinforcing the Waterfront as a 'destination'. However, some of these types of operator may be unlikely to afford this location and intervention may be needed to attract them.

25. Otherwise, the research does not identify the need for any major changes to the existing planning policies. The principal advice is to strongly apply the restrictions on out of centre development proposals in order to maintain and strengthen the vitality and viability of the established centres.

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1 Introduction

1.1 Study brief

1.1.1 **Roderick MacLean Associates Ltd**, in association with **Ryden** was commissioned by Dundee City Council in July 2015 to prepare this study.

1.1.2 The purpose of the research is to inform preparation of the next Dundee Local Development Plan (LDP2) on key issues relating to retailing and town centres. In Dundee, the main shopping centres include the City Centre, the five District Centres and the three commercial centres (retail parks). Other shops include the major out of centre superstores and a network of local shops.

1.2 Objectives

1.2.1 The study sets out the profile of Dundee City Centre and the five District Centres. The brief requires identification of trends, challenges, strengths and opportunities to inform future town centre and retail policies. The objectives fall into three categories: *policy review, data analysis* and *identification of challenges, strengths and opportunities.*

1.3 Study scope and content

1.3.1 The study requires addressing the following issues from the brief:

1.3.2 **Analysis of policy and emerging policy-** to provide a concise review of the existing town centre and shopping policies in Dundee against national trends, commercial pressures and the SPP to inform the forthcoming MIR (2016) for the next Dundee LDP and future policy development for that Plan. The study includes reference to the current TAYplan, the recent Proposed TAYplan2, the External Town Centre Review Group report and associated relevant research.

1.3.3 **Analysis of national, regional and local trends-** the brief requires the following to be assessed:

- Trends in retailing, including online shopping, retail property requirements and any specific information on Dundee;
- Trends in public perceptions and attitudes to the town centres; and
- Footfall trends in the City Centre and in the District Centres.

1.3.4 **Qualitative assessment**

- Review data sources on the town centres held by the Council and identify gaps in information;
- The brief requires a summary of the comparison retail floorspace, non-retail floorspace and vacancies in the City Centre and the District Centres. This report also includes the convenience retail floorspace;
- Provide a qualitative assessment of Dundee's main shopping centres - City Centre, District Centre, and other major out of centre shopping facilities (includes the retail parks). The report includes health check information and assessment of retail market demand. A holistic approach to assessment of the town centres is adopted in accordance with the brief, without focussing exclusively on retailing;
- Consider the future of these centres and measures to promote their attraction and competitiveness;

1.3.5 **Retail Capacity Study**

- Provide a quantitative statistical analysis of retail floorspace requirements for the period 2015-26. This report contains forecasts of convenience and comparison retail expenditure capacity for 2015-21 and 2021-26, together with the indicative equivalent retail floorspace;
- Advise on how any identified floorspace requirements can be accommodated without adversely affecting the vitality and viability of the City Centre and District Centres;

1.3.6 **Specialist topic advice**

- Review the current restrictions on the range of goods applying to the retail parks and other out of centre locations and advise on the need for any adjustment; and

- Assess the potential future demand for small scale special retailing within the Central Waterfront.

1.3.7 **Household survey**

1.3.8 A household telephone interview survey (1,000 sample) was conducted by NEMS Market Research in Dundee and Angus to provide information on shopping patterns and use and perceptions of the City Centre and the five District Centres in Dundee.

1.4 Outcome

1.4.1 The study aims to inform the City Council on the issue covered to assist preparation of the Dundee LDP 2. The outputs will provide a basis for reviewing the roles of the various centres within the network of centres and the extent to which new opportunities could be developed, including indication where changes in the defined centres would be desirable.

2 Dundee catchment and population

2.1 Introduction

2.1.1 This section shows the extent of the primary and secondary retail catchment areas of Dundee, together with their populations.

2.2 Catchment definition by local authority area

2.2.1 The household interview survey in Dundee and Angus commissioned for this study, together with similar surveys supporting the current local authority retail studies in Fife and Perth & Kinross reveal the extent of the primary and secondary retail catchment areas of the City Centre and the retail parks, based on comparison (non-food) shopping patterns. Map 2.1 illustrates the extent of the Dundee catchments.

2.2.2 Definition of the primary and secondary catchment areas of Dundee (or any town) relates to its market share in the surrounding areas. Thus the primary catchment includes those areas where Dundee accounts for the great majority of the market share of the catchment expenditure. The secondary catchment includes areas where Dundee draws a significant level of expenditure, but its market share is much lower, well below 50% for example.

2.2.3 **Primary catchment-** information from the household interview survey indicates that 95% of respondents from Dundee do their comparison shopping in Dundee, of which 68% is in the City Centre, as shown in Table 9.3. Among respondents from Angus, 72% do their comparison shopping in Dundee, of which 60% is in the City Centre. The calculation of these market shares is shown in Appendix 8. Therefore it is reasonable to define the Dundee and Angus Council areas as the primary catchment.

2.2.4 **Secondary catchment-** the Perth & Kinross Retail Study 2014 divides the Council area into five zones. Comparison shopping patterns from two of these zones (Perth City) and Strathmore (Blairgowrie and Coupar Angus) relate significantly to Dundee. Some 23% of comparison expenditure from these zones combined goes to Dundee, based on the NEMS household survey in 2014 which underpins the Perth & Kinross Retail Study. Appendix 10 shows the calculation of the market share. Very little expenditure was drawn to Dundee from elsewhere in Perth & Kinross.

2.2.5 The Fife Retail Capacity Study 2014 indicates that 65% of comparison retail expenditure by residents of East Fife is made outside that area, of which it is deduced that 41% is made in Dundee, based on adjusted proportions from the 2009 NEMS household interview survey which underpins the Fife Study. Appendix 11 shows the calculation of this market share. Levels of comparison retail expenditure in Dundee from the rest of Fife were negligible.

2.2.6 Accordingly, it is appropriate to define these areas in Fife and Perth & Kinross as the secondary catchment area of Dundee based on local authority areas, while recognising that areas including Tayport and Newport, would be considered within the primary catchment defined on the basis of travel time. This difference is unimportant for the Dundee Retail Study, where the objective is to include the expenditure drawn to Dundee from East Fife.

2.2.7 The primary and secondary catchment areas combined are broadly similar to the total survey area defined in the *Dundee City Region Retail Study* in 2006.

2.3 Population

2.3.1 Table 2.1 shows the current and projected populations of the primary and secondary catchment areas up to 2026. The projections are based on the Registrar General's 2012 based population projections.

Table 2.1
Dundee - primary and secondary retail catchment area populations

	2011 Census	2015	2021	2026
Primary catchment				
Dundee City Council area	147,268	149,606	155,182	160,404
Angus Council area	115,978	116,275	116,705	116,827
Sub total	263,246	265,881	271,887	277,231
Secondary catchment				
Perth & Kinross- part				
Perth- City & hinterland	83,783	86,485	91,313	95,623
Strathmore & the Glens- Blairgowrie & Coupar Angus	19,175	19,793	20,898	21,885
East Fife	66,476	67,330	68,966	70,304
Sub total	169,434	173,608	181,178	187,812
Total	432,680	439,489	453,065	465,043

Note

Source 2011 Census with the Register General's 2012 based population projections applied

Perth-City & hinterland is from Zone 1 in the Perth & Kinross Retail Study 2014

Strathmore & the Glens- Blairgowrie & Coupar Angus is from Zone 5 in the Perth & Kinross Retail Study 2014

The RG population projections for Perth & Kinross are applied to the above parts.

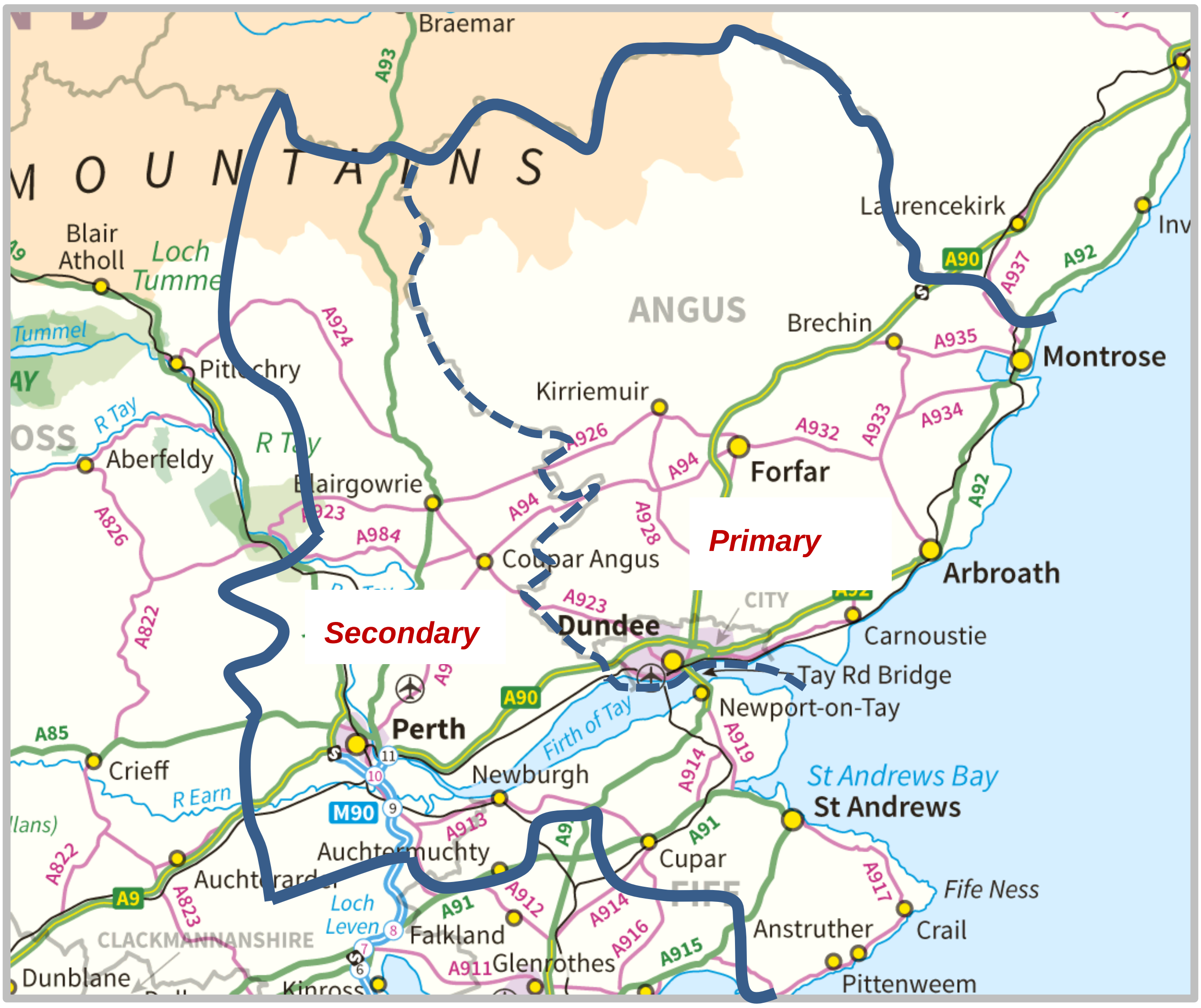
Perth & Kinross Council area	*146,652*	*151,382*	*159,833*	*167,377*

East Fife is derived from the catchment area defined in the *Fife Retail Capacity Study 2014*

The RG population projections for Fife are applied to East Fife.

Fife	*365,189*	*369,879*	*378,867*	*386,216*

Map 2.1 Dundee primary and secondary catchment areas by local authority area



Mapbase: Ordnance Survey

3 Town centre and retail planning policies

3.1 Introduction

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

3.2 Scottish Planning Policy

3.2.1 The most recent version of the SPP was published in June 2014. The main change in emphasis compared to the 2010 version of the SPP is the greater focus on encouraging the diversity of uses and vitality within town centres generally, alongside support for improvement to the quality of the centres as places to live and work.

3.2.2 Preparation of the 2014 SPP was undertaken in parallel with the External Advisory Group's Report to the Scottish Government entitled *Community and Enterprise in Scotland's Town Centres,* published in June 2013. This document sets out a 'town centres first' principle, where the health of town centres is given central focus.

3.2.3 The 'town centres first' policy is promoted in the 2014 SPP, when planning for uses which attract significant numbers of people, including retail, commercial and leisure uses, offices, community and cultural facilities. Plans should identify a network of centres (city centres, town centres, local centres and commercial centres), explaining how they interrelate. For commercial centres, the function should be specified to protect town centres. Health checks of town centres should be undertaken regularly to assess their vitality and viability and strengths/ weaknesses. These checks should be used to develop town centre strategies.

3.2.4 Development plans should adopt the sequential approach to preferred locations for uses which generate significant footfall, including retailing and other uses, in the following order of preference:

- Town centres
- Edge of town centres
- Other commercial centres
- Out of centre locations that are readily accessible by a choice of transport.

3.2.5 All parties are advised to be realistic and flexible in applying the sequential test. New development in a town centre should contribute to diversity and be of a scale appropriate to that centre. A retail impact analysis is required for retail and leisure developments over 2,500 sq m gross which are contrary to the development plan. For smaller developments which affect vitality and viability, an impact analysis may also be required.

3.2.6 Out of centre locations should only be considered where the town centre/ edge of centre and commercial centre options are unavailable or do not exist, together with meeting other criteria specified in the SPP.

3.2.7 Annex A to the SPP contains a list of health check indicators to be applied to town centres, together with guidance on preparing town centre strategies.

3.3 Current TAYplan

3.3.1 The current TAYplan was approved in June 2012, for the period 2012-32. On town centres, the document briefly summarises the aims of the 2010 SPP, including the sequential test. As a strategic plan, the focus is on identification of the hierarchy of centres, and the TAYplan aims to focus the majority of development in the largest settlements. It adopts a three tier spatial strategy.

3.3.2 Under *Policy 7* of the TAYplan, comparison retail development is to be focussed on the network of centres identified in Table 2 of the Plan, which sets out the hierarchy of centres, with the largest scale of activity in the largest centres. Dundee City Centre is top of the hierarchy.

- **Regional Centre**- Dundee City Centre
- **Sub- Regional Centre**- Perth City Centre
- **Larger Town Centres**- Arbroath, Cupar, Forfar, Montrose, St Andrews
- **Smaller Town** Centres- 14 town centres

- **Commercial Centres**- Kingsway East RP, Kingsway West RP, Gallagher Retail Park and St Catherine's Retail Park in Perth.

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

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

3.4 Emerging TAYplan 2

3.4.1 The Proposed TAYplan Strategic Development Plan for 2016-36 was published in May 2015 for public consultation extending up to early July 2015. It is proposed to submit the Proposed SDP to the Scottish Ministers by June 2016. Following a period of public examination, it is anticipated that the replacement TAYplan will be approved by the Scottish Ministers by December 2016.

3.4.2 In the Proposed TAYplan, there is a principal settlement hierarchy, which identifies locational priorities for the majority of new development. The Dundee Core Area is identified as a Tier 1 level in the hierarchy under *Proposed Policy 1*. Under *Proposed Policy 2*, there is an emphasis on creating better quality, more distinctive places to live and work. *Proposed Policy 3* identifies a number of strategic investment areas, including the Dundee Waterfront (mixed uses including retail, commercial, leisure and others), plus employment land at Linlathen, the Western Gateway and at the James Hutton Institute site.

3.4.3 *Proposed Policy 5* promotes the 'town centres first' to enhance the vitality, viability and vibrancy of the City/ Town Centres. It largely reiterates the policies in the SPP, with the City/Town centres as the priority locations in the network of centres for retail development, commercial leisure, visitor uses, and hospitality, catering and residential development.

3.4.4 Where these uses cannot be accommodated in the City/Town Centres, the commercial centres in Dundee can be considered for bulky goods and convenience retailing and also for commercial leisure.

3.4.5 *Proposed Policy 5* is directly relevant to the current Dundee Retail Study, which includes both a qualitative review of the centres and an assessment of the potential quantitative retail floorspace requirements with advice on location.

3.5 Dundee Local Development Plan 2014

3.5.1 The current LDP (adopted in December 2013) promotes the City Centre as the first choice for new shopping provision in the City and further development of Dundee's regional shopping role. Progression of the Waterfront development and the V&A need to integrate with the City Centre to strengthen its shopper and visitor appeal. Map 3.1 illustrates the City Centre boundary and the Core Retail Areas.

3.5.2 In Dundee, the five District Centres are also defined as 'town centres'. These include *Albert Street* , *Broughty Ferry, Hilltown, Lochee* and *Perth Road*, as shown on Map 3.2. The City Centre and the District Centres is supported by a network of smaller centres and by the commercial centres comprising the three retail parks in Dundee.

3.5.3 *Policy 20* seeks to protect the City Centre Retail Frontage Area from change to other uses from Class 1. In the Speciality and Non-frontage Area, support is given to Class1/2/3 uses only in ground floor premises. Extending and upgrading the City Centre shopping provision is supported under the policy to include extension to the Overgate Centre and extension/upgrading of the Wellgate Centre. Provision for small scale shopping in the Waterfront Masterplan is supported, provided it is complementary to the City Centre retail offer.

3.5.4 *Policy 21* seeks to protect the Retail Frontage Areas within the District Centres for Class1/2/3 uses, to ensure the Centres continue to function effectively to service the surrounding suburban communities. Development proposals outside the frontages, which also enhance the vitality and viability of the Centres, will be supported.

3.5.5 *Policy 22* promotes mixed use development of the former Stack Leisure Park to include housing retail and leisure, which complements the adjacent Lochee District Centre- all within the Lochee Development Framework. To date, the site is partly redeveloped with retail and leisure operators represented (see section 4.11).

3.5.6 *Policy 23* provided restrictions on the range of goods that apply to the retail parks, in order to protect the City Centre and the District Centres from potential threats to their vitality and viability. The retail parks at Kingsway East and West are for bulky household goods and at Gallagher Retail Park, the range of goods is orientated towards mainly personal goods, to complement the City Centre retail offer.

3.5.7 Also under *Policy 23*, there are restrictions imposed on supermarket/ superstore development proposals which restrict floorspace for the sale of comparison goods to no more than 30% of the total net floorspace. An additional related restriction limits floorspace for a single group of comparison goods to no more than 50% of the total comparison floorspace.

3.5.8 Review of the existing restrictions on the range of goods under *Policy 23* forms part of the Dundee Retail Study.

3.5.9 *Policy 24* sets out the criteria for the location of new retail development proposals under the sequential test.

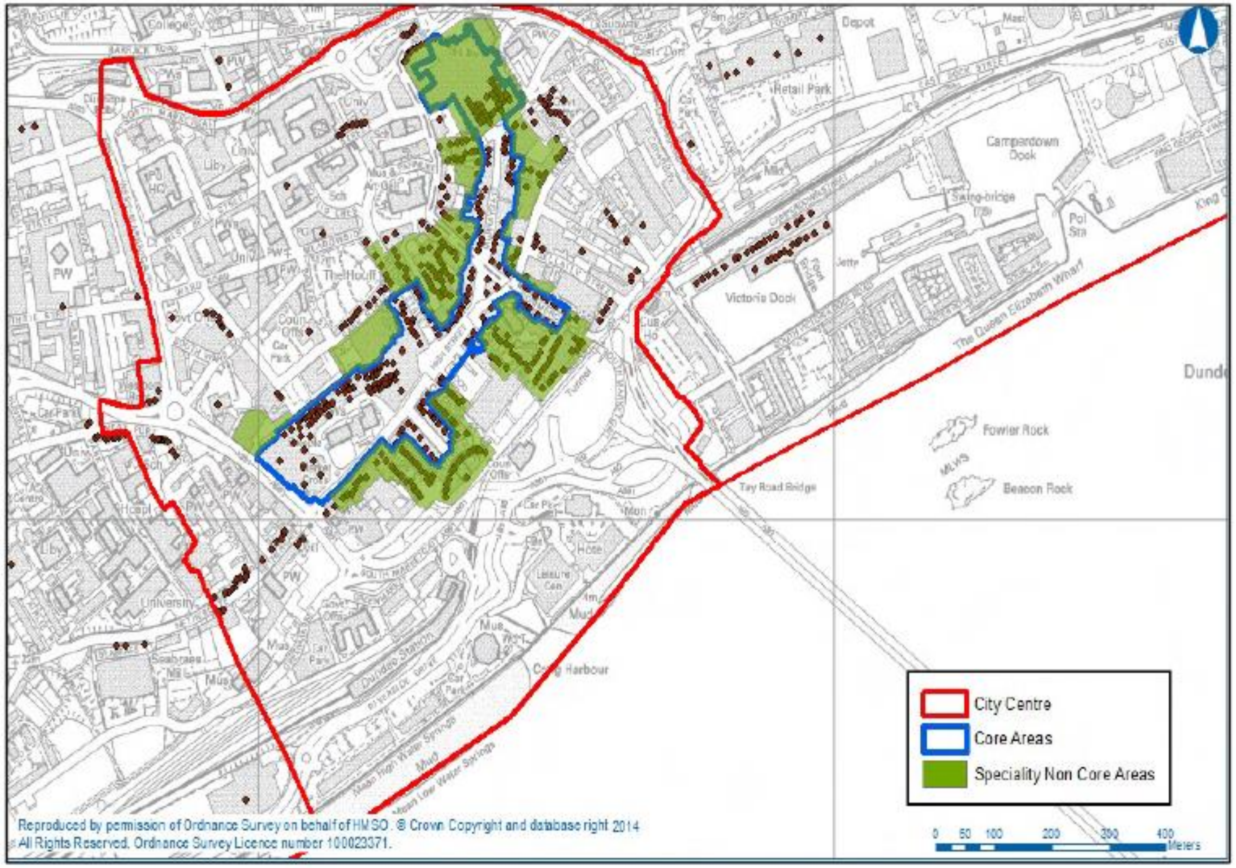
3.5.10 Under *Policy 25*, support is given to redevelopment of the Dock Street Bus Depot (adjacent to Gallagher Retail Park) for bulky household goods. This redevelopment opportunity will not be authorised until there is evidence of development at the Stack, and provision is made for relocation of the bus station to an appropriate site.

3.5.11 Finally, under *Policy 26*, where it can be demonstrated that an area has low local retail provision, together with a proven need, support will be given to development of a new local shop of up to 250 sq m gross. Among the existing local centres/ shop parades, measures to upgrade the shops will be supported, together with provision of additional retail floorspace up to 500 sq m gross where appropriate.

3.6 Dundee Local Development Plan 2

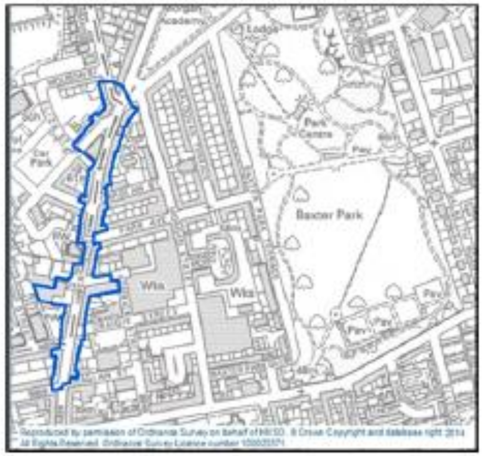
3.6.1 The Dundee Local Development Plan Scheme 2015 (approved in February 2015) sets out the schedule for replacing the current LDP. Publication of the MIR for consultation is intended for early 2016, with publication of the Proposed LDP 2 at the end of that year, after completion of the consultation process and other assessments. Submission of the Proposed LDP to the Scottish Ministers is expected by December 2017, with adoption by December 2018, following examination and representations. The Dundee Retail Study will assist by informing preparation of the MIR and the Proposed Plan.

Map 3.1 Dundee City Centre, showing core retail areas and speciality, non-core frontage areas



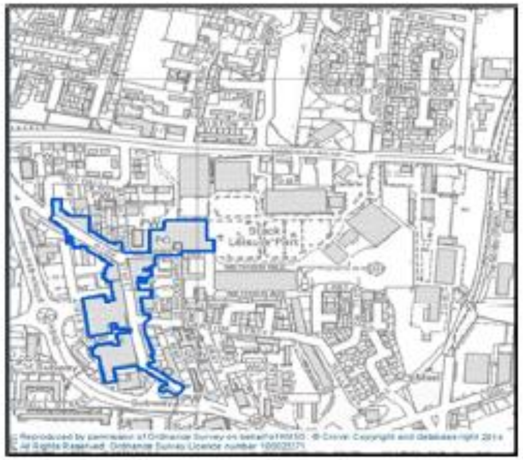
Extract from Dundee Retail Booklet 2014

Map 3.2 Dundee District Centres

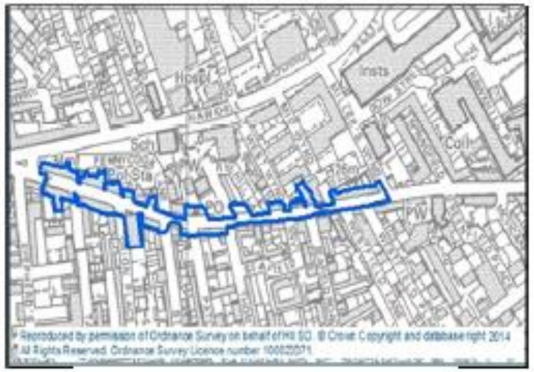


Albert Street

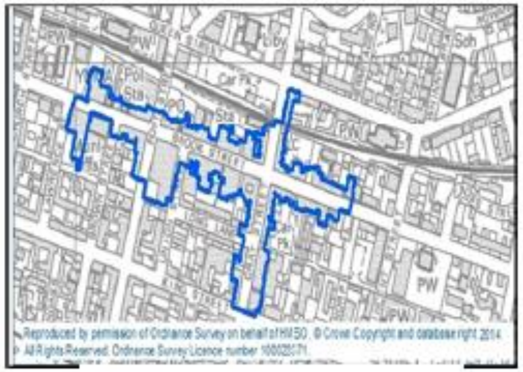
Hilltown



Lochee



Perth Road



Broughty Ferry

Extract from Dundee Retail Booklet 2014

4 Retail market trends and Dundee overview

4.1 Introduction

4.1.1 This section explains the overall trends in retailing, including the relationship between the scale of centres and retail market demand, the effects of online shopping and the importance of the retail/ leisure offer to generating maximum shopper attraction.

4.1.2 It also shows trends in retail and non-retail floorspace in the City Centre and the District Centres and an appraisal of retail market demand in Dundee, with consideration of longer term market issues.

4.2 The economy

4.2.1 Scottish economic growth in 2014 was 2.7% compared to 1.6% in 2013. Forecast growth in 2016 and 2017 is lower at 2.3% for each year, with the recovery predicted to continue (source: *Fraser of Allander Institute*, *Economic Commentary 2015*).

4.3 Retail spending

4.3.1 The National Statistics for Scotland reveal that the volume of retail sales in Scotland increased by 2.4% over the year ending in the second quarter of 2015, but the value of the sales did not increase over the year (0%). The equivalent GB retail sales growth was 4.4% and 1.3% for the same periods.

4.3.2 Looking to the future, Experian forecast an average growth rate of 0.6% per annum in volume for convenience retail expenditure and 3.3% per annum for comparison expenditure for the UK for 2015-25 (2.4% for all retail sales by volume). These forecasts reveal expectations of continuing growth in retail sales.

4.4 Internet shopping and the High Street

4.4.1 Online retailing is a special form of trading (SFT) which tends to reduce the need for traditional shop floorspace overall, but the relationship is not direct or simple. Internet retail sales are a mix of purely online sales (not sourced from shops) and also store based online sales, such as grocery delivery sales and click and collect. The precise split is unknown, but Experian estimate that 70% of SFT convenience sales and 25% of SFT comparison sales relate to retail floorspace.

4.4.2 E-tailing continues to expand and it is forecast to take an increasing market share. Multi channelling by retailers is common, with both web based sales and in-store sales. The challenge varies, depending on the product, but entertainment items such as books, DVDs and video games have proved extremely popular to buy online. Progressive retailers such as John Lewis Partnership and Argos have moved to a multi-channel model where a physical store can operate successfully alongside a website.

4.4.3 [1]Experian, for example, predict that the proportion of SFT (mainly internet spending) on comparison goods will rise from 16.6% in 2015 to 21.1% in the UK by 2026, before applying the adjustments mentioned in the previous paragraph. In this Study, the proportions are actually higher for Dundee and Angus, based on the household survey findings.

4.4.4 Internet shopping has contributed to the reduction in demand for retail floorspace in the High Street in all but the major Cities and the largest shopping malls. Most of the reduction in demand has been driven by trends in multiple retailer demand. Experian define *multiples* as operators which have a network of 9 or more outlets.

4.5 Concentration of demand in the largest centres

4.5.1 The long run trend in the retail sector is concentration of multiple retailer market activity into the largest centres. More affluent and mobile shoppers seek a wider choice of goods and services, as discretionary expenditure grows faster than spending on staple goods such as groceries. This widening range of goods and services is provided in

[1] Experian Retail Planner- Briefing Note 12.2 -2014

larger destinations, such as Dundee, and at purpose-built regional shopping malls which in Scotland are in the Central Belt (Braehead for example). These locations attract a virtuous circle of retailer/ services and developers/ investors[2]. This refers to the fact that many retailers require fewer, larger branches than they operated in the past, as customers will travel further to patronise a wider range of goods and services. Developers and investors are responding to this trend by creating new retail and leisure floorspace in the largest cities only. This trend is self-reinforcing as that new floorspace further improves the market position of those cities relative to smaller centres.

4.5.2 In broad terms a city such as Dundee should be largely self-contained for both comparison and convenience shopping. Evidence from the household survey indicates that few shoppers from the Dundee catchment shop elsewhere. Thus, the location of Dundee, and its role as a regional shopping centre, means that it functions in a similar way within its catchment to the largest city centres in Scotland, albeit on a smaller scale.

4.5.3 There is a growing gap between the major destinations and traditional town centres, often reflected in the latter by high vacancy rates, falling rents and very limited new demand for retail uses. Disinvestment by retailers in the aftermath of the 2008/09 recession has increased this market polarization.

4.5.4 It is notable that new retail development of any scale in Scotland is firmly focused upon these major destinations: Braehead (near Glasgow), Silverburn (Glasgow), Union Square (Aberdeen), St James Centre (Edinburgh) and Dundee's Overgate Centre. In many large towns, such as Ayr, Clydebank and Falkirk, the trend is for discounted sales of existing shopping malls rather than new development.

4.5.5 Luxury retailers in prime locations have fared well. Retailers based principally in Glasgow's Buchanan Street and connected pitches such as Ingram Street, plus Edinburgh's George Street and Aberdeen's Union Square, have shown high demand and strong growth.

4.6 Value retailing

4.6.1 At the other end of the scale, value retailers such as *Poundland* and *B&M* stores have found a place in the market to cater for everyday goods at low prices which is attractive to squeezed household budgets. The strong growth of *Aldi* and *Lidl* in the convenience goods sector also illustrates the market trend towards meeting consumer outlooks which favours value for money as a distinct market segment.

4.7 Supermarkets- trends

4.7.1 Trends in food shopping have changed. The growing market share captured by expanding superstores halted in 2013/14. Tesco has withdrawn from many planned sites and Wm Morrison is to close 11 stores (none of these in Scotland). Competition with town centres by superstores with a major comparison retail offer is not being maintained.

4.7.2 The convenience focus has instead turned to local convenience stores, including small, local stores run by the major operators, including Tesco, Sainsbury's. More recently, ASDA has entered this sector with intentions to develop small format convenience stores. These also compete mainly with Co-ops, SPARs, Costcutter and the like. These have replaced comparison goods uses in some prime and secondary retail pitches. However, market intelligence suggests that not all locations are working well for convenience stores.

4.8 Relationship with leisure and other services

4.8.1 Development of the Dundee Waterfront, including the V&A will promote Dundee as a 'destination' and has the opportunity to magnify the retail and other service expenditure in the City Centre.

4.8.2 The leisure sector is a key diversifier for many retailer locations. Leisure uses bring additional expenditure, broaden the customer experience; and in some locations

[2] Property Market Analysis (PMA) reports that since 1986 the UK's top 30 retail centres have on average gained 45% additional floorspace, while the remainder of the largest 200 centres have on average gained 25% floorspace.

are a useful way to fill vacant retail premises. Restaurants / bars and cafes can comfortably occupy prime retail pitches and in market terms - if not planning policy terms – can be interchangeable with ground floor units in town and city centre retail frontages.

4.8.3 Larger leisure formats such as hotels, cinemas and health clubs often form part of new development proposals and take urban sites, but their formats do not tend to be easily interchangeable with unit shops on retail pitches without either redevelopment or incorporation into upper floors.

4.8.4 Notably, analysis of live “retail” requirements across Scotland indicates that up to half of these can be leisure uses, rather than shops. The balance between retail and leisure demand varies substantially by location.

4.8.5 Retail services such as banks are uncertain occupiers of retail centres over the long term. Mobile delivery of banking and other services is removing the need to have extensive branch networks. Travel agents are an early example of this on-line migration, where there are now fewer operators occupying shop units. Personal services including beauty and healthcare are however increasing their presence in retail locations, although typically in less expensive, secondary locations.

4.9 City Centre retail

4.9.1 The core retail pitch extends from the Overgate Centre in the west, along the High Street and Murraygate and adjacent streets, to the Wellgate Centre in the east.

4.9.2 The two storey **Overgate Centre** contains comprises 70 retail units (39,000 sq m of floorspace) with two multi-storey car parks. Anchor retailers here are *Debenhams* and *Primark. O*ther retailers include *Superdrug, New Look, River Island, Argos, Next and Paperchase*. Recent store openings include *Vision Express, Holland & Barrett, Tiger and JD Sports*. In 2010 the Overgate Centre was sold to Land Securities Group for £141 million, representing a yield of close to 6.9 per cent; subsequently in 2014 it was sold to Legal & General Property for £125.3 million. Proposals to extend the Overgate Centre are referenced later in this report.

4.9.3 The three storey **Wellgate Centre** contains 31,590 sq.m of floorspace. It was refurbished in 2007. Retailers here include *BHS, B&M, Iceland, New Look, Brighthouse, The Works, Pavers and McDonalds*. The mix is more value-driven than the Overgate Centre. *Store Twenty One* opened here in 2014. In 2011 Invista Real Estate Management (on behalf of the St James Place Fund) purchased the centre from PRUPIM (on behalf of the M&G Property Fund) for £31.2 million, reflecting a net initial yield of 9%. There are plans for further redevelopment of the Centre which include a new entrance, a 900-seat 8-screen cinema to be operated by Light Cinemas, and the change of use of retail units on the third floor into food & drink (6,040 sq.m.).

4.9.4 The pedestrianised **High Street and Murraygate** link the two covered shopping malls. Retailers include *Marks & Spencer, Boots, H &M, O2, Schuh, The Body Shop and Deichmann*.

4.10 City Quay

4.10.1 **City Quay** is located at the former Victoria Quay on the waterfront at Camperdown Street close to the City Centre. The retail and office complex occupies listed former warehouses on the dock and lies adjacent to the Apex City Quay Hotel. Although predominantly occupied by offices, retail and leisure users include *Taza Indian Restaurant*, *Domino's Pizza, Porters Bar & Restaurant and Direct Golf*.

4.11 District Centres retail

4.11.1 The five **District Centres** contain a mix of shops and services which primarily serve their local suburban catchment areas. Developments at the adjoining **Stack Leisure Park** have given Lochee a wider attraction. The Stack has 7 units. TJ Morris (owner of the Home Bargains chain) purchased the Park out of administration in 2012. Following redevelopment *Home Bargains, The Range* and *Aldi* have opened, but the cinema remains vacant. *Sports Direct* has consent to develop a store and gym, with restrictions on the range of goods to be sold from the store.

4.12 Dundee retail parks

4.12.1 **Kingsway West Retail Park** lies to the north of the City on the ring road. It comprises 19 units and the list of retailers is shown in Table 9.6. Kingsway Tesco Extra is adjacent to the park. An application by *Next* to extend and refurbish its store into Scotland's first Next Home, garden and fashion store, was refused on the grounds that it posed a threat to the clothing/ footwear sales in town centres.

4.12.2 **Kingsway East Retail Park** lies at the eastern end of the city and the list of retailers include ASDA and the retail warehouse operators shown in Table 9.6. B&Q closed here in Spring 2015 and was replaced by a *B&M Home and Garden* store which opened in August 2015.

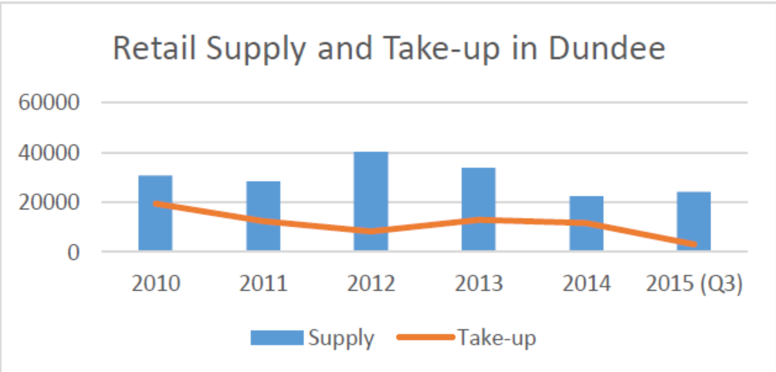
4.12.3 **Gallagher Retail Park** is located on the eastern edge of the City Centre. The list of operators is shown in Table 9.6. This retail park is designed to complement the City Centre retail offer, so it is subject restrictions on the range of goods that can be sold which exclude bulky goods.

4.13 Dundee supermarkets

4.13.1 The 'big four' operators (*ASDA/ Tesco/ Morrisons and Sainsbury's*) are present in Dundee, but there is no *Waitrose*. Discount operators Aldi and Lidl are represented, including recent increases. There are also a number of small format Tesco Express convenience stores, plus a Metro store in the City Centre.

4.14 Dundee retail market activity

4.14.1 The annual take-up of retail units in Dundee is shown in the graph below. The average take-up is 11,400 sq m (47 units) per annum for the years shown (Ryden/ Costar). In 2014, the take-up was 11,690 sq m relating to 53 transactions. The Scottish average annual retail take-up since 2010 is 242,439 sq.m. in 1,329 shops.



4.15 Current retailer demand to locate in Dundee

4.15.1 Table 4.1 shows the current retailer and non-retail service requirements to locate in Dundee by type of business, unit size and location within Dundee. Only three of the requirements are by retailers. Aldi's requirement for another store in Dundee has been met by the recent planning consent at Myrekirk Road, so has not been included. Otherwise, the great majority of the demand relates to non-retail services.

4.15.2 It is important to note that there is no known list of major multiple retailers with immediate requirements to locate in the City Centre, including at the malls or in relation to the proposed extension to the Overgate Centre (see section 9). In fact this situation is common in other cities, for example in Glasgow, as market demand for city centre and mall expansion opportunities lags behind property investment proposals and forecast growth in comparison expenditure. This does not mean that the demand will not materialise in the future, just that the cycle of demand is yet to return to an upward phase.

4.15.3 Looking in more detail at the take-up of retail properties, a list of selected lettings in Dundee during 2014 and 2015 to date is

Table 4.1
Current retailer and non-retail service requirements to locate in Dundee

Retailer	Location	Size range(sq.m.) from	to	Retail type
L'Occitane en Provence	City centre	37	93	Skin and body care
Phase Eight	Dundee	65	186	Ladies fashion
Farmfoods	District centres	557	929	Frozen food
Total		659	1,208	
Non-retail services				
La Favorita	City centre	75	140	Pizza takeaway and delivery
La Favorita	Broughty Ferry	75	140	Pizza takeaway and delivery
Costa Coffee	City centre	93	140	Coffee shop
Costa Coffee	City Quay	93	140	Coffee shop
Domino's	Camperdown	93	111	Pizza takeaway and delivery
Premier Inn	Dundee	-	-	Hotel (120 bedrooms)
Mcdonalds with Drive Thru lane	Dundee	-	-	Fast food restaurant
Marstons	Dundee (& suburbs)	580	882	Pub / restaurant
Papa John's Pizza	City centre	79	93	Pizza restaurant
Boozy Cow	City centre	186	279	Burger restaurant
Vets 4 Pets	Lochee	111	186	Veterinary surgery
Total		1,385	2,111	
Other				
Halfords		325	743	Autocentre
Aldi (requirement met)	Dundee south	-	-	Discount supermarket

Source: Ryden: September 2015

provided in Appendix 13. These confirm a wide spread of business types investing in the City including mainstream retailers, speciality retailers, leisure operators and retail services.

4.15.4 The City Centre has attracted a number of new restaurants recently. Store closures include *La Senza, Bank Fashion, WH Smith and Country Casuals*. B&Q at Kingsway East Retail Park has also closed

4.15.5 On the demand for retail parks generally in Scotland, Ryden consider that the market has started to pick up from previous years, which will also be relevant to Dundee.

4.15.6 Investment performance confirms confidence in the retail market. Notable recent retail property investment transactions in Dundee are listed in Appendix 14. The transactions indicate a three-tier market: for major shopping centres / commercial parks; prime unit shops/ commercial premises let to major occupiers; and secondary premises at much higher yields (reflecting much lower prices)

4.16 Retail Rents and commercial yields

4.16.1 The Ryden retail rent index measures Zone A retail rents in Scotland's top twenty shopping destinations. Based on this index, Dundee is in 8th place in Scotland in terms of performance. Retail rents have hardly changed over the last four years, but there have been significant underlying events

occurring in the market. These include changes in prime pitches with the city/ town centres, contraction in store numbers, diversification into leisure uses (often requiring new development) and buy-outs of shopping malls leading to cheaper, competitive rents to attract occupiers, together with the continuing concentration of multiple retailer demand to locate in the prime centres.

4.16.2 Prime retail rents in Dundee City Centre are around £100 per sq ft, compared to the following other major centres:

- *Glasgow City Centre* *£260*
- *Braehead* *£200*
- *Edinburgh City Centre* *£180*
- *Aberdeen City Centre* *£140*
- *Stirling* *£115*
- *Inverness* *£80*
- Perth £65

Source: Ryden

4.16.3 Commercial yields in the City Centre average around 7.2%.

4.17 City Centre and District Centres: floorspace trends

4.17.1 Table 4.2 shows the level and mix of retail and non-retail floorspace in the City Centre and in the District Centres, showing the changes recorded from 2009 to 2014. The table also shows vacant floorspace and changes in floorspace in the rest of Dundee. This information is based on annual surveys by the Council.

4.17.2 **City Centre-** the level of comparison floorspace has declined by 13% over the past five years, but convenience floorspace has increased by 10%, with no significant change in the level of non-retail service floorspace. The graph in Figure 4.1 shows that comparison retail floorspace accounts for over half the City Centre floorspace, which is consistent with its role as a regional shopping centre. Non-retail floorspace accounts for 27% and convenience floorspace represents 15% of the total.

4.17.3 Table 4.3 provides a breakdown of the non-retail floorspace into five broad types. It reveals that just over half the non-retail floorspace in the City Centre relates to the 'hospitality' sector, comprising restaurants, cafés, pubs and take-aways. The strong representation in this sector is essential to complement the retail offer and the City Centre's role as the regional shopping centre.

4.17.4 **District Centres-** Table 4.2 reveals that the levels of floorspace in the District Centres has mostly increased substantially over the last five years, with the main increases occurring recently in the level of comparison floorspace at Lochee (arrival of *The Range*) and at Hilltown, with the arrival of *Dundee Market Traders & Recylers* in a vacant unit. Perth Road District Centre has not experienced much change. Overall, the picture is very positive.

4.17.5 Figure 4.1 shows wide variety in the mix of retail and non- retail floorspace in the five District Centres. The high proportion of comparison floorspace in Broughty Ferry and Lochee is largely explained by the presence of *Gillies' Furniture* and *M&C Clothing* in the former and *The Range* in the latter.

4.17.6 At Albert Street and Perth Road, there are high proportions of convenience floorspace. Much of this is accounted for by the presence of the *Co-op* in the former, and the *Nisa Extra* supermarket in the latter.

4.17.7 The highest proportions of non-retail service floorspace occur at Perth Road, Hilltown and Albert Street. Figure 4.1 reveals that non-retail services are the largest component of floorspace in three out of five centres. It would probably be the largest component in the other two centres too, if it were not for the major comparison retailers represented.

4.17.8 **Other Dundee floorspace**- retail floorspace in corner shops has expanded over the past five years. As indicated in Table 4.2, there has been a small increase (4%) in comparison floorspace relating to the out of centre retail parks/ warehouses and superstores. There has been a more substantial rise in convenience floorspace from out of centre foodstore developments (15%).

Table 4.2
Retail and non-retail service floorspace and vacant floorspace in Dundee: trends 2009-2014 (sq m gross)

	Comparison floorspace		%	Convenience floorspace		%	Non-retail floorspace		%	Vacant floorspace		%
	2009	2014	*change*	2009	2014	*change*	2009	2014	*change*	2009	2014	*change*
Dundee City Centre	89,351	77,389	*-13%*	8,405	9,286	*10%*	41,747	41,614	*0%*	12,962	23,395	*80%*
District Centres (total)	16,752	26,056	*56%*	9,949	11,254	*13%*	18,489	19,957	*8%*	20,616	3,236	*-84%*
Albert Street	1,687	1,927	*14%*	2,180	2,214	*2%*	2,719	2,851	*5%*	710	434	*-39%*
Broughty Ferry	7,962	8,902	*12%*	2,971	3,220	*8%*	4,857	5,052	*4%*	1,344	101	*-92%*
Hilltown	1,502	4,777	*218%*	1,114	1,783	*60%*	4,445	5,800	*30%*	6,573	1,053	*-84%*
Lochee	4,196	9,101	*117%*	1,206	1,570	*30%*	3,405	3,023	*-11%*	11,816	1,576	*-87%*
Perth Road	1,405	1,349	*-4%*	2,478	2,467	*0%*	3,063	3,231	*5%*	173	72	*-58%*
Corner shops	16,796	20,137	*20%*	23,306	27,259	*17%*	26,046	26,173	*0%*	14,312	11,084	*-23%*
Retail warehouses/supermarkets	65,421	68,185	*4%*	60,797	70,200	*15%*	5,255	6,082	*16%*	8,833	5,291	*-40%*
Dundee total	190,220	191,767	*1%*	102,457	117,999	*15%*	91,637	93,826	*2%*	54,823	43,006	*-22%*

Source: Dundee City Council Retail Booklet 2014- floorspace based on Council surveys
Comparison and *convenience* retail floorspace is defined on the basis of primary usage in this table. For example, supermarkets and superstores are classified as convenience floorspace. For the retail capacity analysis, the split of convenience and comparison floorspace in supermarkets is applied, so the totals differ from this table.
The *retail warehouses/ supermarkets* category refers to out of centre retail developments, including retail parks
Non-retail floorspace refers to services and all other uses. *Vacant floorspace* includes retail and non-retail vacancies

Figure 4.1 Distribution of floorspace by type in the town centres

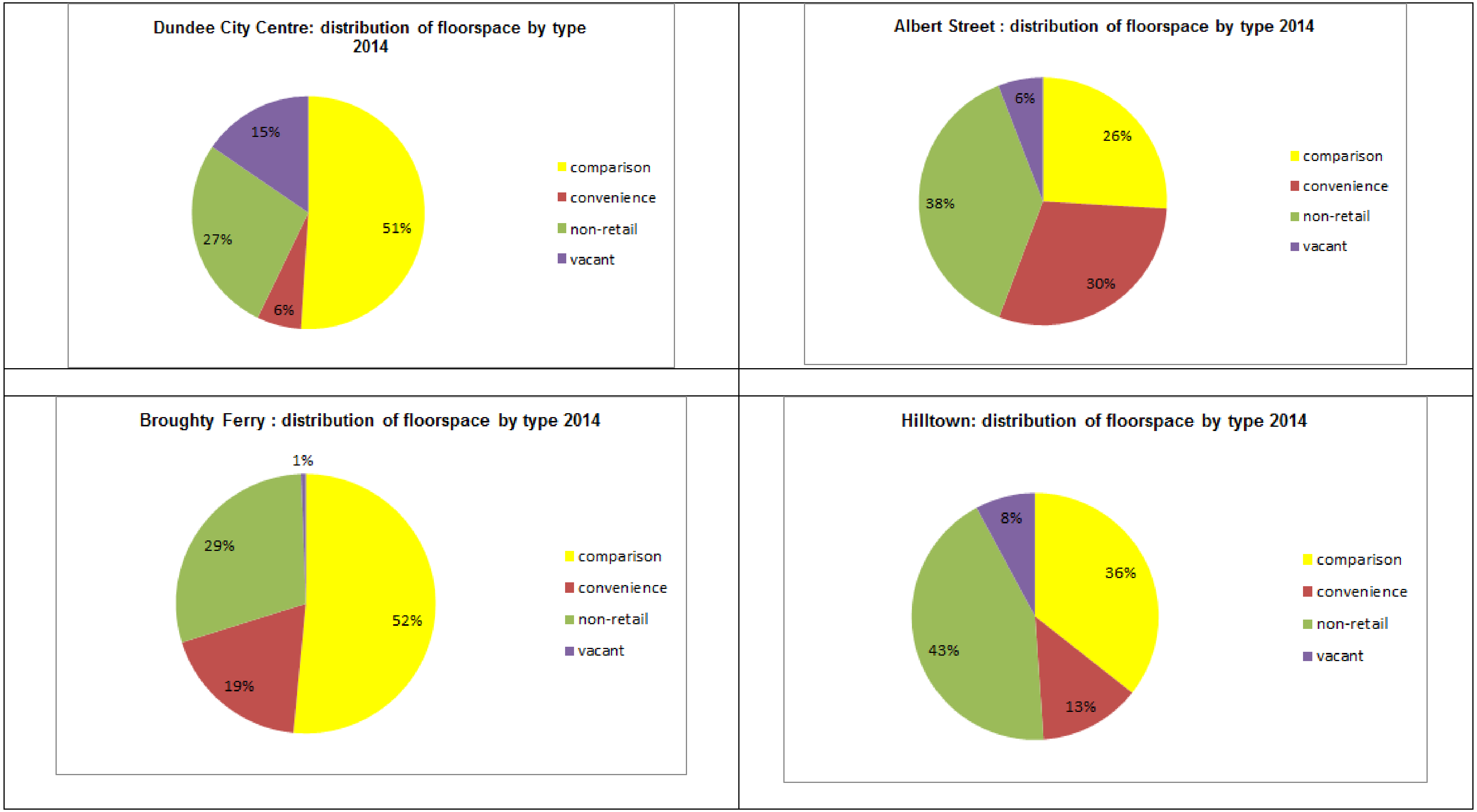
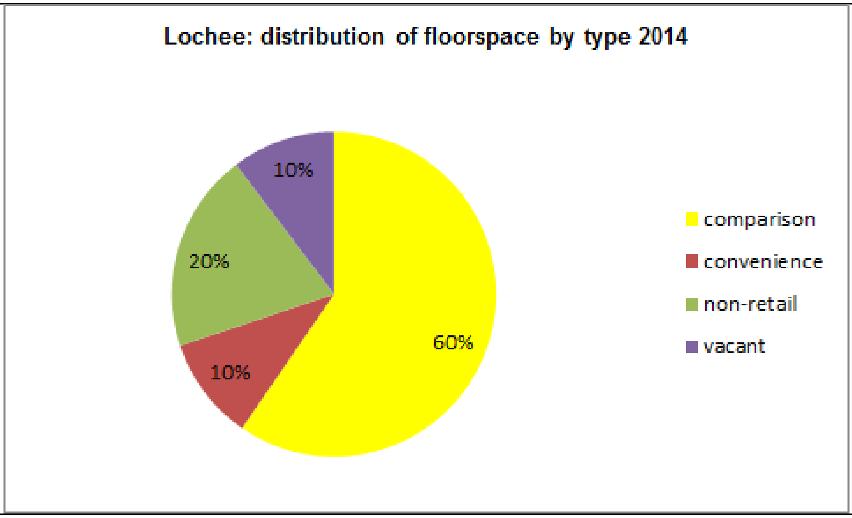


Figure 4.1 cont. Distribution of floorspace by type in the town centres



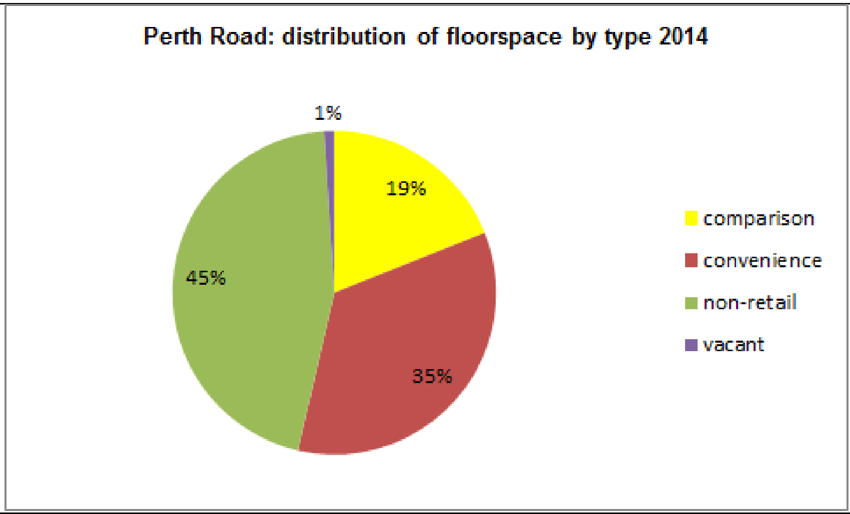


Table 4.3 **City Centre non-retail service floorspace- breakdown by type 2014**			
Type		Floorspace (sq.m)	%
1	Restaurants, Café, Pubs, Take Aways	22,080	53%
2	Other Services - Hair, Beauty, Cleaners, Travel Agents etc	7,253	17%
3	Banks, Building Societies, Financial Services, Insurance	4,992	12%
4	Property, Offices and Professional Services	4,373	11%
5	Leisure, Public Services, Halls, Post Office and miscellanous	2,916	7%
	Total	**41,614**	**100%**
Source:	Dundee City Council Survey 2014		

4.18 Vacancy rates

4.18.1 Recent research by the Scottish Retail Consortium indicates that the average shop vacancy rate in Scotland was 10.6% in July 2015, after a slight rise from 10.2% in the previous quarter. The UK rate is slightly lower at 9.8%. The SRC comment that the vacancy rate comes in combination with a general drop in High Street footfall in Scotland by 2.4% since July last year.

4.18.2 Table 4.1 shows an 80% increase in vacant floorspace in the City Centre since 2009, most of which occurred in 2011/12. Over the same period, the levels of vacant floorspace substantially reduced in the District Centres, and also elsewhere in Dundee.

4.18.3 Vacancy rates are commonly quoted on a unit basis, rather than on floorspace. Table 4.4 shows the vacancy rates for the City Centre and the District Centres in 2014, on a unit basis, which allows comparison with data published by organisations like the Scottish Retail Consortium and the Local Data Company.

4.18.4 The vacancy rate of 17% in the City Centre is much higher than the Scottish average. Among the District Centres, the vacancy rates are higher in Hilltown and Lochee, but very low in the other centres.

Table 4.4
Vacancy rates in the City Centre and District Centres 2014

	Vacant units	Total units	Vacancy rate
Dundee City Centre	98	578	17.0%
District Centres			
Albert Street	5	90	5.6%
Broughty Ferry	1	126	0.8%
Hilltown	19	113	16.8%
Lochee	10	76	13.2%
Perth Road	1	64	1.6%
Scottish town centre average, July 2015			10.60%

Sources: Dundee City Council Survey 2014 and Scottish Retail Consortium July 2015
The vacancy rate is expressed against all units in the denominator: convenience/ comparison retailing/ non-retail services and vacant units

5 Use and perceptions of the City Centre and District Centres

5.1 Introduction

5.1.1 A household telephone interview survey was commissioned for this study, gathering a sample of 1,000 households in the Dundee and Angus Council areas. It gathered valuable information on shopping patterns and on the public's use and perception of the City Centre and the District Centres. The list of questions asked in the household survey is provided in Appendix 1.

5.1.2 The research was conducted by NEMS Market Research and the Council areas were subdivided into zones with interview quotas. The zones are shown in Appendix 2, together with their populations and sample quotas. In fact the purpose of the zones was mainly to achieve a target distribution, as explanation of the findings in this report is at the Council area level. The output tables produced by NEMS, showing the questions and weighted responses, by zone and Council area, are provided in a separate document to accompany this report.

5.1.3 This section focusses on the results relating to the use and perceptions of the City Centre and District Centres (Q16-Q31). Analysis of the convenience shopping patterns from the survey is shown in section 7 and analysis of the comparison shopping patterns is shown in section 9 (Q1-Q15).

5.1.4 Very limited comparison with the 2006 Retail Study is possible because of the different questions and the expanded range of questions on use and perceptions of the City Centre in the current survey. Overall, the 2006 Retail Study concluded on page 36 that 'shoppers were largely content with the state of the City Centre'.

5.2 Frequency of visit to the City Centre

5.2.1 Table 5.1 shows the recorded frequency of visits to the City Centre. Dundee respondents visit much more frequently than respondents from Angus. For example, 26% of Dundee respondents visit weekly, compared to 8% from Angus. Some 30% of Angus respondents visited less than once a month, compared to 8% from Dundee.

5.3 Mode of travel to the City Centre

5.3.1 The normal mode of travel is shown in Table 5.1, which reveals that many people from Dundee use the bus or walk, in addition to those travelling by car. From Angus, the great majority travel by car.

5.3.2 By comparison, the 2006 Retail Study indicated that the proportions travelling to the City Centre by car and bus were broadly similar to the proportions for Dundee respondents only in the current survey. So the proportions travelling by car will be considerably higher now, taking account of the Angus respondents, and probably residents of East Fife and Perth/ Strathmore.

5.4 Dwell time in the City Centre

5.4.1 Most respondents from Dundee and Angus reported staying for between one and three hours, as indicated in Table 5.1. Compared to respondents from Dundee, higher proportions from Angus spent more than three hours in the City Centre

5.5 Main reasons for visiting the City Centre

5.5.1 The graph overleaf indicates the most frequently stated reasons for visiting the City Centre by the respondents from Dundee and Angus combined. Shopping is the predominant reason.

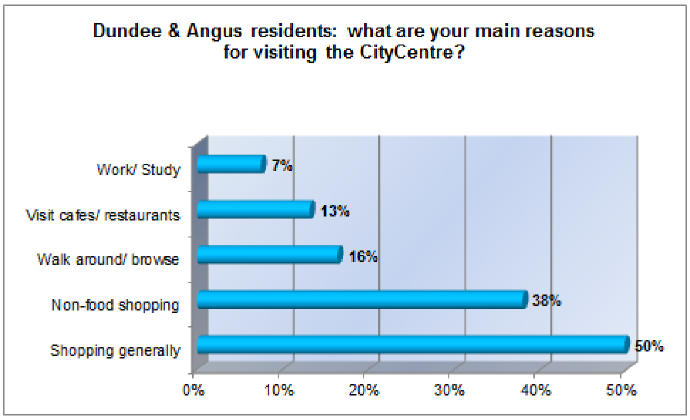
5.6 Likes and dislikes about the City Centre

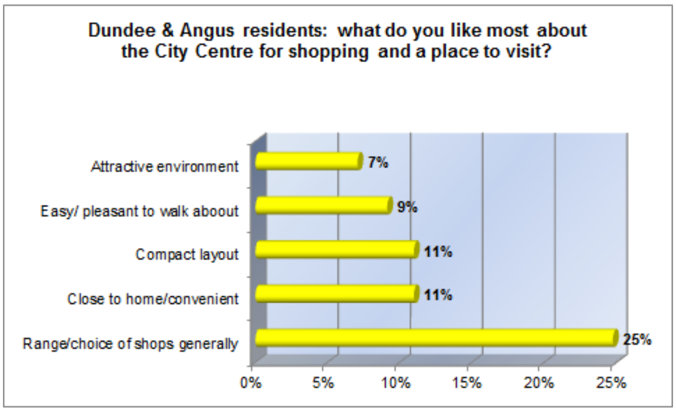
5.6.1 The respondents were asked to identify what they most liked and disliked about the City Centre. The most frequent responses are shown on the graphs overleaf. The main likes were 'the choice and range of shops' and 'close to home'. Under dislikes, nearly half the respondents mentioned 'nothing in particular', with small proportions mentioning 'too crowded' and 'anti-social behaviour'.

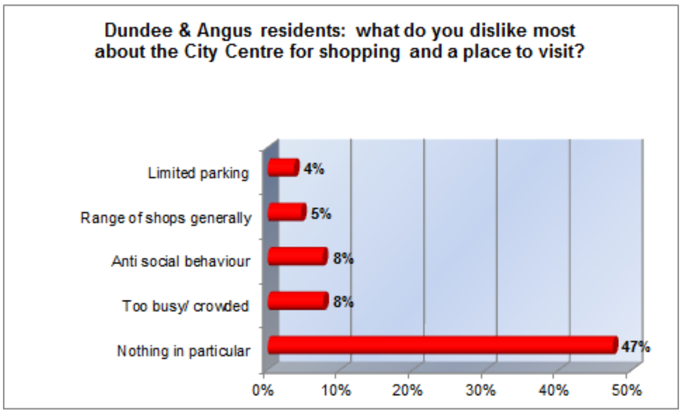
Table 5.1
Frequency of visit, mode of travel and dwell time in the City Centre, including frequency of visits in the evenings

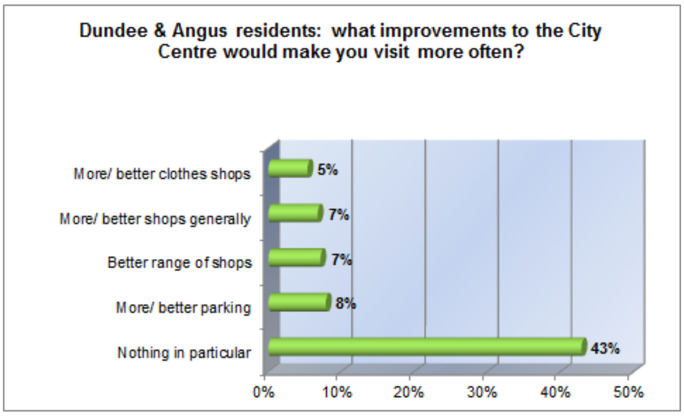
Frequency of visit to the City Centre	Dundee	Angus
Daily	11%	3%
Every 2 days	3%	0%
Between 3 times and 6 times a week	14%	1%
Weekly	26%	8%
2-3 times a month	18%	23%
Once a month	14%	25%
Less frequently than once a month	8%	30%
Never visit	5%	8%
(Don't know / varies)	1%	1%
Normal mode of travel to the City Centre	**Dundee**	**Angus**
Drive self in car / van	44%	72%
Passenger in car / van	5%	11%
Walk	12%	0%
Bus	35%	12%
Taxi	1%	0%
Cycle	1%	0%
Motorcycle	0%	0%
Train	0%	2%
Disability vehicle	0%	0%
Other	0%	0%
(Don't know)	1%	2%
Dwell time in the City Centre	**Dundee**	**Angus**
Less than 30 minutes	4%	0%
30 minutes - 59 minutes	12%	6%
1 hour – 1 hour 59 mins	33%	21%
2 hours – 2 hours 59 mins	33%	36%
3 hours – 3 hours 59 mins	7%	18%
4 hours or more	6%	13%
(Don't know)	4%	6%
Frequency of visit to the City Centre in the evenings after 6pm	**Dundee**	**Angus**
Daily	0%	0%
Every 2 days	1%	0%
Between 3 times and 6 times a week	5%	0%
Weekly	7%	0%
2-3 times a month	7%	5%
Once a month	7%	7%
Less frequently than once a month	14%	19%
Never	59%	68%
(Don't know / varies)	1%	0%

Use and perceptions of the City Centre- most frequent responses in the household survey









5.7 Improvements to the City Centre that would encourage more visits

5.7.1 The respondents were asked to identify improvements that would make them visit the City Centre more often. The most frequently mentioned responses are shown in the graph above, although 43% said 'nothing in particular'. Some 8% said 'more/ better parking' and 7% mentioned 'better range of shops' and 7% also mentioned 'more/ better shops generally' (equating to 14% combined).

5.7.2 In the 2006 Retail Study, the most frequently mentioned issues for improvement to the City Centre were 'the choice of shops' (14%), which is similar to the current survey findings. Other issues for improvement included less traffic congestion (6.5%) and 'more/ better places to eat and drink' (6%).

5.8 Rating the City Centre qualities

5.8.1 The respondents were asked to rate selected qualities of the City Centre in their experience. The assessments are shown in Table 5.2.

5.8.2 Most respondents from Dundee rated the *range and choice of shops* in the City Centre as 'good' (48%) or 'average' (42%). The rating as 'good' was much higher among respondents from Angus (65%). The ratings were broadly similar for the *quality of shops* in Table 5.2.

5.8.3 The *environment* in the City Centre was rated as 'good' by 56% of the Dundee respondents, with 34% rating it as 'average'. Respondents from Angus rated the City Centre as 'good' (61%) and 'average' (33%).

Table 5.2
Household survey- how the respondents rated the City Centre

	Dundee	Angus
Range and choice of shops		
Good	48%	65%
Average	42%	29%
Poor	9%	6%
Don't know	1%	1%
Quality of shops		
Good	51%	66%
Average	43%	30%
Poor	5%	3%
Don't know	2%	1%
Town Centre environment		
Good	56%	61%
Average	34%	33%
Poor	9%	5%
Don't know	1%	2%
Parking availability		
Good	38%	54%
Average	23%	27%
Poor	14%	11%
Don't know	25%	8%
As a pleasant place to visit		
Good	71%	73%
Average	25%	23%
Poor	4%	4%
Don't know	1%	1%

Table 5.3
Most requently mentioned leisure-related activities when visiting the City Centre in the evenings

	Dundee	Angus
Visit restaurants or cafés	64%	66%
Buy take-aways	32%	12%
Visit pubs / wine bars	66%	61%
Visit community cinema or theatre	36%	54%
Walking about / strolling	23%	14%
Use sports halls or gyms	19%	2%
Swimming	18%	4%
Community hall activities / meetings	4%	8%
Late shopping (when open)	28%	32%
Other	2%	6%
(Don't know / can't remember)	1%	0%
(None)	3%	2%

5.8.4 As shown in Table 5.2, the *availability of parking* was rated as 'good' by 38% of respondents from Dundee and 'average' by 23%. A high proportion said that they 'did not know', which probably reflects the widespread use of buses in Dundee. Parking availability was rated higher by respondents from Angus- 'good' (54%) and 'average'- (27%)

5.8.5 As a *pleasant place to visit*, over 70% of respondents from both Dundee and Angus assessed the City Centre as 'good'.

5.9 Frequency of visit to the City Centre in the evenings

5.9.1 The respondents were asked how frequently they visited the City Centre in the evenings and the findings are shown in Table 5.1. Some 59% of the Dundee respondents never visited and 68% of the respondents from Angus never visited. Some 14% from Dundee and 19% from Angus visited less than once a month. Other proportions of frequency of visit were small.

5.10 Leisure-related activities in the City Centre in the evenings

5.10.1 Table 5.3 shows the most frequently mentioned leisure-related activities undertaken in the City Centre by respondents from Dundee and Angus.. The wide list of activities identified in the City Centre reflects its role as the regional centre. The most frequently mentioned activities were: visting restaurants and cafes, visiting pubs and bars and (interestingly) visiting community cinema or theatre. Among Dundee respondents, the purchase of carry-outs also featured highly.

5.11 District Centres

5.11.1 The household survey also included some questions (Q28-Q31) on the use and perceptions of the five District Centres. Only respondents from Dundee were included, on the assumption that they were by far the predominant users. They were first asked to identify which of the five centres they used most often, with questions on frequency of visit, rating of qualities and issues for improvement relating only to the centre named by the respondent.

5.12 Most used District Centres

5.12.1 From the household survey, the most visited District Centres are in the order shown below:

• Broughty Ferry	36%
• Lochee	17%
• Perth Road	14%
• Albert Street	11%
• Hilltown	4%
• Don't visit District Centres	18%
	100%

5.12.2 The findings indicate that Broughty Ferry has a very substantial attraction as a suburban shopping centre, compared to the others. Hilltown has a relatively minor attraction.

5.13 Frequency of visit to the District Centres

5.13.1 Table 5.4 shows the recorded frequency of visits to each District Centre by those respondents who identified it as their most used centre. In general, people commonly visited weekly, followed by 3-6 times per week, or 2-3 times per month. Moderate proportions visited daily, with the exception of Hilltown, where a very high proportion visited daily.

5.14 Rating the qualities of the District Centres

5.14.1 The respondents were asked to rate selected qualities of their most used District Centre from their experience, similar to the rating applied to the City Centre. The assessments are shown in Table 5.2.

5.14.2 The *range and choice of shops* was rated highest in Perth Road and Broughty Ferry. Hilltown and Lochee received rather poor ratings. The *quality of shops* was given even higher ratings in Perth Road and Broughty Ferry, with Hilltown and Lochee again falling at the bottom of rating.

Table 5.4
Frequency of visit to the District Centres

	Albert Street	Broughty Ferry	Hilltown	Lochee	Perth Road
Daily	18%	17%	45%	7%	16%
Every 2 days	1%	7%	5%	4%	1%
Between 3 times and 6 times a week	16%	12%	18%	20%	18%
Weekly	21%	19%	10%	30%	32%
2-3 times a month	14%	22%	9%	17%	20%
Once a month	6%	15%	4%	14%	11%
Less frequently than once a month	20%	9%	4%	6%	3%
(Don't know / varies)	4%	0%	5%	1%	0%

Table 5.5
Household survey- how the respondents rated the District Centres

	Albert Street	Broughty Ferry	Hilltown	Lochee	Perth Road
Range and choice of shops					
Good	24%	55%	13%	15%	53%
Average	40%	36%	26%	39%	37%
Poor	32%	9%	51%	46%	9%
Don't know	3%	0%	10%	0%	2%
Quality of shops					
Good	26%	69%	19%	21%	77%
Average	46%	28%	33%	47%	19%
Poor	25%	3%	38%	31%	2%
Don't know	3%	0%	10%	0%	2%
District Centre environment					
Good	40%	82%	29%	16%	85%
Average	25%	16%	27%	40%	13%
Poor	32%	1%	33%	43%	0%
Don't know	3%	0%	10%	1%	1%
Parking availability					
Good	27%	19%	20%	36%	17%
Average	15%	32%	31%	24%	10%
Poor	27%	30%	20%	12%	53%
Don't know	31%	19%	30%	29%	19%
As a pleasant place to visit					
Good	35%	92%	26%	32%	89%
Average	43%	7%	23%	35%	9%
Poor	21%	1%	38%	33%	2%
Don't know	1%	0%	13%	1%	0%

5.14.3 The *environment* in the Perth Road and Broughty Ferry District Centres was rated as 'good' by over 80% of the respondents. Lochee, Albert Street and Hilltown were rated rather poorly on this quality.

5.14.4 As shown in Table 5.5, the *availability of parking* was rated highest in Lochee, and lowest at Perth Road, with mixed views on the other centres. The proportions saying that they 'did not know' were quite significant in some of the centres.

5.14.5 As a *pleasant place to visit*, around 90% of the respondents rated the District Centres at Perth Road and Broughty Ferry as a 'good'. Lochee and Hilltown were rated as relatively poorly on this aspect.

5.15 Improvements to the District Centres that would encourage more visits

5.15.1 The respondents were asked to identify improvements that would make them visit their selected District Centre more often. The most frequently mentioned responses are shown in Table 5.6. The provision of 'more / better' parking featured quite strongly for Broughty Ferry and Perth Road, but not so elsewhere.

5.15.2 'More/ better' shops generally were sought for Hilltown and Lochee, but not strongly for the other District Centres. The need for environmental improvements featured highly at Albert Street, as did the need for more leisure facilities at Hilltown.

Table 5.6
What improvements would make you visit your District Centre more often?
(most frequent responses)

	Albert Street	Broughty Ferry	Hilltown	Lochee	Perth Road
Nothing/ no change	38%	35%	27%	35%	46%
More/ better parking	8%	28%	0%	3%	36%
More/ better shops generally	9%	10%	24%	20%	2%
Better range of shops	13%	9%	6%	10%	5%
More/better clothes shops	1%	5%	6%	7%	2%
Improve the environment generally	22%	1%	9%	3%	0%
More leisure facilities	0%	2%	21%	1%	5%
Less vagrants	9%	0%	4%	7%	0%

5.16 Internet shopping

5.16.1 For main food shopping, 3% of respondents from Dundee used the internet and 1.9% from Angus. Over 60% used Tesco. For comparison shopping the proportion using the internet is 20% from Dundee (Table 9.1) and 29% from Angus (Appendix 9).

5.16.2 The respondents were asked how often they used the internet for non-food shopping. The replies for Dundee and Angus combined were: Very frequently 19%, Quite frequently 27%, Occasionally 27% and Never 27%. The predominant reasons for not using the internet were: 'not having a computer' and 'not computer literate'.

5.16.3 The respondents were asked what they liked best about shopping online. The most frequently mentioned reason was 'convenient/ saves time' (55%), followed by 'cheaper prices' (14%) and 'wide range of goods' 13% and 'rapid delivery' 12%.

5.16.4 After that, the respondents were asked about their intended use of the internet in the future for non-food shopping. Nearly 19% said 'more often', 57% said 'about the same', 2% said 'less often' and 20% said 'never'.

6 Qualitative assessment of the shopping centres in Dundee

6.1 Introduction

6.1.1 This section contains a summary health check assessment of the City Centre with a SWOT analysis and qualitative appraisals of the District Centres, Commercial Centres (retail parks) and the range of out of centre supermarket/ superstore offer. The aim is to provide an overview for Dundee, which draws on the research in other sections of this study.

6.2 City Centre health check

6.2.1 The health check draws on the range of key performance indicators set out in Appendix A of Scottish Planning Policy (SPP 2014).

6.2.2 **Retailer representation and demand-** the multiple retailer representation is 60% (133 out 223 convenience and comparison retailers), based on the City Council's survey data. This is a very high proportion, which reflects the City Centre's role as a regional centre. By way of comparison, the multiple retailer representation in Perth is around 30%. At present, retailer demand is limited although the City Centre is trading strongly. There is evidence of strong competition from the internet (sections 4 and 5). Note that the household interview findings indicated that 19% of the respondents intended to increase their use of the internet for shopping (section 5.16). Nevertheless, the range, choice and quality of shops in the City Centre was rated quite well by respondents to the household survey (Table 5.2).

6.2.3 Support for new retail development opportunities in the City Centre will be essential to meet the requirements when the demand cycle rises and also to compete with the internet. It will also be important to ensure that the retail offer remains strong in order to capitalise on links with the Waterfront/ V&A development to boost the City Centre for 'destination' shopping.

6.2.4 **Prime retail rents and Commercial yields-** as shown in sub section 4.16, Zone A retail rents in the City Centre are around £100 per sq ft. That level is good in the Scottish market, although lower than rents in the largest cities. Commercial yields are about 7.2%. Overall, the performance is reasonable. Dundee's location provides a very self-contained catchment market which protects it to a degree from competition from other cities.

6.2.5 **Vacancy rates-** at 17%, the vacancy rate in the City Centre is much higher than the Scottish average, as shown in Table 4.4. The level of vacant units indicates some mismatch in supply of suitable units and demand. It would be desirable to reduce the proportion of vacant units.

6.2.6 **Committed developments-** the proposed 20,000 sq m expansion of the Overgate Centre (Table 9.7) represents the greatest opportunity to increase the retail offer in the City Centre and strengthen its role as a regional centre. The presence of this commitment is encouraging, as it reflects the position in larger cities/ malls elsewhere, which have similar consents. However, the proposals await an upturn in the demand cycle.

6.2.7 **Diversity of uses and change-** there is a wide level of variety including retail and commercial uses, public services, community uses, arts, leisure, halls, museums, conference facilities, tourism and residential. Dundee is also a University town

6.2.8 The information on retail and commercial uses in sub section 4.17 and Figure 4.1shows that over half the floorspace in the City Centre is devoted to comparison shopping, which is supportive of its role as a regional centre. However, the decline in comparison floorspace since 2009 reflects changes in the market, including increased internet spending. The significant level of non-retail service floorspace (27%) is also important to support the retail offer and the City Centre's overall attraction as a destination. Nevertheless, concentration of the retail offer in the core City Centre areas should be retained and not be diminished by the introduction of other uses.

6.2.9 **Quality of built environment and recent/ proposed investment-** the City Centre generally has high quality streetscapes, both through incremental improvements and major improvements such as the previous City Square regeneration works (£2.2 million). There is Conservation Area coverage with support from the City Heritage Trust (£0.75million). It will be important to continue to maintain environmental enhancements in order to ensure that the City Centre remains attractive to shoppers and visitors alike.

6.2.10 The quality of the City Centre environment was rated well in the household survey and also it was rated very strongly as a pleasant place to visit (Table 5.2). The Dundee Partnership Single Outcome Agreement has a mission to promote Dundee as a destination to live-in and to visit.

6.2.11 **Leisure and tourism facilities-** in and around the City Centre there is the McManus Gallery, Dundee Contemporary Arts, the Rep Theatre, concerts performed and conferences held (Caird Hall), museums, the Science Centre, Discovery Point, Olympia Leisure Pool cinemas, dining out and cafes/ restaurants. The latter occupy substantial floorspace in the City Centre, as indicated in Figure 4.3. Development of the V&A will considerably enhance the attractions (£80 million investment) in addition to other leisure within the Waterfront Masterplan. There are proposals to develop a cinema complex at the Wellgate Shopping Centre, including new restaurants, cafes and other leisure related uses.

6.2.12 The findings of the household interview survey show that many of these attractions feature strongly as leisure-related activities undertaken by residents (Table 5.3).

6.2.13 **Cultural activity-** Dundee has a range of cultural and social events, including the annual photographic exhibition, Dundee Womens' Festival, the Spring Festival, jazz and blues concerts, the October Festival, the Literary Festival, Film Festival, Science Festival and others.

6.2.14 The Waterfront Masterplan will include leisure, retail, hotel, offices, civic uses plus the forthcoming V&A Museum.

6.2.15 **Night time economy-** the findings of the household survey in sub sections 5.9 and 5.10 reveal the frequency of visits and activities undertaken by the public in the City Centre in the evenings. The majority never visit in the evenings, but those that do, get involved in a wide range of activities.

6.2.16 **Pedestrian footfall-** is an important indicator of how busy the City Centre is in various locations, which is a useful indicator for retail pitches, among other activities. There has been no comprehensive pedestrian flow count since the 2006 Retail Study. Some indication can be inferred from footfall counts in the Overgate Centre and in the Wellgate Centre, which are amongst the prime locations in the City Centre.

6.2.17 In the Overgate Centre, the management report that annual footfall in 2014 was 12.3 million, down from 13.6 million in 2011. At the Wellgate, the management report a gradual decrease between the same dates. The footfall ranged between over 7million, down to over 6 million. It is reasonable to consider that there has been a similar decline in other locations in the City Centre. The absence of a comprehensive City Centre survey should be remedied for planning purposes if budgets allow.

6.2.18 **Accessibility and signage-** Dundee is a gateway between Central Scotland and the North East, located on the A90 linking Perth and Aberdeen and A92 linking with Fife. Within Dundee, radial roads leading from the City Centre link with the A92 Ring Road. It is proposed to develop new Park & Ride facilities at Riverside, at Forfar Road and at Monifieth, plus a site south of the Tay Bridge. Accessibility issues did not feature much in the household survey findings, although a small proportion mentioned traffic congestion.

6.2.19 **Public transport and parking-** Dundee has good rail connections and a list of bus services is provided in Appendix 15. Bus usage by Dundee residents is quite high (Table 5.1).

6.2.20 Dundee has 29 car parks in and around the City Centre with some 5,000 spaces. There is a further 530 on-street spaces. Parking charges apply. The issue of parking did not feature strongly in the household survey findings on 'likes' and 'dislikes' of the City Centre. Only 4% included 'limited parking' as a dislike and 8% indicated that 'more/ better parking' would encourage them to visit the City Centre more often- see also Table 5.2 on how parking was rated.

6.2.21 **Public attitudes and perceptions of the City Centre-** has been covered in section 5.

6.3 SWOT summary

6.3.1 The summary SWOT analysis (strengths, weaknesses, opportunities and threats) for the City Centre is shown below.

Strengths	Weaknesses
• Regional centre with a wide variety of town centre uses	• Retailer demand slow to materialise in support of major retail development proposals (eg Overgate)
• Very low level of retail expenditure leakage	• High retail vacancy rate indicates mismatch between supply and demand for suitable units
• Extensive defined catchment area, plus a visitor destination	• High costs of improvements and building maintenance in historic centre
• Strong retail offer with wide multiple retailer representation	• Scope for further improvement to the range, choice and quality of shops
• Good range of non-retail services and leisure-related facilities	
• The City Centre is rated well by respondents to the household survey	
• Attractive setting, including historic street environment	
• Good accessibility	
Opportunities	**Threats**
• Waterfront and V&A will strengthen attraction to Dundee as a destination	• Continued growth in internet retail expenditure and the effect on demand for new floorspace
• Future development of the proposed Overgate extension	• Failure to develop major new retail floorspace in the City Centre
• Continue to support proposals which strengthen Dundee's retail offer	• Any weakening of the control over out of centre retail developments
• Continued investment in the environment in the City Centre and District Centres	• Any reduction in effort to improve the commercial offer and environmental quality
• Host more events/ promotions	• Any failure to capitalise on the Dundee Waterfront and the V&A

6.4 District Centres

6.4.1 Map 3.2 shows the location of the five District Centres. Larger scale maps are provided in Appendix 6 of the Dundee LDP, showing the allocated retail frontages in each centre.

6.4.2 Note that information on commercial yields has not been included for the District Centres because of the limited comprehensive evidence from recent transactions.

6.5 Albert Street

6.5.1 The District Centre is characterised by traditional tenement buildings with mainly small shops on the ground floor, interspersed with residential use. From the household survey, the quality of the environment was not rated particularly highly (Table 5.5). The desire for environmental improvements featured more prominently in the household survey, compared to the other District Centres (Table 5.6).

6.5.2 The mix of uses is shown in section 4 and Figure 4.1, with non-retail services and convenience shopping featuring most. A slight increase in retail and service floorspace since 2009 has occurred (Table 4.2).

6.5.3 The vacancy rate is quite low at 6% (Table 4.4), indicating a broad balance between supply and demand for space. Main retailers include the *Co-op and Boots*. Multiple retailer representation is 10% (4 out of 40 convenience and comparison retailers).

6.5.4 Retail rents are £10-£16 per sq ft. We are not aware of specific retailer requirements to locate in Albert Street. The quality of shops was mostly rated as average in the household survey (Table 5.5). The proximity of Lidl in Dura Street will limit the scope for additional convenience floorspace.

6.5.5 **Albert Street SWOT** - the District Centre has a fair mix of retail and non-retail uses which continue to provide a solid local service, with no evidence of decline. With few obvious physical opportunities for expansion, the main potential threat could be from any additional out of centre retail development arising in the vicinity.

6.6 Broughty Ferry

6.6.1 Broughty Ferry is an attractive, busy shopping centre located along Brook Street, including parts of Gray Street. The District Centre is a mix of two/ three storey Victorian parades, interspersed with more modern single storey units. From the household survey findings, it is by far the most used District Centre (sub section 5.12). The quality of environment was rated highly, and as a pleasant place to visit (Table 5.5). Improved parking may increase the potential for more custom (Table 5.6).

6.6.2 The mix of uses is shown in section 4 and Figure 4.1, where a high proportion of comparison retailing is evident. There has been an increase in retail and non-retail service floorspace since 2009 (Table 4.2)

6.6.3 The vacancy rate is minimal at less than 1%. (Table 4.4), indicating a balance between supply and demand for space, or even a potential demand for more space. Main retailers include *M&S Simply Food, Boots, Semi Chem, M&C, Tesco Express and Superdrug*. Multiple retailer representation is 15% (11 out of 74 convenience and comparison retailers). Retail rents are £18-£33 per sq ft, which are the highest among the District Centres.

6.6.4 An important strength of Broughty Ferry is the high quality of the independent retailers. The range, choice and quality of retailing was rated highly in the household survey (Table 5.5). There is a named property requirement by a pizza chain, but no other specific retailer requirements to locate in Broughty Ferry.

6.6.5 **Broughty Ferry SWOT** - the District Centre has a strong mix of quality retailing and non-retail services. It is trading well and it is popular with its local catchment, which is probably the most prosperous residential area of Dundee. There are few physical opportunities for expansion and no obvious threats to the District Centre, provided the quality of retailing is maintained.

6.7 Hilltown

6.7.1 Hilltown District Centre extends along Hilltown, Mains Road and Strathmartine Road. It is characterised by traditional tenement buildings with mainly small shops on the ground floor, interspersed with residential use. From the household survey, the quality of the environment was not rated highly, nor was Hilltown rated by many as a pleasant place to visit (Table 5.5). It was the least visited among the District Centres (sub section 5.12).

6.7.2 The mix of uses is shown in section 4 and Figure 4.1, with non-retail services and comparison shopping featuring most. Levels of retail and non-retail floorspace have expanded extensively since 2009, for reasons explained in section 4 (see also Table 4.2).

6.7.3 The vacancy rate is quite high at 17% in terms of unit numbers (Table 4.4), but not in terms of floorspace (Figure 4.1). The pattern suggests that there are too many small units for which there is limited demand.

6.7.4 Main retailers include the *Co-op Pharmacy, Tesco Express and Boots*. Multiple retailer representation is 10% (4 out of 40 convenience and comparison retailers).

6.7.5 Retail rents are £9-£10 per sq ft which are the lowest among the District Centres. We are not aware of specific retailer requirements to locate in Hilltown. The range, choice and quality of shops was rated as the lowest among the District Centres (Table 5.5). Correspondingly, the household survey indicated that more/ better shops would encourage more people to visit (Table 5.6). Also, more leisure facilities were sought.

6.7.6 **Hilltown SWOT** - increases in the level of retail and non-retail floorspace indicates that Hilltown functions as a commercial location, but the quality of shopping is relatively poor, as is the general environment. Review of the level and distribution of vacant small units would be desirable, to assess whether changes in use could be considered. The level of comparison floorspace is rather dependent on one retailer (*Dundee Market Traders*). Probably the main potential threat would be failure to upgrade the quality of shopping.

6.8 Lochee

6.8.1 Lochee District Centre extends along High Street as it curves round the junction with Methven Street, which is also included within the Centre. The Stack Leisure Park is immediately adjacent and it is subject to LDP Policy 22 to ensure new development at the Stack is complementary to the Lochee District Centre.

6.8.2 It is characterised by a mix of traditional tenement buildings with mainly small shops on the ground floor, together with 1960s/ 1970s style commercial units around the junction with Methven Street. From the household survey, the quality of the environment was not rated very well, and rather average/ poor as a place to visit (Table 5.5). It was the second most visited among the District Centres (sub section 5.12).

6.8.3 The mix of uses is shown in section 4 and Figure 4.1, with a high proportion of comparison floorspace, mainly due to recent arrival of *The Range*. Levels of convenience and comparison floorspace have expanded since 2009, with some decline in non-retail service floorspace (Table 4.2).

6.8.4 The vacancy rate of 13% in terms of unit numbers is second to Hilltown, but 10% in terms of floorspace.

6.8.5 Main retailers include *The Range, Boots, Superdrug, Farmfoods, Poundstretcher, and Lloyds Pharmacy*. Multiple retailer representation is good at 26% (9 out of 35 convenience and comparison retailers). There is a named property requirement for a vet surgery, but no specific retail requirements. Retail rents are £11-£17 per sq ft.

6.8.6 The range, choice and quality of shops was largely rated as average/ poor in the household survey (Table 5.5). Correspondingly, the household survey indicated that more/ better shops and better range of shops would encourage more people to visit (Table 5.6).

6.8.7 **Lochee SWOT** - increases in the level of retail floorspace indicates that Lochee functions successfully as a commercial location, but the quality of shopping is relatively poor, as is the general environment. Re-occupation of some of the vacant units would be desirable, especially with non-retail services to secure a more rounded balance with the retail offer. Improvements to the range and quality of shopping are needed, although it may be difficult to improve the convenience offer with the proximity of Aldi at The Stack. The main potential threat to the Lochee District Centre would be situations arising where retail proposals at The Stack do not complement Lochee, but compete with it.

6.9 Perth Road

6.9.1 Perth Road District Centre extends in a linear form. It is characterised by traditional tenement buildings with mainly small shops on the ground floor, interspersed with residential use. From the household survey findings, it is well used (sub section 5.12). The quality of environment was rated highly, and as a pleasant place to visit (Table 5.5). Parking availability is an issue and improved parking may increase the potential for more custom (Table 5.6).

6.9.2 The mix of uses is shown in section 4 and Figure 4.1, where there are high proportions of non-retail service and comparison floorspace. There has been no material change in the floorspace categories since 2009 (Table 4.2)

6.9.3 The vacancy rate is minimal at less than 2%. (Table 4.4), indicating a balance between supply and demand for space. Main retailers include *Boots and Greggs.* Multiple retailer representation is 10% (3 out of 29 convenience and comparison retailers). Retail rents are £16-£21 per sq ft.

6.9.4 An important strength of the retail offer at Perth Road is the high quality of the independent retailers, including many small specialists, with an emphasis on arts, crafts, antiques, jewellery etc. The range, choice and quality of retailing was rated highly in the household survey (Table 5.5). We are not aware of specific retailer requirements to locate in Perth Road.

6.9.5 **Perth Road SWOT** - the District Centre has a strong representation by small specialist retailers, especially in the comparison sector. Thus, in some ways it provides a sort of niche shopping offer. There is probably little room for change, as evidence of the mix of offer since 2009 demonstrates. Probably the main potential threat to the District Centre would be any significant loss among the specialist offer, which would reduce the overall attraction as a destination for this type of shopping. Potential threats could emerge from improvements to the range in the City Centre and from the internet.

6.10 Commercial centres

6.10.1 The list of occupiers in the three Dundee retail parks is shown in Table 9.6. Restrictions on the range of goods that can be sold on each park is addressed in the final section of this report. **Kinsgway West Retail Park** is the largest, with a very wide range of mainly bulky goods operators. Only one vacant unit was recorded by the Council's survey in 2014. **Kingsway East Retail Park** is smaller, with an emphasis on fabrics, DIY and homewares, with one vacant unit recorded.

6.10.2 Both the Kinsgway Retail Parks are very accessible to Dundee residents and others, by their location on the Kingsway Ring Road. The format and buildings in these parks is of a fair standard. While we are not aware of specific bulky goods retailer requirements to locate in these parks, these could emerge as the market improves. Given the high level of occupancy, the allocation of an additional site by the Gallagher Retail Park for bulky goods operators under LDP Policy 25 will create the opportunity for additional provision.

6.10.3 **Gallagher Retail Park** is located close to the City Centre and has proved successful in achieving a full take-up by mainly clothes, shoes and sports goods retailers to complement the City Centre offer. Provision of an additional retail park of this nature may risk prejudicing potential future retailer demand to locate in the City Centre and the proposed Overgate extension.

6.10.4 In addition, there are some significant out of centre retailers, including *B&Q, Sterling* and others shown in Table 9.6

6.11 Supermarkets and superstores

6.11.1 A list of the supermarkets and superstores in Dundee is shown on Table 7.5. Commentary on the range of supermarket provision is provided in sub section 4.13 and sub section 8.4.

7 Convenience expenditure and turnover

7.1 Introduction

7.1.1 This section examines the convenience expenditure and turnover relationships in Dundee.

7.1.2 The relationship between expenditure and turnover in any study area can be expressed simply as: *residents' expenditure potential plus inflows, minus outflows equals total turnover.* The estimated distribution of turnover within a study area has to correspond with the level and distribution of retail floorspace by type.

7.2 Dundee convenience expenditure potential

7.2.1 Table 7.1 shows the forecast convenience expenditure per capita for the Dundee Council area, based on Experian data commissioned for this study.

Table 7.1
Dundee residents' convenience expenditure per capita per annum (in 2014 prices)

2013 £	2015 £	2021 £	2026 £
2,230	2,230	2,302	2,387
**Excluding special forms of trading (SFT)- from survey*			
	2,168	2,201	2,268

Sources:
The original figure for 2013 is 2,198 in 2013 prices from Experian, for the Angus Council area. The figure shown above is in 2014 prices,based on price indices for 2013/ 2014 in *Experian Retail Planner Briefing Note 12- Appendix 4b*.
The forecast growth to 2015, 2021 and 2026 is based on the UK convenience expenditure per capita in *Experian Retail Planner Briefing Note 12- Appendix 4a.*

Deductions require to be made to allow for special forms of trading (SFT- internet expenditure ,mail order etc), which do not relate to convenience floorspace. The proportions deducted derive from *Experian Retail Planner Briefing Note 12* - Appendix 3-(adjusted SFT to remove proportion from stores).

	2015	2021	2026
	-2.8%	-4.4%	-5.0%

Table 7.2
Dundee convenience expenditure potential (in 2014 prices)
Excluding special forms of trading

	2015 £ million	2021 £ million	2026 £ million
Dundee Council area	324.3	341.5	363.8

Note
Derived from Table 7.1 and the population projections in Table 2.1

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

7.2.3 Forecasts of the total convenience expenditure potential of the residents of Dundee are shown in Table 7.2. The growth rate to 2026 is the result of combining projected population growth from Table 2.1 with the forecast growth in expenditure per capita.

7.3 Convenience expenditure patterns- Dundee & Angus

7.3.1 The household survey findings on main food shopping and top-up shopping patterns in Dundee and Angus are weighted and combined in Appendix 3 to show all convenience shopping patterns. The outcome is shown in Table 7.3.

7.3.2 Some 95% of convenience shopping by Dundee residents is made in Dundee, with only 5% leakage to other destinations (mostly to Angus). Some 22% of convenience shopping by Angus residents is made in Dundee, with most of the balance in stores in Angus.

Table 7.3
Dundee and Angus convenience shopping patterns

	Origin	
	Dundee	Angus
Destination		
All Dundee	*95%*	*22%*
City Centre	*10%*	*1%*
5 District Centres	*4%*	*1%*
Dundee ASDA/ Tesco/Morrisons/Sainsbury's- (out of centre)	*55%*	*16%*
Other Dundee shops	*25%*	*4%*
Angus	*5%*	*78%*
Perth	*0%*	*0%*
Other destinations	*0%*	*0%*
Total	100%	100%

Note
Derived from the NEMS household survey, w ith main food and top-up shopping combined. See Appendix 3
The w eighting assiumes 80%:20% main food: top shopping

7.4 Convenience expenditure and turnover in Dundee

7.4.1 Table 7.4 shows the total convenience expenditure made in Dundee, by local residents plus inflows from Angus and the rest of the Dundee catchment, plus visitor spending.

7.4.2 The convenience expenditure potential of the Angus residents is calculated in the same way as for Dundee, including the proportion made in Dundee as shown in Appendix 4.

7.4.3 Examination of the Perth & Kinross Retail Study 2014, and the household survey which supports it, reveals that 9% of convenience expenditure by residents of the Perth City area and Strathmore combined is made in Dundee. This is shown in Appendix 5. Similarly, analysis of the Fife Retail Capacity Study 2014 indicates that 12% of convenience expenditure by residents of East Fife is made in Dundee, as shown in Appendix 6. An estimate of visitor convenience expenditure in Dundee from beyond the primary and secondary catchment is included, with explanation in the footnote to Table 7.4.

Table 7.4 **Dundee convenience expenditure and turnover (in 2014 prices)** ***Excluding special forms of trading***				
		2015 £ million	2021 £ million	2026 £ million
Dundee Council area		324.3	341.5	363.8
Add: inflows				
From Angus		58.7	59.8	61.7
From Perth City/ Strathmore		53.8	53.9	61.7
From East Fife		70.5	74.4	78.4
*From visitors		2.7	2.7	2.8
Less: outflows				
From Dundee to other destinations	-5%	-16.2	-17.1	-18.2
Retained expenditure (turnover)		493.8	515.2	550.1

Note
See Appendices 4- 7 for explanation of expenditure inflow s
* Source: Draft STEAM Report for Dundee 2014 - Dundee City Council. Page 15-Visitor expenditure on shopping in Dundee is £17.73million in 2014. Assumed split at 25% convenience and 75% comparision goods (R MacLean estimate).

7.4.4 From the expenditure patterns in Table 7.4, it is deduced that the total convenience turnover in Dundee is currently nearly £494 million, which is forecast to rise to some £550 million by 2026.

7.5 Convenience floorspace and turnover in 2015

7.5.1 The current distribution of convenience floorspace in Dundee is shown in Table 7.5, based on the Council's 2014 retail floorspace survey. It is also summarised in their *Retail Booklet 2014* publication, although there is no split of the supermarket floorspace into convenience and comparison floorspace in that document. The categories shown in Table 7.5 reflect those defined in the Retail Booklet.

7.5.2 Table 7.5 shows the turnover at average levels, based on the Retail Rankings 2015 for the named supermarkets and estimates for other shops collectively, based on consideration from other studies. It is controlled to the survey based *total* turnover from the household survey (£493.8 million). The difference between the average and actual totals indicates a modest 7% over-trading in Dundee as a whole. Over-trading refers to the situation when the survey based estimates of turnover, based on expenditure patterns, exceeds the turnover based on published company averages.

7.5.3 The last column in Table 7.5 shows the turnover levels for the City Centre, District Centres, corner shops and supermarkets based on the household interview surveys alone, with inflows expenditure from outside Dundee from Table 7.4.

7.5.4 Within Dundee, the main differences between the survey based turnover and the turnover at average levels occur with the low survey based estimates for the District Centres and the high estimate for the corner shops. In the opinion of this report, these are under and over-estimates respectively by the survey based assessment because they do not properly reflect the associated levels of floorspace. Also, it is probable that much of the surplus will relate to the supermarkets. Nevertheless, it is interesting to note that the survey indicates that the corner shop category is performing well in Dundee.

7.5.5 For clarification, this study emphasises the importance of the total turnover figure for Dundee from the survey, but attributes less weight to the accuracy of the survey based sub totals in the last column of Table 7.5.

7.6 Convenience retail planning commitments

7.6.1 Table 7.6 shows the current convenience retail planning commitments in Dundee. These are relatively minor and include another Aldi and retail floorspace within proposed new local centres. It is assumed that the commitments could be developed and operational by 2021.

Table 7.5
Dundee convenience retail floorspace and turnover 2015 (in 2014 prices)

	Area		(1) Turnover (average levels)		Turnover from from survey only
	sq m gross	sq m net	Turnover £ per sq m	Total £million	(2) £million
Dundee City Centre	**9,286**	**6,036**		**49.2**	41.9
Tesco Metro	1,525	1,068	9,832	10.5	
Tesco Express, Nethergate	186	140	15,893	2.2	
Tesco Express, Hawkhill	369	277	15,893	4.4	
M&S - food sales in Murraygate store.	1,818	1,273	10,217	13.0	
Lidl, South Ward Road	900	675	5,051	3.4	
Other City Centre shops	4,488	2,605	6,000	15.6	
District Centres- total	**11,254**	**6,977**		**38.9**	21.9
Albert Street					
Co-op	1,443	866	6,500	5.6	
Other Albert Street shops	771	463	3,500	1.6	
Broughty Ferry					
M&S Simply Food, Broughty Ferry	1,690	1,183	10,217	12.1	
Other Broughty Ferry shops	1,530	918	4,000	3.7	
Hilltown					
Tesco Express, Strathmaritime Rd	371	278	15,893	4.4	
Other Hilltown shops	1,412	847	3,500	3.0	
Lochee	1,570	942	3,500	3.3	
Perth Road	2,467	1,480	3,500	5.2	
Corner shops (incl Aldi, Stack, Lidl Macalpine Rd & various Co-ops)	**27,259**	**16,355**	3,500	**57.2**	112.5
Out of centre supermarkets-(convenience floorspace)	**51,074**	**30,317**		**316.0**	317.6
Tesco Extra, Kingsway West- total 10,100 sq m gross- 70% conv	7,070	3,889	9,832	38.2	
Tesco, Riverside Drive- total 7,814 sq m gross- 70% conv	5,470	3,282	9,832	32.3	
Tesco Extra, South Road- total 8,450 sq m gross- 60% conv	5,070	3,042	9,832	29.9	
ASDA, Myrekirk Road- total 8,295 sq m gross- 70% conv	5,807	3,484	11,667	40.6	
ASDA, Milton- total 9,067 sq m gross- 60% conv	5,440	3,264	11,667	38.1	
ASDA, Derwent Av/Kirkton- total 5,828 sq m gross- 80% conv	4,662	2,797	11,667	32.6	
Morrisons, Afton Way-total 8,175 sq gross- 80% conv	6,540	3,270	11,155	36.5	
Sainsbury's, Tom Johnston Rd- total 6,448 sq m gross-90% conv	5,803	3,482	9,895	34.5	
Aldi, Arbroath Road- total 2,526 sq m gross- 80% conv	2,021	1,516	9,458	14.3	
Lidl, South Road- total 1,286 sq m gross- 90% conv	1,157	868	5,051	4.4	
M&S Simply Food, Gallagher Retail Park	2,034	1,424	10,217	14.5	
Total at average levels	**98,873**	**59,686**		**461.2**	
Over-trading			*7%*	***32.5***	
Total from survey- actual level					**493.8**

Note
Gross floorspace based on Dundee City Council 2014 survey. Convenience/ comparison splits are estimates by R MacLean, including consultations with individual store managements.
(1) Average turnover of supermarkets from the Retail Rankings 2015, adjusted to 2014 prices in 2015
(2) Turnover levels derived from the household surveys for Dundee and Angus and from surveys upporting the Perth & Kinross and Fife Retail Capacity Studies 2014. See apportionment in Appendix 7.

Table 7.6
Convenience retail planning commitments in Dundee: floorspace and turnover (in 2014 prices)

	Floorspace sqm		2015 Turnover ratio £/sq m	2015 Turnover £million	*2021 Turnover £million
	gross	net			
15/00404/FULL Aldi, Myrekirk Rd, total 1,887 sq m gross- 80% conv	1,510	1,003	9,458	9.5	9.9
15/00309/FULL Longhaugh Neigbourhood Centre- 4 units Units 1/3/4= 275 sq m gross- assume non retail service Unit 2 = 629 sq m gross- assume convenience	629	377	3,500	1.3	1.4
11/00055/FULL New Life Services Centre, Whitfield- retail floorspace 1,150 sq m gross- assume 50% convenience	575	345	3,500	1.2	1.3
Total	2,714	1,725		12.0	12.5

Note
The gross floorspace data derives from the City Council
Net floorspace of the Aldi derives from supporting information to the application. The turnover ratio is based on the 2015 Retail Rankings, which shows a recent rise in the turnover ratio of Aldi.
The net floorspace and turnover ratios for the other commitments are estimates by Roderick MacLean Associates
* Allowance for turnover growth 2015-21 is based on the forecast turnover growth in Dundee in Table 7.4; a factor of 1.0434

8 Spare convenience expenditure capacity to 2026

8.1 Introduction

8.1.1 This section provides estimates of the spare convenience retail expenditure capacity that could service new retail floorspace in Dundee. The forecasts of spare capacity are for the period 2015- 21 and for the ten year period up to 2026, after allowing for the existing planning commitments.

8.1.2 When assessing spare capacity, much greater weight should be given to the forecast expenditure compared to the equivalent floorspace. The latter is merely indicative, as retail formats and turnover ratios vary considerably.

8.2 Definition

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

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

8.2.2 A range of spare capacity can be prepared from these components, showing a low and a high estimate, *after deducting planning commitments*. The **low estimate** includes any over-trading and the forecast growth in retained expenditure (turnover) in Dundee over the target periods. The **high estimate** also includes the potential to claw back leakage and attract new trade into Dundee. Provision of a range of spare capacity normally reduces the need for sensitivity tests.

8.2.3 ‘Acceptable’ levels of retail impact refer to the situation where new developments would not threaten the vitality and viability of established centres. By convention, this aspect is not usually embraced into capacity studies, because it is normally addressed by retail impact assessments in support of specific retail planning applications.

8.3 Spare convenience expenditure capacity

8.3.1 **Low estimates**- Table 8.1 shows the forecast spare convenience expenditure in Dundee up to 2026, after deducting the planning commitments. It amounts to some £76 million, which equates to around 6,700 sq m net of supermarket floorspace over the next ten years. It could support additional superstore development, but in the current market, the operators are more likely to seek small/ medium sized stores of up to around 1,300 sq m net and small store developments of up to around 300 sq m net. The former would include discount foodstores for example and the latter would include local convenience stores run by the major operators and also small independent stores, including specialist food retailers and new corner shops generally.

8.3.2 **High estimates**- the outflows from Dundee are very low and it is unlikely that new convenience developments in Dundee would claw back significant leakage. While the inflows are substantial, there is no reason to suppose that these levels would increase much, given the localised nature of convenience shopping and the market trend towards smaller convenience store formats. This assumption is reflected in the very low potential to increase inflows shown in Table 8.1.

8.3.3 Accordingly, it is not assumed that the high estimate of capacity (£81.1million) would be much more than the low estimate, given that there is little appetite for large supermarket or superstore developments, which would otherwise be capable of increasing inflows and reducing leakage.

8.4 Implications

8.4.1 Dundee is already quite well served by main supermarkets and the number of discounters is increasing, along with the number of small format convenience stores run by the main operators. The forecast spare convenience capacity would certainly support additional small/ medium and small stores as described in paragraph 8.3.1, including extensions to existing stores and supermarkets, for example over the next ten years.

Table 8.1
Dundee: spare convenience expenditure capacity up to 2026 (in 2014 prices)

			2015-21 £million	2021-26 £million	2015-26 £million
(a) Current over-trading- Table 7.5			32.5		32.5
(b) Growth in retained expenditure (turnover)- Table 7.4			21.4	34.9	56.3
(c) Less planning commitments			-12.5		-12.5
Low estimate (a+b)			**41.4**	**34.9**	**76.3**
(d) Add: potential to reduce outflow	*2021*	*2026*			
Outflow £million- Table 7.4	-17.1	-18.2			
Potential to claw back up to 15% of leakage assumed			2.6	0.2	2.7
(e) Add: potential to increase inflow	*2021*	*2026*			
Inflow £million- Table 7.4	190.7	204.5			
Potential to increase inflows by up to nominal1% assumed			1.9	0.1	2.0
High estimate	a+b-c+d+e		**45.9**	**35.2**	**81.1**
Equivalent supermarket convenience floorspace					
			£ per sq m	£ per sq m	
* Turnover/ floorspace ratio			11,099	11,851	
			sq m net	sq m net	sq m net
Low			*3,700*	*2,900*	*6,700*
High			*4,100*	*3,000*	*7,100*

Note
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. Figures are rounded.
* The turnover ratio derives from the 2015 Retail Rankings for the average turnover ratio of Sainsbury's, Tesco, Morrisons and ASDA, at £10,637 per sq m. The ratio has been increased to relate to 2021 and 2026, based on turnover growth in Dundee from Table 7.4

9 Comparison expenditure and turnover

9.1 Introduction

9.1.1 This section examines the comparison expenditure and turnover relationships in Dundee.

9.1.2 As set out in section 7, the relationship between expenditure and turnover in any study area can be expressed simply as: *residents' expenditure potential plus inflows, minus outflows equals total turnover*. The estimated distribution of turnover within a study area has to correspond with the level and distribution of retail floorspace by type.

9.2 Dundee comparison expenditure potential

9.2.1 Table 9.1 shows the forecast comparison expenditure per capita for the Dundee Council area, based on Experian data commissioned for this study.

Table 9.1
Dundee residents' comparison expenditure per capita per annum (in 2014 prices)

2013 £	2015 £	2021 £	2026 £
2,907	3,204	3,840	4,512
**Excluding special forms of trading (SFT)- from survey*			
	2,564	2,863	3,364

Sources:
The original figure for 2013 is 2,904 in 2013 prices from Experian, for Dundee Council area. The figure shown above is in 2014 prices, based on price indices for 2013/ 2014 in *Experian Retail Planner Briefing Note 12- Appendix 4b*.
The forecast growth to 2015, 2021 and 2026 is based on the UK comparison expenditure per capita in *Experian Retail Planner Briefing Note 12- Appendix 4a.*

Deductions require to be made to allow for special forms of trading (SFT- internet expenditure ,mail order etc), which do not relate to comparison floorspace. Proportions for deduction are provided in *Experian Retail Planner Briefing Note 12* - Appendix 3-(adjusted SFT to remove proportion from stores). The Experian figures are low compared with the household survey findings for Dundee

2015	2021	2026
-12.5%	-15.9%	-15.9%

* Proportions from the NEMS household survey 2015, projected for 2021 and 2026 on rate of increase in Experian data above.

2015	2021	2026
-20.0%	-25.4%	-25.4%

Table 9.2
Dundee comparison expenditure potential (in 2014 prices)
Excluding special forms of trading

	2015 £ million	2021 £ million	2026 £ million
Dundee Council area	383.5	444.3	539.7

Note
Derived from Table 9.1 and the population projections in Table 2.1

9.2.2 Special forms of trading (SFT), including internet shopping, are removed from the expenditure per capita data, so that it relates to conventional shop floorspace. Based on the household survey findings, the proportions of internet retail spending by Dundee residents are higher than the UK average, so these proportions are reflected in Table 9.1, with the rate of increase in SFT projected forward from the UK based forecasts of increased SFT by Experian.

9.2.3 Forecasts of the total comparison expenditure potential of the residents of Dundee are shown in Table 9.2. The growth rate to 2026 is the result of combining projected population growth from Table 2.1 with the forecast growth in expenditure per capita.

9.3 Comparison expenditure patterns- Dundee & Angus

9.3.1 The household survey findings on comparison shopping patterns by Dundee and Angus residents on various goods categories are weighted and combined in Appendix 8 to provide evidence on all comparison shopping patterns shown in Table 9.3.

9.3.2 Examination of Table 9.3 shows that 95% of comparison shopping by Dundee residents is made in Dundee, with only 5% leakage to other destinations. Some 72% of comparison shopping by Angus residents is made in Dundee.

9.4 Comparison expenditure and turnover in Dundee

9.4.1 Table 9.4 shows the total comparison expenditure made in Dundee, by local residents plus inflows from Angus and the rest of the Dundee catchment, plus visitor spending.

Table 9.3
Most visited centre for all comparison shopping- Dundee primary catchment defined by local authority area

	Origin	
	Dundee	Angus
Destination		
Dundee	**95%**	**72%**
City Centre	*68%*	*60%*
The 3 Retail Parks	*17%*	*8%*
B&Q Kings Cross Road	*2%*	*1%*
Other Dundee stores	*8%*	*3%*
Angus	0%	17%
Perth	0%	0%
Other destinations	5%	11%
Total	100%	100%

Note
The above data relates to the weighted survey data and filtered to remove don't knows, don't buy, varies, internet and mail order. Respondents could name up to two most visited destinations. Figures rounded.

9.4.2 The comparison expenditure potential of the Angus residents is calculated in the same way as for Dundee, including the proportion made in Dundee as shown in Appendix 9.

9.4.3 Analysis of the Perth & Kinross Retail Study 2014, and the household survey supporting it, reveals that 23% of comparison expenditure by residents of the Perth City area and Strathmore combined is made in Dundee. This is shown in Appendix 10.

9.4.4 Analysis of the Fife Retail Capacity Study 2014 indicates that 41% of comparison expenditure by residents of East Fife is made in Dundee, as shown in Appendix 11. An estimate of visitor comparison expenditure in Dundee from beyond the primary and secondary catchment is included, with explanation in the table footnote.

Table 9.4
Dundee comparison expenditure and turnover (in 2014 prices)
Excluding special forms of trading

		2015 £ million	2021 £ million	2026 £ million
Dundee Council area		383.5	444.3	539.7
Add: inflows				
From Angus		207.4	221.7	260.8
From Perth City/ Strathmore		66.1	70.2	86.5
From East Fife		81.0	94.6	111.3
*From visitors	1.2%	4.4	5.1	6.2
Less: outflows				
From Dundee to other destinations	-5%	-19.2	-22.2	-27.0
Retained expenditure (turnover)		723.3	813.8	977.5

Note
* Source: Draft STEAM Report for Dundee 2014 - Dundee City Council. Page 15-Visitor expenditure on shopping in Dundee is £17.73million in 2014. Assumed split at 25% convenience and 75% comparision goods (R MacLean estimate).

9.4.5 From the expenditure patterns in Table 9.4, it is deduced that the total comparison turnover in Dundee is currently around £723 million, which is forecast to rise to nearly £978 million by 2026.

9.5 Comparison floorspace and turnover in 2015

9.5.1 The current distribution of comparison floorspace and turnover in Dundee is shown in Table 9.5. The floorspace derives from the Council's 2014 retail floorspace survey, similar to the method applied in the analysis of convenience turnover.

9.5.2 In Table 9.5, the distribution of turnover among the centres in Dundee is based on application of turnover/floorspace ratios to the net floorspace, all controlled to the *total* derived from the household interview surveys, including inflows of expenditure to Dundee as shown in Table 9.4. These are presented as the estimates of *actual* turnover.

9.5.3 The concept of average turnover ratios is less relevant for comparison retailing, because there is no domination of the market by relatively few operators, as occurs with convenience retailing.

9.5.4 Use of interview surveys alone to determine turnover usually exaggerates the turnover of the most popular destinations and understates, or omits the extent of turnover in other floorspace within a study area. Mostly this occurs because respondents to interview questionnaires focus on their most-visited centres.

9.5.5 The last column in Table 9.5 shows the turnover of the City Centre and the retail parks collectively, plus other shops from the household survey alone, plus the expenditure inflows to Dundee apportioned from Table 9.4, as shown in Appendix 12. It attributes an unrealistically high turnover to the City Centre, without fully accounting for the turnover of other comparison floorspace in Dundee. This last column in Table 9.5 is just for reference.

9.5.6 As shown in Table 9.5, the average comparison turnover/ floorspace ratio in the City Centre is £8,000 per sq m , which is quite high. Note that it was also high at over £7,500 per sq m for non- bulky goods in the 2006 Retail Study *(Table 6a)*, unadjusted for prices. It is unsurprising that the City Centre turnover level is high, because of Dundee's location and its high retention of expenditure from the catchment.

9.6 Retail warehouse floorspace and turnover

9.6.1 Table 9.6 shows the current operators in the three retail parks in Dundee, together with the floorspace and turnover. Other out of centre retail warehouses are also shown.

9.6.2 Comparison between the survey based turnover and average turnover levels for the City Centre, District centres, supermarkets etc can be made by viewing the last column of Table 7.5

Table 9.5
Dundee comparison retail floorspace and turnover 2015 (in 2014 prices)

	Area		(1) Estimated turnover		Turnover from
	sq m gross	sq m net	Turnover £ per sq m	Total £million	from survey only (2) £million
Dundee City Centre	**77,389**	**50,303**	**8,000**	**402.4**	566.2
District Centres-total	**26,056**	**15,634**		**51.8**	
Albert Street	1,927	1,156	3,000	3.5	
Broughty Ferry	8,902	5,341	3,800	20.3	
Hilltown	4,777	2,866	3,000	8.6	
Lochee	9,101	5,461	3,000	16.4	
Perth Road	1,349	809	3,800	3.1	
Corner shops	**20,137**	**12,082**	**2,700**	**32.6**	
Retail Parks- see Table 9.6	**51,640**	**41,312**		**134.3**	106.0
Other out of centre retail warehouse units	**15,156**	**12,125**		**24.1**	13.4
Out of centre supermarkets-(convenience floorspace)	**18,949**	**11,149**		**78.2**	
Tesco Extra, Kingsway West- total 10,100 sq m gross- 30% comp	3,030	1,667	6,391	10.7	
Tesco, Riverside Drive- total 7,814 sq m gross- 30% comp	2,344	1,407	6,391	9.0	
Tesco Extra, South Road- total 8,450 sq m gross- 40% comp	3,380	2,028	6,391	13.0	
ASDA, Myrekirk Road- total 8,295 sq m gross- 30% comp	2,489	1,493	7,584	11.3	
ASDA, Milton- total 9,067 sq m gross- 40% comp	3,627	2,176	7,584	16.5	
ASDA, Derwent Av/Kirkton- total 5,828 sq m gross- 20% comp	1,166	699	7,584	5.3	
Morrisons, Afton Way-total 8,175 sq gross- 20% comp	1,635	818	7,251	5.9	
Sainsbury's, Tom Johnston Rd- total 6,448 sq m gross-10% comp	645	387	6,432	2.5	
Aldi, Arbroath Road- total 2,526 sq m gross- 20% comp	505	379	9,458	3.6	
Lidl, South Road- total 1,286 sq m gross- 10% comp	129	96	5,051	0.5	
See Appendix 11					38.3
Total at average levels	**209,327**	**142,605**		**723.5**	
Total from survey- actual levels					**723.3**

Note: The small difference between the totals above can be ignored
Gross floorspace based on Dundee City Council 2014 survey. Convenience/ comparison splits are estimates by R MacLean, including consultations with individual store managements.
(1) Estimated turnover at actual levels
(2) Turnover levels derived from the household surveys for Dundee and Angus and from other surveys supporting the Perth & Kinross and Fife Retail Capacity Studies 2014. See apportionment in Appendix 11.

9.7 Comparison retail planning commitments

9.7.1 Table 9.7 shows the current comparison retail planning commitments in Dundee. The main commitment is for a major extension to the Overgate Centre, which will be of key importance to raising the level and offer of comparison shopping in the City Centre. It is assumed that the commitments could be developed and operational by 2021.

Table 9.6 **Retail Parks and other out of centre retail warehouses: comparison retail floorspace and turnover (in 2014 prices)**				
	Area		2015 (1) Estimated turnover	
	sq m gross	sq m net	Turnover £ per sq m	Total £million
Kingway West Retail Park				
Furniture Mountain	926	741	2,500	1.9
Homebase- DIY	5,552	4,442	1,405	6.2
Oak Furnitureland	926	741	4,000	3.0
SCS- furniture	926	741	2,724	2.0
Dreams- beds	926	741	1,822	1.3
Next Home- home furnishings	1,670	1,336	3,000	4.0
Currys & PC World- electrical goods/ computers	2,400	1,920	7,891	15.2
Dunelm Mill- home furnishings	3,479	2,783	2,648	7.4
Carpet Right	943	754	1,298	1.0
Hobbycraft	939	751	2,300	1.7
Wren- kitchens & bathrooms	935	748	1,200	0.9
DFS- furniture	1,400	1,120	5,711	6.4
Sofa Works (new unit replaced Pagazzi)	1,358	1,086	1,800	2.0
Harvey's- textiles & furniture	2,130	1,704	2,345	4.0
Maplins- electronics	701	561	7,548	4.2
*Halfords				
Boots- chemist	924	739	12,098	8.9
Toys R Us	3,222	2,578	2,035	5.2
Total	**29,357**	**23,486**		**75.3**
Kingway East Retail Park				
Wickes- DIY & hardware	2,436	1,949	2,365	4.6
Pets at Home	975	780	2,893	2.3
Ponden Mill- fabrics	665	532	2,600	1.4
Harry Corry Interiors- fabrics	1,386	1,109	1,800	2.0
B&M Home and Garden store	3,003	2,402	6,471	15.5
Total	**8,465**	**6,772**		**25.8**
Gallagher Retail Park				
Matalan- clothing	3,716	2,973	2,484	7.4
Brantano- shoes	697	558	2,000	1.1
TK Maxx- clothing	4,466	3,573	3,550	12.7
DW Sports- sports goods	2,185	1,748	2,300	4.0
Mothercare- baby clothing/ accessories	1,377	1,102	2,583	2.8
Next- clothing	1,377	1,102	4,680	5.2
Total	**13,818**	**11,054**		**33.2**
Other out of centre retail warehouse units				
B&Q, King's Cross Road	10,000	8,000	1,908	15.3
Poundstretcher, Lochee Road	1,127	902	1,225	1.1
Carpet King Warehouse, Ainslie St, Broughty Ferry	369	295	1,298	0.4
Sterling, South Road- furniture	3,660	2,928	2,500	7.3
Total	**15,156**	**12,125**		**24.1**
Total- all Dundee	**66,796**	**53,437**		**158.4**

Note
Source: Gross floorspace from the 2014 survey by the Council, summarised in the Retail Booklet 2014
The turnover/ floorspace ratios are based on the company averages in the Retail Rankings 2015, adjusted to 2015
* Halfords is classified as predominantly automotive sales, therefore is not included as comparison retailing.

Table 9.7
Comparison retail planning commitments in Dundee: floorspace and turnover (in 2014 prices)

	Floorspace sqm		2015 Turnover ratio £/sq m	2015 Turnover £million	*2021 Turnover £million
	gross	net			
15/00167/FULL Unit 3 The Stack (Sports Direct)	2,790	2,445	5,752	14.1	15.8
05/00815/FULL Overgate extension- total 20,000 sq m gross Assume 90% comparison floorspace and 10% service	18,000	11,700	8,200	95.9	107.9
11/00055/FULL New Life Services Centre, Whitfield- retail floorspace 1,150 sq m gross- assume 20% comparison	230	138	3,000	0.4	0.5
Total	21,020	14,283		110.4	124.2

Note
Gross floorspace data derives from the City Council
The Stack- sales floorspace from Committee Report and turnover ratio for Sports Direct is based on the 2015 Retail Rankings
The net floorspace and turnover ratios for the other commitments are estimates by Roderick MacLean Associates
* Allowance for turnover growth 2015-21 is based on the forecast turnover growth in Dundee in Table 9.4; a factor of 1.12508

10 Spare comparison expenditure capacity to 2026

10.1 Introduction

10.1.1 This section provides estimates of the spare comparison retail expenditure capacity that could service new retail floorspace in Dundee. The forecasts of spare capacity are for the period 2015- 21 and for the ten-year period up to 2026, after allowing for the existing planning commitments.

10.1.2 When assessing spare capacity, much greater weight should be given to the forecast expenditure compared to the equivalent floorspace. The latter is merely indicative, as retail formats and turnover ratios vary considerably.

10.2 Definition

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

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

10.2.2 A range of spare capacity can be prepared from these components, showing a low and high estimate, *after deducting planning commitments*. The **low estimate** includes any over-trading and the forecast growth in retained expenditure (turnover) in Dundee over the target periods. The **high estimate** also includes the potential to claw back leakage and attract new trade into Dundee. Provision of a range of spare capacity normally reduces the need for sensitivity tests.

10.2.3 ‘Acceptable’ levels of retail impact refer to the situation where new developments would not threaten the vitality and viability of established centres. This concept has not been included, as explained in section 8.

10.3 Spare comparison expenditure capacity

10.3.1 **Low estimates**- Table 10.1 shows the forecast spare comparison expenditure in Dundee up to 2026, after deducting the planning commitments. It amounts to some £130 million, which equates to around 15,100 sq m net of City Centre floorspace over the next ten years. However, within the first five years, the forecast capacity to 2021 does not entirely support the commitments.

10.3.2 However, under the low estimates, significant additional comparison floorspace in the City Centre, or in other locations, could be supported after 2021.

10.3.3 **High estimates**- the outflows from Dundee are very low and it is unlikely that new comparison developments in Dundee would claw back significant levels of leakage. While the inflows are substantial, the potential to increase the inflows appears quite modest, as indicated by the assumptions shown in Table 10.1, the forecast spare capacity of around £205 million by 2026 would support up to 19,500 sq m net of new comparison floorspace in the City Centre up to 2026.

10.3.4 The level of floorspace will be more if split amongst other locations in Dundee. The high-end forecasts of comparison expenditure capacity could be realised in Dundee more readily than the high end convenience capacity forecasts, including within the period up to 2021.

10.3.5 Another possible scenario is the the proportion of internet spending on comparison goods rises above the levels predicted in this report, which would reduce the demand for new retail floorspace.

10.4 Implications

10.4.1 The forecast spare comparison expenditure capacity in Dundee is supportive of the existing comparison retail commitments. The potential to support additional comparison floorspace requires to be directed to opportunities within the network of centres and the associated policy restrictions on out of centre developments and ranges of goods that can be sold in retail parks. Failure to achieve this risks weakening the established centres which would be counterproductive.

Table 10.1 **Dundee: spare comparison expenditure capacity up to 2026 (in 2014 prices)**					
			2015-21 £million	2021-26 £million	2015-26 £million
(a) Growth in retained expenditure (turnover)- Table 9.4			90.5	163.7	254.2
(b) Less planning commitments			-124.2		-124.2
Low estimate (a+b)			**-33.8**	**163.7**	**129.9**
(c) Add: potential to reduce outflow	*2021*	*2026*			
Outflow £million- Table 9.4	-22.2	-27.0			
Potential to claw back up to 20% of leakage assumed			4.4	1.0	5.4
(d) Add: potential to increase inflow	*2021*	*2026*			
Inflow £million- Table 9.4	391.7	464.8			
Potential to increase inflows by up to 15% assumed			58.8	11.0	69.7
High estimate	a-b+c+d		**29.4**	**175.6**	**205.1**
Equivalent City Centre comparison floorspace					
			£ per sq m	£ per sq m	
* Turnover/ floorspace ratio			9,001	10,811	
			sq m net	sq m net	sq m net
Low			*0*	*15,100*	*15,100*
High			*3,300*	*16,200*	*19,500*

Note
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely.
* The turnover ratio derives from the current City Centre turnover ratio (£8,000 per sq m). The ratio has been increased to relate to 2021 and 2026, based on turnover growth in Dundee from Table 9.4

11 Policy issues and implications of the research

11.1 Introduction

11.1.1 This section reviews the implications of the research for future retail planning policies in the forthcoming second Dundee LDP. It includes specific issues mentioned in the consultancy brief on the restrictions of goods types that can be sold in retail parks and the prospects for specialist retailing within the central Waterfront development.

11.2 Forecast spare retail capacity

11.2.1 The range of forecast spare convenience expenditure capacity over the next ten years in Table 8.1 would support additional supermarket development, but this is more likely to take the form of smaller stores, rather than more superstores, unless the market changes again. The potential to support additional convenience floorspace requires to be directed to opportunities within the network of centres and the associated policy restrictions on out of centre developments. Failure to achieve this risks weakening the established centres which would be counterproductive.

11.2.2 In general, smaller stores are more likely to be capable of being accommodated within or adjacent to the City Centre or the District Centres, or following that, in the Commercial Centres according to the sequential test and the network of centres. Any emerging proposals to locate smaller convenience stores in the retail parks should be assessed rigorously under the sequential test, to avoid undermining the established centres, given the trends in the public's usage of smaller convenience stores.

11.2.3 The range of forecast spare comparison expenditure potential over the next ten years would support the proposed Overgate expansion, but not fully within the first five years. Nevertheless, the proposed expansion is likely to have a long lead-in time as market demand lags behind the expenditure potential, so weight should not be given to initial limits on forecast capacity. The forecasts of spare capacity would also support further additional comparison retail floorspace over the ten-year period, with proposals being assessed against the sequential test and network of centres. The policy presumption against out of centre comparison retail development and the associated range of goods restrictions in the retail parks needs to be applied in order to avoid the risk of weakening the established centres.

11.3 Policy 20- City Centre and Waterfront

11.3.1 The research does not indicate that any material change to this policy is required with regard to the Retail Frontage Area, the Speciality Shopping and Non Frontage Area and the City Centre extending and upgrading, including support for the Overgate extension and additions to the Wellgate Centre.

11.3.2 Policy 20 also includes support for the provision of small scale, specialist retailing in the Waterfront Masterplan to serve local people and visitors. Our advice is that market demand to occupy such units is more likely to be stronger from the non-retail services sector (restaurants, cafes, bars), compared to demand from retailers. Many small boutique style shops serving visitors and others are more likely to seek cheaper premises in an established area, say within secondary parts of the City Centre. However, these types of shops, including small distinctive restaurants and cafés, would have potential to add to the visitor experience associated with the arrival of the V&A, thus reinforcing the Waterfront as a 'destination'. Some of these types of operator may be unlikely to afford this location and intervention may be needed to attract them.

11.4 Policy 21- District Centres

11.4.1 No material change to the existing policy has emerged from the research, including the review of the District Centres in section 6. We suggest the Council may wish to review the frontages in Hilltown, in view of our comments.

11.5 Policy 22- The Stack

11.5.1 The current policy provides that new retail proposals need to complement the Lochee District Centre. It might benefit from strengthening by making it clear that open Class 1 retailing is not an option.

11.6 Policy 23- goods range restrictions in the Commercial Centres

11.6.1 This policy restricts the range of goods to be sold in the retail parks according the ranges specified in Appendix 4 of the LDP. It appears to have worked quite successfully over the years, with bulky goods at the two Kingsway Retail Parks and mostly City Centre related goods at the Gallagher Retail Park.

11.6.2 Our advice is that Policy 23 should remain, as any dilution of the restrictions is likely to result in competition with the City Centre and the District Centres. With the proposed extension to the Overate, retention of this policy is especially important, as even a suggestion of weakened resolve could potentially threaten / delay market interest in the Overgate.

11.6.3 It is common for investors and developers to seek relaxation of goods range restrictions on retail parks to increase market values of their properties. In some cases, arguments are made that particular retail formats are ‘special’ and that the proposed occupier would not come (to Dundee for example) if permission is not given. Policy 23 already provides direction with regard to ‘exceptional cases’, which allows arguments of this nature to be tested. There may be some benefit if more detail is provided within the supporting statements to the Policy, perhaps referring to the adverse consequences of non-enforcement, such as deflection of demand from the established centres.

11.6.4 There is no particular reason to change the restrictions on the proportions of comparison goods sales in supermarkets and superstores. Changes in the market and internet retailing have largely reduced the potential threat of too much comparison floorspace competing with established centres.

11.7 Policy 24- location of new retail developments

11.7.1 No need for change emerging from the research.

11.8 Policy 25- Gallagher Retail Park extension

11.8.1 No need for change emerging from the research.

11.9 Policy 26- local shopping provision

11.9.1 The Council may wish to review the maximum sizes of the shop floorspace referred to in this policy, to perhaps increase these slightly to ensure retailers with modern formats are attracted.

Appendix 1

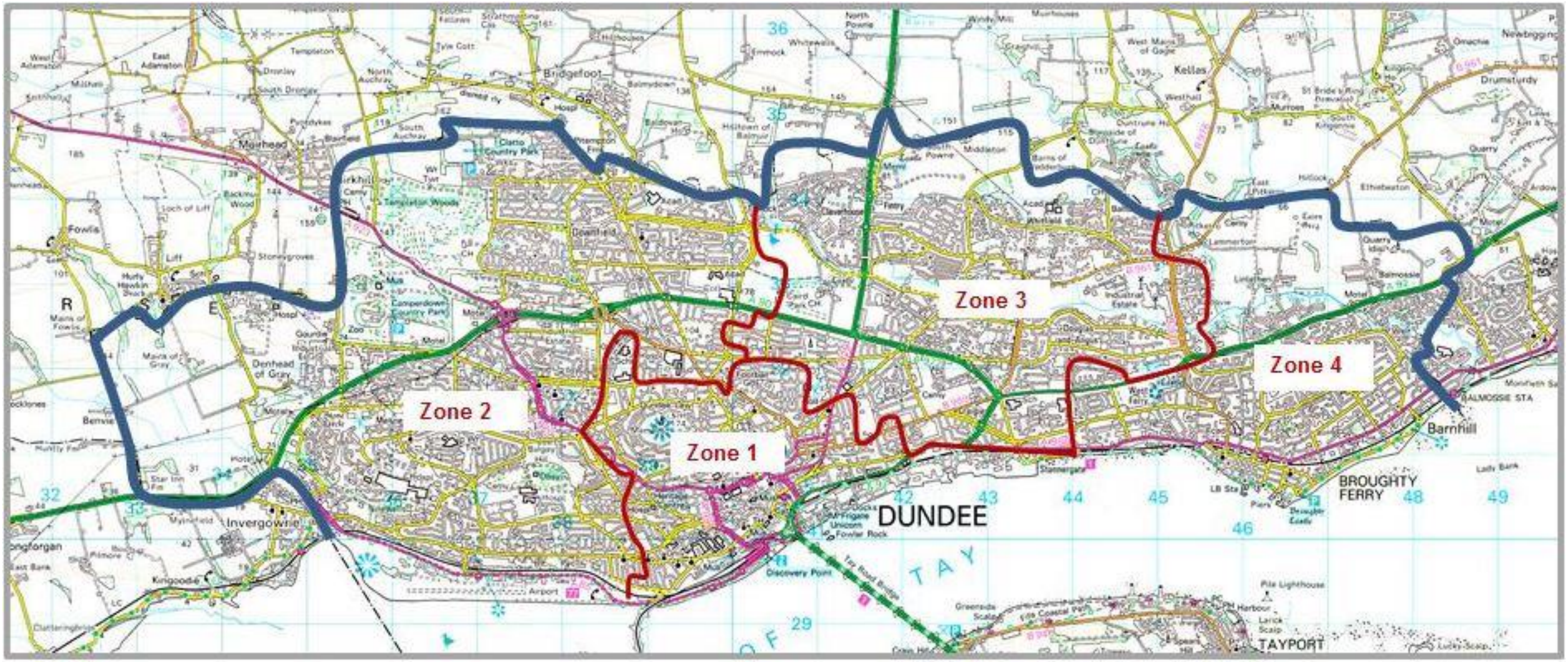
Household Survey- list of questions

Q01	Where did you last do your MAIN FOOD shopping for the household?
Q01A	Which internet retailer did you use on that trip? Those who said Internet at Q01
Q02	Where did you last go the time before that to do your MAIN FOOD shopping? Was it the same or different, please specify
Q02A	Which internet retailer did you use on that trip? Those who said Internet at Q02
Q03	Where did you last go to do small, day-to-day TOP-UP food shopping?
Q03A	Which internet retailer did you use on that trip? Those who said Internet at Q03
Q04	On average, how often do you do your MAIN food shopping?
Q05	On average, how often do you do your TOP-UP food shopping?
Q06	Could you tell me what other things you usually combine with doing your MAIN food shopping?
Q07	Where do you visit most often to buy clothes, shoes and other fashion items?
Q08	Where do you visit most often to buy furniture, floor coverings and soft furnishings?
Q09	Where do you visit most often to buy large domestic electrical appliances such as fridges, washing machines, vacuum cleaners etc?
Q10	Where do you visit most often to buy DIY and hardware?
Q11	Where do you visit most often to buy other items of a mainly personal nature, such as sports goods, jewellery, books, toys, CD's, computers, mobiles, cameras, electronic games etc?
Q12	How often do you use the Internet for buying non-food goods such as personal items and household goods?
Q13	What is the main reason why do you never do non-food shopping via the Internet?
Q14	Thinking about Internet shopping for non-food items such as personal items and household goods, what do you like most about shopping on the Internet?
Q15	Looking to the future, how frequently do you intend to use the Internet for non-food shopping?
Q16	Thinking about Dundee City Centre, how often do you visit it, on average?
Q17	How do you normally travel to the City Centre?
Q18	What typically, are your main reasons for visiting the City Centre (i.e. what range of things do you do when you get there)?
Q19	On average, how long do you normally spend in the City Centre when you visit?
Q20	What do you LIKE MOST about the City Centre for shopping and as a place to visit generally?
Q21	What do you DISLIKE MOST about the City Centre for shopping and as a place to visit generally?
Q22	Overall, how do you rate the City Centre on the following aspects as 'Good', 'Average' or 'Poor'?
Q23	What improvements to the City Centre would make you visit there more often?
Q24	On average, how often do you visit the City Centre in the evenings (i.e. after 6pm)?
Q25	Do you undertake any of the following leisure related activities when you visit the City Centre in the evenings?
Q26	What would make you visit the City Centre more often in the evenings?
Q27	Why do you never visit Dundee City Centre?
Q28	Which one of the following smaller, District Shopping Centres do you use most often?
Q29	Thinking about (CENTRE MENTIONED AT Q28), on average, how often do you visit it?
Q30	Overall, how do you rate (CENTRE MENTIONED AT Q28) on the following aspects, as 'Good', 'Average' or 'Poor'?
Q31	What improvements to (CENTRE MENTIONED AT Q28) would make you visit there more often?
GEN	Gender of respondent.
AGE	Which of the following age ranges do you fall in to?
OCC	What is the occupation of the chief income earner in your household?
PC	Postcode of home address

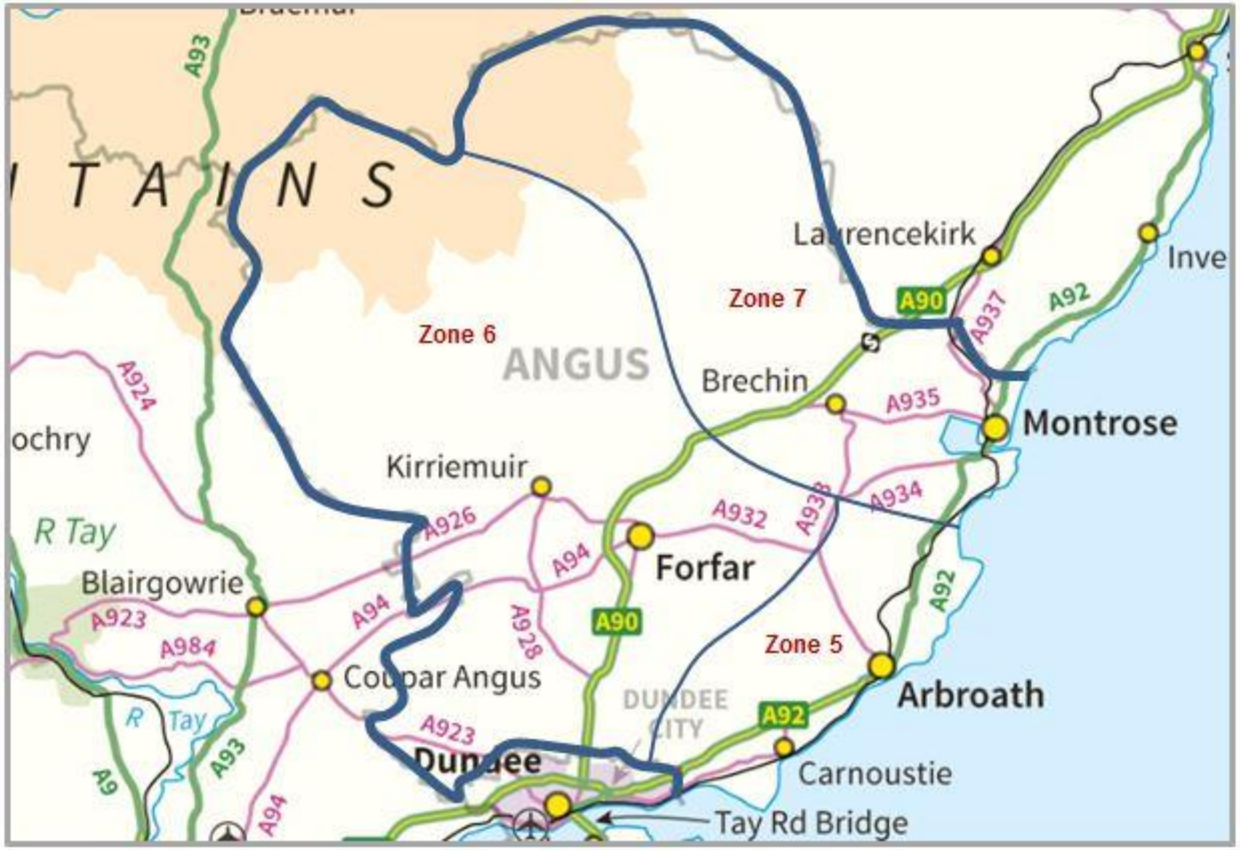
Appendix 2

Household Survey- zones and sample quotas

Dundee Retail Study 2015- household interview survey zones in Dundee- based on postcode sectors



Dundee Retail Study 2015- household interview survey zones in Angus- based on postcode sectors



	Dundee Zones				
Zone	**Postcode sector**	**Population 2011 Census**	**%**	**Survey Quotas**	**adjusted**
	Dundee				
1	DD1 1	1,318			
	DD1 2	2,109			
	DD1 3	1,547			
	DD1 4	3,545			
	DD1 5	5,200			
	DD3 6	7,699			
	DD3 7	7,043			
	DD4 6	6,818			
	Sub total	**35,279**	24%	156	**160**
2	DD2 1	8,558			
	DD2 2	8,214			
	DD2 3	6,883			
	DD2 4	10,458			
	DD2 5 *part in Dundee*	778			
	DD3 0 *part in Dundee*	6,077			
	DD3 8	6,527			
	DD3 9 *part in Dundee*	8,286			
	Sub total	**55,781**	38%	246	**230**
3	DD4 0 *part in Dundee*	6,323			
	DD4 7	7,863			
	DD4 8	10,867			
	DD4 9	10,830			
	Sub total	**35,883**	24%	158	**160**
4	DD5 1	4,679			
	DD5 2	6,445			
	DD5 3 *part in Dundee*	9,201			
	Sub total	**20,325**	14%	90	**100**
	Total Dundee	**147,268**	100%	**650**	**650**

Angus Zones					
Zone	**Postcode sector**	**Population 2011 Census**	**%**	**Survey Quotas**	*** adjusted**
	Angus				
5	DD5 3 *part in Angus*	3,329			
	DD5 4 *part in Angus*	8,366			
	DD7 6	5,281			
	DD7 7	7,020			
	DD11 1	5,851			
	DD11 2	5,331			
	DD11 3	4,137			
	DD11 4	7,490			
	DD11 5	6,067			
	Sub total	**52,872**	46%	160	**140**
6	DD2 5 *part in Angus*	3,576			
	DD3 0 *part in Angus*	1,353			
	DD4 0 *part in Angus*	1,049			
	DD8 1 *part in Angus*	7,999			
	DD8 2	7,077			
	DD8 3	6,090			
	DD8 4	4,361			
	DD8 5	3,577			
	PH11 5 *part in Angus*	351			
	PH12 8 *part in Angus*	1,101			
	Sub total	**36,534**	32%	110	**110**
7	DD9 6	5,111			
	DD9 7 *part in Angus*	5,423			
	DD10 8	7,194			
	DD10 9	8,780			
	AB30 1 *part in Angus*	64			
	Sub total	**26,572**	23%	80	**100**
	Total Angus	**115,978**	100%	**350**	**350**

Note

* The adjusted quotas allow for a minimum sanple size of 100

Appendix 3

Convenience shopping patterns by Dundee and Angus residents

Market shares based on the household survey

Q1&Q2 combined: Where visited last, and the time before that, to do main food shopping		
	Origin	
	Dundee	Angus
Destination		
All Dundee	*94%*	*23%*
City Centre	*9%*	*1%*
5 District Centres	*3%*	*1%*
Dundee ASDA/ Tesco/Morrisons/Sainsbury's- (out of centre)	*61%*	*17%*
Other Dundee shops	*22%*	*4%*
Angus	6%	77%
Perth	0%	0%
Other destinations	0%	0%
Total	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, don't buy, varies, internet and mail order. Respondents could name up to tw o most visited destinations. Figures rounded

Q3 Where did you last go to do small, day-to day top up food shopping		
	Origin	
	Dundee	Angus
Destination		
All Dundee	*97%*	*14%*
City Centre	*16%*	*1%*
5 District Centres	*9%*	*1%*
Dundee ASDA/ Tesco/Morrisons/Sainsbury's- (out of centre)	*33%*	*9%*
Other Dundee shops	*39%*	*3%*
Angus	2%	86%
Perth	0%	0%
Other destinations	1%	0%
Total	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, don't buy, varies, internet and mail order. Respondents could name up to tw o most visited destinations. Figures rounded

Dundee and Angus convenience shopping patterns- Q1/Q2/Q3 combined		
	Origin	
	Dundee	Angus
Destination		
All Dundee	*95%*	*22%*
City Centre	*10%*	*1%*
5 District Centres	*4%*	*1%*
Dundee ASDA/ Tesco/Morrisons/Sainsbury's- (out of centre)	*55%*	*16%*
Other Dundee shops	*25%*	*4%*
Angus	5%	*78%*
Perth	0%	0%
Other destinations	0%	0%
Total	100%	100%

Note

The w eighting assiumes 80%:20% main food: top shopping

Appendix 4

Convenience expenditure from Angus to Dundee

Table A1
Angus residents' convenience expenditure per capita per annum (in 2014 prices)

2013 £	2015 £	2021 £	2026 £
2,400	2,400	2,477	2,569
**Excluding special forms of trading (SFT)*			
	2,333	2,368	2,440

Sources:
The original figure for 2013 is 2,365 in 2013 prices from Experian, for the Angus Council area. The figure show n above is in 2014 prices, based on price indices for 2013/ 2014 in *Experian Retail Planner Briefing Note 12- Appendix 4b.*
The forecast grow th to 2015, 2021 and 2026 is based on the UK convenience expenditure per capita in *Experian Retail Planner Briefing Note 12- Appendix 4a.*

Deductions require to be made to allow for special forms of trading (SFT- internet expenditure ,mail order etc), w hich do not relate to convenience floorspace. The proportions deducted derive from *Experian Retail Planner Briefing Note 12* - Appendix 3-(adjusted SFT to remove proportion from stores).

2015	2021	2026
-2.8%	-4.4%	-5.0%

Table A2
Angus residents' convenience expenditure potential (in 2014 prices)
Excluding special forms of trading

		2015 £ million	2021 £ million	2026 £ million
Angus Council area		271.2	276.4	285.1
Outflows to Dundee	22%	58.7	59.8	61.7

Note
Based on Table A1 applied to the population in Table 2.1, w ith the outflow s to Dundee from Appendix 3

Appendix 5

Convenience expenditure from Perth and Strathmore to Dundee

Table A3 **Perth & Kinross residents' convenience expenditure per capita per annum (in 2014 prices)**					
2012 £	2015 £	**2018** £	2021 £	**2023** £	2026 £
In 2012 prices ***2,119***	*2,083*	***2,047***	*2,048*	***2,049***	*2,050*
In 2014 prices	2,201		2,164		2,166
**Excluding special forms of trading (SFT)*					
In 2014 prices	2,139		2,069		2,058

Sources:
Figures in bold are from the Pitney Bow es' projected expenditure data in the Perth & Kinross Retail Capacity Study 2014. Figures for the the othe years are interpolations/ extrapolations for the Dundee Study. No change betw een 2012 and 2014 prices
The Perth & Kinross Retail Study is in 2012 prices. These are converted to 2014 prices from Appendix 4b of Experian Retail Planner Briefing Note 12.1, by a factor of 1.0567
Deductions require to be made to allow for special forms of trading (SFT- internet expenditure ,mail order etc), w hich do not relate to comparison floorspace. The proportions deducted derive from Pitney Bow es Retail Expenditure Guide 2014/15, Table 3.1, w hich uipdates data from the previous Pitney Bow es Expenditure Guide applied in the Perth & Kinross Retail Capacity Study- for consistency.
w ith that Study.The proportion in 2026 is an extrapolation.

2015	2021	2024	2026
-2.1%	-2.3%	-2.3%	-2.3%

A4-1
Perth & Kinross residents' convenience expenditure potential- part within Dundee catchment (in 2014 prices)

(excluding special forms of trading) Sub area	2015 £ million	2021 £ million	2026 £ million
Perth- *City & hinterland*	320.1	321.1	330.1
Strathmore- *Blairgowrie & Coupar Angus*	248.8	241.5	240.4
Total	568.8	562.5	570.6

Note
Based on Table A3 applied to the population in Table 2.1

A4-2
Perth- *City & hinterland* : convenience expenditure and outflows to Dundee (in 2014 prices)

	%	2015 £million	2021 £million	2026 £million
Main catchment residents' expenditure potential		320.1	321.1	330.1
Outflows to Dundee	10%	33.1	33.3	34.1
Outflow s from Perth & Kinross Retail Study 2014				

A4-3
Strathmore & The Glens- *Blairgowrie & Coupar Angus* : convenience expenditure and outflows to Dundee (in 2014 prices)

	%	2015 £million	2021 £million	2026 £million
Main catchment residents' expenditure potential		248.8	247.3	241.5
Outflows to Dundee	8%	20.7	20.6	20.1
Outflow s from Perth & Kinross Retail Study 2014				

A4-4
Perth *(City & hinterland)* and Strathmore (B*lairgowrie & Coupar Angus)* : combined convenience expenditure and outflows to Dundee (in 2014 prices)

	%	2015 £million	2021 £million	2026 £million
Perth City & Strathmore residents' expenditure potential		568.8	568.4	571.6
Outflows to Dundee	9%	53.8	53.9	54.3
Outflow s from Perth & Kinross Retail Study 2014				

Appendix 6

Convenience expenditure from East Fife to Dundee

Table A5 **East Fife residents' convenience expenditure potential (in 2014 prices)**				
	2015 £	2021 £	2024 £	2026 £
***East Fife expenditure per capita in 2012 prices**	*2,151*	*2,256*	*2,311*	*2,348*
less: Special Forms of Trading (SFT)	-2.8%	-4.4%		-5.0%
Expenditure per capita in 2012 prices	*2,091*	*2,157*		*2,231*
Expenditure per capita in 2014 prices	2,209	2,279		2,357
	£million	£million		£million
Total expenditure in 2014 prices	587.4	619.6		653.6

* From Table 2.1 in Appendix B in The Fife Retail Capacity Study 2014. The figure for 2026 is an extrapolation for the Dundee Study.
In Table 2.2 of The Fife Retail Capacity Study, forecasts of the proportions of SFT deducted have been updated from the more recently published *Experian Retail Planner Briefing Note 12* - Appendix 3 (adjusted SFT to remove proportion from stores). The above proportions are estimated by Experian.
The Fife Retail Capacity Study is in 2012 prices. These are converted to 2014 prices from Appendix 4b of Experian Retail Planner Briefing Note 12.1, by a factor of 1.0567

Table A6 **East Fife : convenience expenditure and outflows to Dundee (in 2014 prices)**				
	%	2015 £million	2021 £million	2026 £million
East Fife residents' expenditure potential		587.4	619.6	653.6
Total outflows to Dundee	12%	70.5	74.4	78.4

Note
East Fife convenience expenditure from previous table
The outflow s derive from the 2009 NEMS survey for Fife, w hich underpinned the 2010 Fife Retail Capacity Study
The NEMS data indicated 34% leakage of convenience spending from East Fife in total. Within this proportion, 16% w ent to Dundee.
In the Fife Retail Capacity Study 2014- Appendix B, the estimated net leakage is reduced to 20%, based on 25% leakage and 5% inflow . Accordingly the leakage to Dundee is apportioned by 25/34 multiplied by 16%= 12% to Dundee

Appendix 7

Distribution of convenience turnover in Dundee from the surveys

Distribution of turnover within Dundee based on the household survey and surveys in other local authority areas, plus visitor spending.

Destination	% spend by Dundee residents	Spend by Dundee residents £million	% spend by Angus residents	Spend by Angus residents £million	Spend by P & K residents £million	Spend by E Fife residents £million	Spend by visitors £million	Total £million
City Centre	10%	32.8	1%	2.2	2.7	3.5	0.8	41.9
5 District Centres	4%	12.6	1%	3.0	2.7	3.5		21.9
Dundee Supermarkets (o/c)	55%	179.2	16%	43.2	40.4	52.9	1.9	318.2
Other Dundee shops	25%	82.3	4%	11.4	8.1	10.6		112.6
Total spent in Dundee	95%	306.9	22%	59.8	53.8	70.5	2.7	494.7

	£million	
Dundee residents' expenditure potential in 2015	324.3	
Angus residents' expenditure potential in 2015	276.4	Estimates of distribution
Inflows to Dundee from Perth & Kinross	53.8	5% to City Centre, 5% to District Centres,75% to supermarkets, 15% to other shops
Inflows to Dundee from East Fife	70.5	5% to City Centre, 5% to District Centres,75% to supermarkets, 15% to other shops
Visitor spend in Dundee	2.7	30% to City Centre,70% to supermarkets

This table underpins the summary estimates of the distribution of turnover from the surveys in Table 7.5

Appendix 8

Comparison shopping patterns by Dundee and Angus residents

Market shares based on the household survey by category of goods

Q7 Most visited centre for clothes, shoes and other fashion items

	Origin	
	Dundee	Angus
Destination		
All Dundee	95%	75%
City Centre	*86%*	*72%*
The 3 Retail Parks	*7%*	*1%*
Angus	0%	10%
Perth	1%	1%
Other destinations	4%	14%
Total	100%	100%

Note

The above data relates to the weighted survey data and filtered to remove don't knows, don't buy, varies, internet and mail order. Respondents could name up to two most visited destinations. Figures rounded

Q8 Most visited centre for furniture, floorcoverings and soft furnishings

	Origin	
	Dundee	Angus
Destination		
All Dundee	92%	66%
City Centre	*32%*	*36%*
The 3 Retail Parks	*46%*	*21%*
Angus	0%	23%
Perth	1%	0%
Other destinations	8%	11%
Total	100%	100%

Note

The above data relates to the weighted survey data and filtered to remove don't knows, don't buy, varies, internet and mail order. Respondents could name up to two most visited destinations. Figures rounded

Q9 Most visited centre for large domestic electrical applicances, such as fridges, washing machines, vacuum cleaners etc

	Origin	
	Dundee	Angus
Destination		
All Dundee	99%	60%
City Centre	*26%*	*23%*
The 3 Retail Parks	*70%*	*34%*
Angus	1%	34%
Perth	0%	0%
Other destinations	0%	7%
Total	100%	100%

Note
The above data relates to the weighted survey data and filtered to remove don't knows, don't buy, varies, internet and mail order. Respondents could name up to two most visited destinations. Figures rounded

Q10 Most visited centre for DIY and hardware

	Origin	
	Dundee	Angus
Destination		
All Dundee	100%	60%
City Centre	*13%*	*17%*
The 3 Retail Parks	*14%*	*8%*
B&Q Kings Cross Road	*72%*	*35%*
Angus	0%	37%
Perth	0%	0%
Other destinations	0%	2%
Total	100%	100%

Note
The above data relates to the weighted survey data and filtered to remove don't knows, don't buy, varies, internet and mail order. Respondents could name up to two most visited destinations. Figures rounded

Q11 Most visited centre for other items of a mainly personal nature

	Origin	
	Dundee	Angus
Destination		
All Dundee	96%	73%
City Centre	*71%*	*64%*
The 3 Retail Parks	*14%*	*7%*
Angus	0%	17%
Perth	0%	0%
Other destinations	4%	10%
Total	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, don't buy, varies, internet and mail order. Respondents could name up to tw o most visited destinations. Figures rounded

Weighting - *from Experian expenditure per capita data for Dundee and for Angus Council areas- 2013*
All comparison shopping

	Dundee	Angus
Clothing, shoes and fashion	33.3%	31.6%
Furniture, floorcoverings & furnishings	12.1%	13.0%
Large domestic appliances	2.8%	2.8%
DIY and hardware	3.4%	4.2%
Personal goods	48.5%	48.5%
Total comparison expenditure	100.0%	100.0%
Comparison expenditure per capita in 2013	£2,904	£3,170

Most visited centre for all comparison shopping- Dundee primary catchment defined by local authority area

	Origin	
	Dundee	Angus
Destination		
Dundee	**95%**	**72%**
City Centre	*68%*	*60%*
The 3 Retail Parks	*17%*	*8%*
B&Q Kings Cross Road	*2%*	*1%*
Other Dundee stores	*8%*	*3%*
Angus	0%	17%
Perth	0%	0%
Other destinations	5%	11%
Total	100%	100%

Note
The above data relates to the w eighted survey data and filtered to remove don't know s, don't buy, varies, internet and mail order. Respondents could name up to tw o most visited destinations. Figures rounded.

Appendix 9

Comparison expenditure from Angus to Dundee

Table A1
Angus residents' comparison expenditure per capita per annum (in 2014 prices)

2013 £	2015 £	2021 £	2026 £
3,173	3,498	4,192	4,926
**Excluding special forms of trading (SFT)- from survey*			
	2,482	2,643	3,106

Sources:
The original figure for 2013 is 3,170 in 2013 prices from Experian, for the Angus Council area. The figure show n above is in 2014 prices, based on price indices for 2013/ 2014 in *Experian Retail Planner Briefing Note 12- Appendix 4b*.
The forecast grow th to 2015, 2021 and 2026 is based on the UK comparison expenditure per capita in *Experian Retail Planner Briefing Note 12- Appendix 4a.*

Deductions require to be made to allow for special forms of trading (SFT- internet expenditure ,mail order etc), w hich do not relate to comparison floorspace. Proportions for deduction are provided in *Experian Retail Planner Briefing Note 12* - Appendix 3-(adjusted SFT to remove proportion from stores). The Experian figures are low compared w ith the household survey findings for Angus

	2015	2021	2026
	-12.5%	-15.9%	-15.9%

* Proportions from the NEMS household survey 2015, projected for 2021 and 2026 on rate of increase in Experian data above.

	2015	2021	2026
	-29.0%	-36.9%	-36.9%

Table A2
Angus residents' comparison expenditure potential (in 2014 prices)
Excluding special forms of trading

		2015 £ million	2021 £ million	2026 £ million
Angus Council area		288.6	308.5	362.8
Outflows to Dundee	72%	207.4	221.7	260.8

Note
Based on Table A1 applied to the population in Table 2.1, w ith the outflow s to Dundee from Appendix 7

Appendix 10

Comparison expenditure from Perth and Strathmore to Dundee

Table A3
Perth & Kinross residents' comparison expenditure per capita per annum (in 2014 prices)

2012	2015	**2018**	2021	**2023**	2026
£	£	£	£	£	£
3,058	3,295	**3,532**	3,837	**4,040**	4,379
**Excluding special forms of trading (SFT)*					
	2,672		2,966		3,326

Sources:
Figures in bold are from the Pitney Bow es' projected expenditure data in the Perth & Kinross Retail Capacity Study 2014. Figures for the the othe years are interpolations/ extrapolations for the Dundee Study. No change betw een 2012 and 2014 prices
Deductions require to be made to allow for special forms of trading (SFT- internet expenditure ,mail order etc), w hich do not relate to comparison floorspace. The proportions deducted derive from Pitney Bow es Retail Expenditure Guide 2014/15, Table 3.1, w hich uipdates data from the previous Pitney Bow es Expenditure Guide applied in the Perth & Kinross Retail Capacity Study- for consistency.
w ith that Study.The proportion in 2026 is an extrapolation.

2015	2021	2024	2026
-18.9%	-22.7%	-23.5%	-24.0%

Table A4-1
Perth & Kinross residents' comparison expenditure potential - part within Dundee catchment (in 2014 prices)

(excluding special forms of trading) Sub area	2015 £ million	2021 £ million	2026 £ million
Perth- City & hinterland	231.1	270.8	318.0
Strathmore- Blairgowrie & Coupar Angus	52.9	62.0	72.8
Total	284.0	332.8	390.8

Note
Based on Table A3 applied to the population in Table 2.1

Table A4-2
Perth- *City & hinterland* : comparison expenditure and outflows to Dundee (in 2014 prices)

	%	2015 £million	2021 £million	2026 £million
Main catchment residents' expenditure potential		231.1	270.8	318.0
Outflows to Dundee Retail Parks	2%	3.9	4.2	5.3
Outflows to Dundee City Centre	17%	40.2	43.2	55.3
Total outflows to Dundee		44.0	47.3	60.6

Outflow s from Perth & Kinross Retail Study 2014

Table A4-3
Strathmore & The Glens- *Blairgowrie & Coupar Angus*: comparison expenditure and outflows to Dundee (in 2014 prices)

	%	2015 £million	2021 £million	2026 £million
Main catchment residents' expenditure potential		52.9	54.7	62.0
Outflows to Dundee Retail Parks	8%	4.1	4.3	4.8
Outflows to Dundee City Centre	34%	18.0	18.6	21.1
Total outflows to Dundee		22.1	22.9	25.9

Outflow s from Perth & Kinross Retail Study 2014

Table A4-4
Perth *(City & hinterland)* and Strathmore (B*lairgowrie & Coupar Angus)* : combined comparison expenditure and outflows to Dundee (in 2014 prices)

	%	2015 £million	2021 £million	2026 £million
Perth City & Strathmore residents' expenditure potential		284.0	325.5	380.0
Outflows to Dundee Retail Parks	3%	8.0	8.4	10.2
Outflows to Dundee City Centre	20%	58.1	61.8	76.3
Total outflows to Dundee	23%	66.1	70.2	86.5

Outflow s from Perth & Kinross Retail Study 2014

Appendix 11

Comparison expenditure from East Fife to Dundee

Table A5
East Fife residents' comparison expenditure potential (in 2014 prices)

	2015	2021	2024	2026
	£	£	£	£
*East Fife expenditure per capita	3,352	3,980	4,336	4,591
less: Special Forms of Trading (SFT)	-12.5%	-15.9%		-15.9%
Expenditure per capita	2,933	3,347		3,861
	£million	£million		£million
Total expenditure	197.5	230.8		271.4

* From Table 2.1 in Appendix C in The Fife Retail Capacity Study 2014. The figure for 2026 is an extrapolation for the Dundee Study. In Table 2.2 of The Fife Retail Capacity Study, forecasts of the proportions of SFT deducted have been updated from the more recently published *Experian Retail Planner Briefing Note 12* - Appendix 3 (adjusted SFT to remove proportion from stores). The above proportions are 75% of the total SFT in each year- as estimated by Experian

The Fife Retail Capacity Study is in 2012 prices , but Appendix 4b of Experian Retail Planner Briefing Note 12.1 reveals no change betw een 2012 and 2014 prices

Table A6
East Fife : comparison expenditure and outflows to Dundee (in 2014 prices)

	%	2015 £million	2021 £million	2026 £million
East Fife residents' expenditure potential		197.5	230.8	271.4
Total outflows to Dundee	41%	81.0	94.6	111.3

Note

East Fife comparison expenditure from previous table

The outflow s derive from the 2009 NEMS survey for Fife, w hich underpinned the 2010 Fife Retail Capacity Study

The NEMS data indicated 80% leakage of comparison spending from East Fife in total. Within this proportion, 51% w ent to Dundee.

In the Fife Retail Capacity 2010, the estimated total leakage based on the NEMS survey w as reduced to 65%. This proportion reappears in the Fife Retail Capacity Study 2014- Appendix C. So the outflow s in the above table are adjusted accordingly:

65% multiplied by 51/80 = 41% to Dundee

Appendix 12

Distribution of comparison turnover in Dundee from the surveys

Distribution of turnover within Dundee based on the household survey and surveys in other local authority areas, plus visitor spending.

Destination	% spend by Dundee residents in Dundee	Spend by Dundee residents £million	% spend by Angus residents in Dundee	Spend by Angus residents £million	Spend by P & K residents £million	Spend by E Fife residents £million	Spend by visitors £million	Total £million
City Centre	68%	260.2	60%	172.8	58.1	71.2	4.0	566.2
The 3 Retail Parks	17%	64.5	8%	23.2	8.0	9.8	0.4	106.0
B&Q Kings Cross Road	2%	9.3	1%	4.1				13.4
Other Dundee stores	8%	30.9	3%	7.4				38.3
Total spent in Dundee	95%	364.9	72%	207.4	66.1	81.0	4.4	723.9

	£million	
Dundee residents' expenditure potential in 2015	383.5	
Angus residents' expenditure potential in 2015	288.6	Estimates of distribution
Inflows to Dundee from Perth & Kinross	284.0	Just City Centre and retail parks identified
Inflows to Dundee from East Fife	81.0	Assume distribution as for Perth & Kinross
Visitor spend in Dundee	2.7	Assume 90% to City Centre,10% to retail parks

Appendix 13

List of retail lettings in Dundee 2014/15

Address	Size (sq.m.)	Details
22 Union Street	74	Let in June 2015 to Carnabys Ltd on a three year lease at £13,000 pa
Unit 4a Kingsway West Retail Park	1,254	Let in March 2015 to Sofaworks Ltd on a 15-year lease, subject to five yearly rent reviews and an option to break in year ten
13-17 Exchange Street	38	Let in March 2015 to Kara Swankie t/a Swankie Jo's on a three year lease at £5,000
80 Nethergate	95	Let in February 2015 to Aroma Beans 2 on a 10-year lease at £20,000 pa
17 Whitehall Crescent	74	Let in January 2015 to Refresh Skin Clinic Ltd on a five year lease at £13,000 pa
125 Nethergate	56	Let in January 2015 to Clark's Bakery on a five year lease at £12,000 pa
63 Perth Road	109	Let in Novermber 2014 to Mr Reid t/a Baked on a 10 year lease at £10,000 pa.
4 Commercial Street	41	Let in October 2014 to Rudy Knight t/a Ruby Rags on a one year lease at £8,000 pa
40 Murraygate	266	Let in October 2014 to British Heart Foundation on a 10-year lease at £57,500 pa in years one and two, rising to £60,000 pa in year three, subject to a rent review and a tenant-only option to break in year five
11 Hawkhill	306	Let in October 2014 to Rishi's Indian Aroma on a 10 year lease at £45,000 pa
48-54 Reform Street	388	Let in August 2014 to Project Pie on a new 20 year lease at an initial stepped rent of £40,000 pa
11 Union Street	122	Sub-let in July 2014 to The Palais Tearoom at £16,000 pa
7 Victoria Road	84	Let in June 2014 to Killer Kouture Ltd on a five year lease at £8,000 pa, subject to a tenant option to break at year end. The Zone A rent is £9.22 per sq.ft., equated from an ITZA of 868 sq.ft.
61-63 Murraygate	649	Let in May 2014 to A Levy & Son Ltd t/a Officers Club on a new 10 year FRI lease at £70,000 pa, equating to a Zone A rent of £40 per sq.ft.
Stack Leisure Park	4,831	Let in April 2014 to The Range from Tesco Stores Ltd on confidential terms

Source: Ryden

Appendix 14

List of recent retail property investment transactions in Dundee

Address	Details
138 High Street	In October 2014 a private investor purchased the 731 sq.m. retail unit from a private vendor for £460,000 (16.12%.). Tenants are SSE, Superdrug & Beauty Concessions.
24-26 St Andrew Street	In June 2014 Westport Ltd purchased 192 sq.m. of retail space as an investment.
1-15 Reform Street	In June 2014 CH Holdings Ltd purchased 255 sq.m. of retail space from Union Land Management Ltd for £1.47m (9.32%). Let to H Samuel Ltd
Overgate Shopping Centre	In March 2014 Legal & General Property Ltd (obo its UK PIF II fund) purchased the long leasehold interest from Land Securities plc for £125.3m(7.54%). Retailers are noted in the commentary above. The majority of the property is held on a 179-year lease from Dundee City Council for a term expiring on the 31st December 2177.
70-73 High Street	In June 2013 the Offerhappy Limited Pension Scheme purchased 33 sq.m. of retail space from Burgundy Holdings Ltd for £285,000 (9.71%). Sub-let from Thorntons to Timpson.
209-213 Brook Street	In January 2013 a buyer purchased 40 sq.m. of retail space for £180,000 (7.11%). Let to Minit UK plc t/a Timpson.

Source: Ryden/ CoStar

Appendix 15

Dundee Bus Services

Dundee	202, 1A,1B, 1S,10S, 1C, 5, 14,14A,15, 7,16, 17, 18, 19, 20,20C,22, 21,22,23, 26, 26C, 28,29, 36,39,X39, 32,33,33A, 36,36C, 39, 137, 137A,42, X42,X54, 57,59,43, 73,75,77,78, 79,96,99, 138,139, 204,208,342,M9	55	hourly