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proposed local development plan
technical note 3 2016

PLANNING FOR TOWN CENTRES & EMPLOYMENT

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1 INTRODUCTION

- 1.1 East Lothian Council's Proposed Local Development Plan (LDP) is accompanied by a series of Technical Notes that explains how key aspects of the local development plan have been developed and give further explanation to the Council's approach to various planning strategy or policy issues. This Technical Note is prepared in relation to employment issues in East Lothian.

2 NATIONAL AND REGIONAL PLANNING POLICY, GUIDANCE AND ADVICE

National Planning Policy

- 2.1 The Scottish Government's National Planning Framework 3 (NPF3) is a material consideration in plan-making and sets the framework for the spatial development of Scotland. NPF3 required plans to support sustainable economic growth by providing a positive policy context for development that delivers economic benefits to their area.
- 2.2 NPF3 requires development plans to support the role of town centres to thrive and meet the needs of their residents, businesses and visitors for the 21st century.

Scottish Planning Policy

- 2.3 Scottish Planning Policy (SPP) notes that Local Development Plans should allocate a range and choice of sites for business and employment to meet the needs of different business sectors¹.
- 2.4 SPP requires the LDP to identify a network and hierarchy of centres identifying any new proposed centres. Plans should allow for town centre strategies to deliver improvements to town centres and should include policies to support an appropriate mix of uses in town centres, local centres and high streets. They should also include policies to support an appropriate mix of uses in town centres, local centres and high streets. The LDP should adopt a sequential town centre first approach when planning for uses which generate significant footfall, including retail and commercial leisure uses, offices, community and cultural facilities and, where appropriate, other public buildings such as libraries, and education and healthcare facilities.
- 2.5 SPP requires the LDP to allocate sites that meet the diverse needs of the different sectors and sizes of business which are important to the plan area in a way which is flexible enough to accommodate changing circumstances and allow the realisation of new opportunities.

Strategic Planning Policy

- 2.6 The expectations of NPF3 have been reflected in the spatial strategy, development and policy requirements of the Strategic Development Plan for Edinburgh and South East

¹ Scottish Planning Policy paragraph 93 - 105

Scotland (SESplan). The Local Development Plan for East Lothian must conform to the SESplan. It requires that 76 hectares of employment land be maintained in East Lothian. It also identifies four strategic employment sites in East Lothian. These are the existing allocated sites at Craighall Business Park, Musselburgh and at Blindwells, Macmerry and at Spott Road Dunbar. SDP does not preclude a review of other sites currently proposed for employment use or the identification of new sites for employment. Land for employment within East Lothian was reviewed and Table EMP 1: Employment Sites and Proposals by Cluster Area of the Proposed LDP explains where land is allocated.

- 2.7 The LDP can consider if there are any circumstances where mixed use development on strategic employment sites, including support and ancillary services to employment uses, could be accepted in principle. There is scope for non-strategic employment sites to be removed, added and / or promoted for mixed uses. Existing strategic employment proposals and / or new strategic employment proposals may be made more flexible concerning the mix of land uses that can be developed. For all employment sites alternative policy approaches may be followed, for example in respect of support and ancillary services to employment uses, including in relation to existing operational employment areas. However, 76ha of employment land must be retained in the area.

3 THE PROPOSED LDP APPROACH: EMPLOYMENT LAND

- 3.1 Economic development is a key priority for East Lothian and is at the forefront of East Lothian Community Planning Partnership's Single Outcome Agreement and East Lothian Council's Council Plan 2012-2017. The East Lothian Economic Development Strategy 2012 to 2022 is a reflection of the priority placed on economic development and acts as a guiding framework for future activities. It sets out clear strategic direction and is the foundation of the vision set out in the Council Plan of:

In 2020 East Lothian will have a dynamic and flourishing economy with our citizens proud to live, learn, work and play in East Lothian.

- 3.2 To help achieve the vision, two major strategic goals have been set to be achieved by 2022:

- To increase the number of businesses in East Lothian with growth potential (*EDSI strategy action plan*)
- To increase the proportion of East Lothian residents working in and contributing to East Lothian's economy – increase EL's jobs by an additional 7,500. (*EDSI strategy action plan*)

- 3.3 The 2 strategic goals are underpinned by 5 key objectives:

- To be the best place in Scotland to set up and grow a business.
- To be Scotland's leading coastal, leisure and food & drink destination.
- To build on our proximity to Edinburgh to encourage study, work and spend in East Lothian.
- To provide high quality employment pathways for East Lothian's workforce.

- To become Scotland's most sustainable local economy.

3.4 East Lothian continues to support key sectors in its local economy, including energy (including renewable energy), food and drink, life sciences, engineering, retail and tourism. These were identified by the East Lothian Council Economic Development Strategy 2012-22.

Development of key sites to create business clusters is planned at Craighall which can take advantage of Queen Margaret University.

3.5 In recognition for the need of economic land /commercial units throughout the county and the varying levels of demand / requirement the following tables have been prepared by East Lothian Council Economic Development and Strategic Investment (EDSI). These identify preferred requirements within East Lothian for employment locations, serviced plots, office and units. The tables have been developed from data gathered from the Business Base Survey undertaken every 2nd year since 2007 by the Economic Development and Strategic Investments Team and aggregated accordingly.

Table 1 - Preferred Employment Location	%
Haddington / Macmerry	32%
Musselburgh	20%
North Berwick	20%
Dunbar	14%
Tranent / Prestonpans	9%
A1 Corridor	5%

Table 2 – Land as serviced plots	%
Land 0 - 0.25 acre	19%
Land 0.26 to 0.50 acre	16%
Land 0.51 to 0.75 acre	7%
Land 0.76 to 1.00 acre	7%
Land 1.01 to 1.5 acres	26%
Land more than 1.5 acres -	24%

Table 3 – Office – preferred size	%
Office/unit 0 to 500 sq ft / 50 sq m	42%
Office/unit 501 to 1,000 sq ft / 100 sq m	22%
Office/unit 1,001 to 1,500 sq ft / 150 sq m	6%
Office/unit 1,501 to 2,000 sq ft / 200 sq m	11%
Office/unit more than 2,000 sq ft / 200 sq m	18%

Table 4- Units – preferred size	%
Office/unit 0 to 500 sq ft / 50 sq m	37%
Office/unit 501 to 1,000 sq ft / 100 sq m	23%
Office/unit 1,001 to 1,500 sq ft / 150 sq m	11%
Office/unit 1,501 to 2,000 sq ft / 200 sq m	13%
Office/unit more than 2,000 sq ft / 200 sq m	16%

3.6 In addition to the business survey an extrapolation of the 6 area partnerships based on the % of working age population in each area and the target to create 7,500 new jobs produced the following results:

Table 5 - % job density					Target new jobs	ind units space required m2	office space required m2
From area p/ships snapshots	Total population	% of working age population per area	actual number	% area for working population	7,500	47	12
Musselburgh	24,998	67%	16,749	28%	2,064	97,007	24,768
Dunbar	13,337	62%	8,269	14%	1,019	47,893	12,228
Haddington	9,064	63%	5,710	9%	704	33,074	8,444
North Berwick	12,515	57%	7,134	12%	879	41,317	10,549
Fa'side	18,396	64%	11,773	19%	1,451	68,191	17,410
Preston Seton Gosford	17,540	64%	11,226	18%	1,383	65,018	16,600

3.7 Over the 10 year period of the strategy the average number of new jobs which need to be created in each area partnership to achieve the target are as follows:-

Table 6 – Area Partnership Area	Average jobs annually
Musselburgh	206
Dunbar	102
Haddington	70
North Berwick	88
Fa'side	145
Preston Seton Gosford	138

3.8 Demand for employment land therefore exists across East Lothian and has informed the review of development sites for employment uses. The highest demand is for relatively small industrial workshops/units of 50 – 100 sq m.

3.9 Following a review of existing employment land supply in 2013² it was found that the majority of East Lothian's employment land was constrained with only 1 hectare immediately available. Several land owners were reported as unwilling to sell or develop land allocated for employment purposes and some sites may not be viable for development for class 4, 5 or 6 use alone given the rental levels achievable versus the costs of servicing and development. Some of East Lothian's employment buildings were becoming obsolescent. Take up rates for economic land were slow and to help improve this East Lothian Council through it East Lothian Land company continues to make small scale interventions for example through the re purposing of vacant East Lothian Council owned buildings and the development of small workshop units.

3.10 Details of the economic land supply are noted in the in the Economic Land Audit of Class 4, 5 and 6 uses dated February 2016 and contained at Appendix 1. It shows that of the total employment land supply is constrained with none immediately available.

² East Lothian Economic Land Report 2012/13, Baird Lumsden for East Lothian Council Economic Development

3.10 The Main Issues Report acknowledged this context and proposed to meet the challenge of increasing job density in East Lothian, ensuring that opportunities for job creation and economic growth are generated alongside the increase in population and the delivery of new homes, by greater flexibility in the type of employment generating uses permitted on employment sites. It asked whether this should be on all employment sites or just on local and not strategic employment sites.

3.11 Most of the responses received to the Main Issues Report favoured this approach as a practical solution. Accordingly, a policy that permits a more flexible approach to employment generating uses on employment areas has been developed and is proposed as Policy EMP1: Business and Employment Locations. The policy makes clear that other employment generating uses are only permitted provided they do not conflict with the town centre first principle and provide there are no amenity conflicts or other unacceptable impacts. This should ensure for example, that a children's nursery is not located adjacent to a use that attracts a significant volume of heavy goods vehicles.

Employment Sites and Proposals

3.12 The LDP employment sites and proposals to meet its spatial strategy and satisfy demand in marketable locations are identified in the LDP Table EMP1: Employment Sites and Proposals by Cluster Area. Existing employment areas such as operational industrial estates total 89.8 hectares of land. Land previously allocated for employment use that continues to be allocated for employment use but which has not yet been developed totals 77.3 hectares. Where sites have been the subject of development proposals this is noted. New sites for employment purposes allocated in the Proposed Plan total 102.9 hectares of land. Additional sites at Howe Mire and at Mains Farm, North Berwick have been included. Together these sites meet the requirements of the SDP.

3.13 Table EMP 1 does not include some existing employment sites in the countryside. These are operational at present but if they were to cease operations then their re-use should be assessed against development in the countryside policies and any other appropriate development plan policies. LDP policy for development in the countryside allows appropriate new employment uses and the countryside contains some groupings with a range of employment uses, for example at Fenton Barns, Gilmerton and Halflandbarns. These sites will continue to be subject to the development in the countryside policy to ensure that the nature and scale of employment use that can take place would be appropriate.

3.14 Some sites have come forward in advance of the LDP for mixed housing and employment uses and this is incorporated in the table. Sites allocated for a mix of housing and employments are included in the Proposed LDP development proposals which is referred to in the relevant column in the table. Where the proportion of employment land has been agreed the table reflects this e.g. Tantallon Road South where the employment proportion is

1.0 hectare whereas Gateside West is a mixed housing and employment proposal and the total site area is 5.3 hectares.

3.15 Most of the new land included in the table is allocated in the west of East Lothian in line with the spatial strategy but as demand indicates all larger settlements across East Lothian require some employment land to cater for their needs. Craighall provides 20 hectares of new land as a strategic employment site as part of a larger mixed use development that also includes the 21.5 hectares of land previously allocated for employment uses north west of Queen Margaret University.

3.16 The following tables give the outcome of the review of each site for employment that was included in the Main Issues Report and new sites that were suggested and have been included in the LDP:

Site proposed for employment or part employment in MIR by Cluster Area	Outcome of Review	MIR Site Ref
Musselburgh cluster		
Old Craighall Junction, land south west of (5ha)	Retain whole site for employment	PREF-M2
Land at Craighall (app 96 ha) including sites NW and SE of Queen Margaret University; and SW of QMU over the A1 as part of mixed use proposal	Remains a mixed use proposal but with a reduced amount of employment land now 21.5 ha NW of QMU and a further 20 ha SW of QMU across the A1.	PREF-M1
Prestonpans cluster		
Land around Cockenzie Power station (approx. 80 ha)	Safeguarded for energy related uses in line with NPF3. Not retained for employment use	PREF-P1
Tranent cluster		
Land east of Macmerry Industrial estate (15 ha)	Retain whole site for employment	PREF-T9
Windygoul SW (9ha)	Retain whole site for employment	PREF-T3
Haddington cluster		
Gateside East (1ha)	Mixed use housing and employment	PREF-H3
Peppercraig (7ha)	Retain site for employment, business, hotel and leisure uses	PREF-H5
Dunbar cluster		
Spott Road, Dunbar (app. 12 ha excluding land with permission for solar energy park	Solar energy park planning permission has lapsed. Whole site allocated for employment use.	PREF-D5

Newtonlees, Dunbar (3.4ha)	Planning permission subsequently granted for residential use. No provision for employment use	PREF-D6
Auction Mart, East Linton (1 ha)	Planning permission granted for shop, café, market stalls. Retained for community and employment use	PREF-D7
North Berwick cluster		
Tantallon Road (9 ha) as mixed use residential and business	Planning permission granted for mixed use residential and business. Retain for approx. 1 ha of employment use	PREF-N2
Blindwells		
New Settlement (10 ha)	Retain in whole for employment	

3.17 In addition new sites have been identified and are shown in the table below:

Site proposed for employment or part employment in LDP by Cluster Area	Use	LDP Site Ref
Musselburgh		
Howe Mire	Mixed use residential and employment	PROP MH13
Mains Farm South (1 ha)	Additional area of land to south adjacent to site with planning permission for employment as part of mixed use allocation	PROP NK1

3.18 The scale of new development proposed in East Lothian requires investment in infrastructure including transport networks. New development, including that for employment may be required to contribute towards the cost of specific items of transport infrastructure in line with the Developer Contribution Zones contained in the LDP.

3.19 The LDP also supports the principle of home working, live-work units, micro businesses and community business hubs which are examples of more flexible modern day employment and exist in several places in East Lothian including the Humble Hub, and small business centres at Cockburn Halls at Ormiston and at Cockenzie. For the avoidance of doubt home working and live-work units are where a business operates from an office or room within a house but, importantly, that business does not have any adverse amenity impacts on a residential area. It does not therefore apply to a business that may attract an unreasonable number of vehicles or create noise disturbance to a residential area. Live-work units, though supported in principle, currently lie outwith normal planning controls.

4 THE PROPOSED LDP APPROACH: TOWN CENTRES AND RETAIL

Town Centres

- 4.1 In line with SPP, the Council supports the Town Centre First Principle. The retail hierarchy of centres in East Lothian comprises Town Centres and smaller Local Centres. East Lothian's six existing Town Centres are at Musselburgh, Tranent, Prestonpans, Haddington, North Berwick and Dunbar. A new centre of a size to support its mixed use allocation including 1,600 houses is supported at Blindwells. The boundaries of each existing town centre have been reviewed and amended to include appropriate town centre uses and are shown on the Proposals Maps. The existing town centres all support a diverse mix of uses including retailing and a night time economy, are accessible and close to the town's residential areas and recognisable as vibrant areas within their communities.
- 4.2 The following small local centres have been identified in smaller towns and villages and peripheral locations within larger towns; Pinkie, Delta Drive, Olivebank and Stoneybank/Eskview Terraces at Musselburgh; Salters Road Wallyford; Hawthorn Road and the eastern end of High Street at Prestonpans; Haddington Road Tranent; Cockenzie/ Port Seton; Longniddry; Ormiston; Gifford; Dunbar Road and Tantallon Road, North Berwick; East Linton; Spott Rd at Dunbar; and Gullane. New local centres are proposed along with new development. These will be at Craighall, Musselburgh, at Wallyford, Whitecraig, Letham Mains, Haddington, Mains Farm, North Berwick and at Blindwells to serve the allocation of 1,600 homes.
- 4.4 A new policy on the protection of local facilities in smaller villages is proposed, Policy TC3: Protection of Local facilities. Smaller villages are those which are defined on the Proposals Map by not being included in the countryside area, and which do not have an identified local centre. These are Garvald, Humbie, East Saltoun, Aberlady, Dirleton, Whitekirk, Elphinstone, Gladsmuir, Macmerry, West Barns, and Pencaitland. The policy applies to shops and public houses.

Proposed LDP policies for town and local centres

- 4.5 Policy TC1: Town Centre First Principle provides the sequential approach to development proposals that would attract significant footfall, including retail, commercial leisure uses, offices (class 2), community and cultural facilities and potentially public buildings such as libraries, education and healthcare facilities. In the context of the sequential approach, town centres also includes local centres but all proposals will be considered in the context of the scale of the settlement and the role and function of its centre, for example large scale proposals are unlikely to be appropriate in smaller local centres and should be directed to town centres first. To ensure proper application of the principle, where relevant the scope for disaggregating specific parts of a retail or leisure development on to separate, sequentially preferable sites should be addressed by applicants. Where a sequentially preferable site is suggested to be unviable (either for the application proposal in its entirety or for a disaggregated element of it), an applicant will be expected to provide evidence of

this. For example, such submissions could follow a standardised viability appraisal format in line with the Royal Institute of Chartered Surveyors 'Red Book'.

- 4.6 A flexible and realistic approach is to be taken in the application of this policy. Regard will be given to the scale of a proposed development and its intended catchment area when determining how to apply the sequential approach, as well as to other planning objectives. The town centre first principle will not be used to resist new shops or appropriate facilities proposed within other areas such as suburban areas or smaller villages if they would be of an appropriate scale to provide for local needs.
- 4.7 The sequential approach will not normally be applied to proposals for Class 5, and 6 employment uses as these uses are not usually visited by members of the public and hence do not attract significant footfall. While many Class 4 proposals will be appropriate in scale and character for a town centre and will normally be expected to locate there, some Class 4 proposals may be better located on land specifically allocated by the Plan for such use. Proposals for Class 4, 5, and 6 uses within town, village and local centres will be assessed on their merits and will be supported where their impacts will be acceptable, taking account of other relevant Plan policies.
- 4.8 Both town and local centres are subject to the Proposed Plan Policy TC2: Town and Local Centres. In line with SPP this encourages a mix of uses and seeks to ensure that the vitality and viability of a centre is not harmed by changes of use. The Council monitors ground floor commercial uses in its town and local centres on an annual basis and given that vacancy rates in East Lothian are consistently below the Scottish average considers it important that these are retained in commercial use within town centres. Commercial premises in less prominent locations such as above retail premises or in backland areas may be permitted to change use depending on their local context.

Town Centre Strategies

- 4.9 The Main Issues Report asked for ideas for improving town centres. A wide range of responses was received on each town centre. The Council has an up to date town centre strategy for Musselburgh town centre and further town centre strategies will be prepared as supplementary guidance with involvement from local Area Partnerships. The town centre strategy for Haddington to 2014 resulted in significant improvements to Haddington town centre and is due for replacement. These will take into account comments made to the Main Issues Report.

Blindwells Town Centre

- 4.10 The Main Issues Report asked whether the current network and hierarchy of existing centres was supported; most respondents indicated support. Accordingly the Proposed Plan maintains the hierarchy of existing centres.

4.11 The Main Issues Report also asked that in the event that Blindwells was able to be expanded whether there was support for a new town centre to be located there. Most respondents supported a new town centre at Blindwells though Haddington was also suggested for retail investment. The Proposed Plan identifies a new local centre at Blindwells to serve the allocated area. The Council has a vision to develop a larger new settlement at Blindwells identified in PROP BW2: Safeguarded Blindwells Expansion Area. Responses to the Main Issues Report were mixed in respect of whether Blindwells should in the longer term provide a sub-regional town centre, with some seeing it as a threat to existing centres and others considering that it is too close to Edinburgh to be viable. The Proposed Plan makes it clear that a new town centre at Blindwells is required for the existing allocation only and that prospects for a longer term sub-regional centre will only be considered in the event that a comprehensive development solution exists for a larger settlement the Blindwells.

Retailing

4.12 The Council commissioned a Retail Capacity Study in 2015 from Roderick MacLean Associates that is appended to this Technical Note. This identified East Lothian catchment areas for main towns and forecast population projections based on housing land provisions within the Main Issues Report. Information on shopping patterns was collected by a 1,000 sample household survey across East Lothian. This identified convenience shopping patterns for each primary catchment area and identified where expenditure leakage existed.

4.13 Taking into account planned retail development it forecast spare convenience expenditure capacity across East Lothian. Its conclusion on forecast spare convenience capacity indicates that it is important to support improvements to the quality of shops in the town centres of East Lothian, rather than the promotion of significant additional convenience floorspace.

4.14 Expenditure on comparison goods was assessed across East Lothian and identified that a high proportion of comparison goods expenditure occurs outside East Lothian most commonly to Edinburgh City centre and Fort Kinnaird retail park. Forecast expenditure growth rates for comparison goods are higher than those for convenience expenditure. The prospect of clawing back comparison expenditure leakage is reported as low because of the continued attraction of Edinburgh and Fort Kinnaird. The report suggests that existing comparison retail floorspace in the town centres in East Lothian should continue to be supported through encouraging improvements to the quality and range of comparison shopping along with other measures to improve the attractiveness of the town centres as destinations.

5 THE PROPOSED LDP APPROACH: TOURISM

Tourism

5.1 The East Lothian Economic Development Strategy 2012-22 identifies tourism as one of the strengths of the East Lothian economy and a source of employment opportunities in the future. The Proposed Plan acknowledges the importance of Archerfield Estate for golf based leisure and tourism and continues to support the principle of high quality golf based hotel,

leisure and recreation development through Policy TOUR1: Archerfield Estate. Elsewhere the chalets at Belhaven are to continue to be used for holiday accommodation (Policy TOUR2: Belhaven Chalets) and at Dunbar harbour commercial or tourist related development above the Dunbar Castle Vaults are supported provided the vaults are opened up to public view.

- 5.2 To develop its tourist economy further East Lothian requires additional tourist and visitor accommodation³. Proposed Plan Policy TOUR 4, which was contained in the East Lothian Local Plan 2008, has been reviewed and now applies to guest houses as well as hotels as they fall within the same use class. To ensure that this policy does not potentially deter anyone from starting a new tourist accommodation business by converting an existing property the policy will not now apply to any tourist accommodation that required a change of use of an existing building within three years of its grant of permission.
- 5.3 The plan supports a new hotel use at Peppercraig, Haddington as part of a wider employment proposal.

6 THE MAIN ISSUES REPORT SUMMARY OF RESPONSES

- 6.1 The preferred approach suggested in the Main Issues Report was to promote mixed use strategic and local employment sites where appropriate, maintain the quantity of the current employment land supply, and review the contribution that existing employment proposals make to this supply considering any sites that were no longer required.
- 6.2 The reasonable alternative was to maintain strategic employment sites solely for employment use and allow local employment sites to have mixed use.
- 6.3 The summarised key messages from the Main Issues Report Consultation on Town Centres by respondent type were:
- 6.4 Of the key agencies Scottish Government indicated that the preferred approach seems consistent with Scottish Planning Policy which indicates that plans should reallocate business sites which are underused or not taken up to enable a wider range of viable business or alternative proposals. SEPA has indicated that the review of employment land supply and consideration of its options should continue to be made through strategic environmental assessment and locations selected that co-exist satisfactorily with other existing or proposed uses in the area.
- 6.5 Community Councils had a mixed view with Prestonpans, Humbie/Saltoun/Bolton and North Berwick supporting the preferred approach; Gullane and Cockenzie the reasonable alternative and East Lammermuir, Dunbar, Duns and Garvald/Morham supporting neither approach. Alternatives suggested included more emphasis on infrastructure such as broadband to encourage more employment particularly in rural areas. Community Councils generally favour local employment including for smaller settlements rather than concentrating solely on strategic employment sites. Some indicated that there was local

³ Edinburgh and the Lothians Tourism Accommodation Audit, Scottish Enterprise Edinburgh and Lothian September 2006

demand particularly for small business units but that allocated land that was unserviced could not meet this; different models of delivery might help.

- 6.6 Other local interest groups suggested that mixed use might have a place on some sites; employment sites needed better promotion and that in future there will be an increasing need for flexible affordable work space; developers should be encouraged to provide small serviced employment land as part of housing developments.
- 6.7 Members of the public, most support the preferred approach which was commonly recognised as a practical approach. There was considerable opposition to the preferred allocation of an additional large site new site between Cockenzie and Prestonpans for employment. Some were concerned that employment sites should not be allowed to change to housing and that retail use should not be permitted.

7 GLOSSARY OF TERMS

Employment use - Generally businesses, general industry or storage and distribution uses, as defined in the Town and Country Planning (Use Classes)(Scotland) Order 1997.

Town Centre - Centres that provide a diverse and sustainable mix of activities and land uses which create an identity that signals the function and wider role.

Local Centre - for the purposes of this Plan a local centre is a local shopping centre as identified by this Plan.

Vitality and Viability (of town and local centres) - Vitality is a measure of how lively and busy a town centre is. Viability is a measure of its capacity to attract ongoing investment, for maintenance, improvement and adaptation to changing needs.



East Lothian Retail Capacity Study 2015

March 2016

Roderick MacLean Associates Ltd
Planning and Development Consultancy

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Appendix 1 Distribution of projected population by planned new housing development

Appendix 2 Household telephone interview survey- sample quotas and list of questions

Appendix 3 Convenience shopping patterns from the household survey

Appendix 4 Convenience expenditure inflows and outflows by zone

Appendix 5 Internet and mail order spending on comparison goods from the household survey

Appendix 6 Comparison shopping patterns from the household survey

Appendix 7 Town Centre Health Check Indicators in the 2014 SPP

1 Introduction

1.1 The Brief

1.1.1 In July 2015, East Lothian Council commissioned **Roderick MacLean Associates Ltd** to undertake a retail capacity study for East Lothian to assist preparation of the Proposed Local Development Plan. The consultancy brief is represented by the detailed content and method within the fee proposal submitted by Roderick MacLean on 13th July from previous discussions with the Council.

1.1.2 The study includes forecasts of spare convenience and comparison retail capacity over the next five and ten years, together with interpretation of the type, level and distribution of retail floorspace that could be supported in the context of retail market trends. All values are in constant **2014 prices**.

1.1.3 Forecasts of spare convenience retail expenditure capacity for each of the six sub area zones in East Lothian are included. After consideration of the original fee proposal, the Council also confirmed that the forecast of comparison retail expenditure capacity must relate to the whole Council area, as this is most relevant to inform the emerging LDP.

1.1.4 The brief required incorporation of the effects of planned new housing expansion on the future distribution of population within East Lothian, in particular the proposed new settlement at Blindwells in the West Sector area. It is proposed to address the likely effects of this expansion in terms of future shopping patterns and requirements.

1.1.5 On Blindwells, the potential to accommodate a new, stand-alone shopping centre with Class 1 uses requires to be assessed, with a primary catchment that could potentially cover Prestonpans and Tranent, including Port Seton, Cockenzie, Longniddry and Macmerry. Commentary is to be provided on the potential demand for a shopping centre at Blindwells within the wider Edinburgh area/ East Lothian retail market, including the type of retailing which may have potential to succeed in this location.

1.1.6 On other specific opportunities, the Council wishes assessment of the potential of

the Bleachingfield site in Dunbar to accommodate retailing in the future.

1.1.7 A household telephone interview survey (1,000 sample) was undertaken by *NEMS Market Research* to determine the shopping patterns. The household survey gathered information on shopping patterns in East Lothian, plus information on public use and perceptions of the town centres. The latter data does not form part of this Retail Capacity Study and will be available for analysis by the Council to inform town centre health checks in support of the Proposed LDP.

2 Planning policy framework

2.1 Introduction

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

2.2 Scottish Planning Policy

2.2.1 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.

2.2.2 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. A list of health check indicators is contained in Appendix A of the 2014 SPP, which is reproduced in Appendix 7 of this study, for reference. Some indicators are more subjective than others, but are important, such as 'sense of place', for example. Some indicators can be difficult to determine in practice, such as employment in town centres.

2.2.3 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.

2.2.4 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.

2.2.5 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.

2.2.6 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.

2.2.7 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.

2.3 Current SESplan

2.3.1 The Plan was adopted in June 2013. Under the Spatial Strategy, modest growth is planned in existing settlements in East Lothian, plus support for a new settlement at Blindwells. The SESplan refers to the vision of achieving a new settlement of 4,600 homes, but with the expectation that no more than 1,600 new homes are likely to be completed before 2032. The SESplan considers that it is likely that completions at Blindwells will only contribute to the Spatial Strategy for the period 2019-24 at the earliest. (This will be updated- see LDP MIR).

2.3.2 The SESplan re-iterates the town centres and retail policy outlook in the SPP, with a duty for Local Development Plans (LDPs) to identify town centres and commercial centres. These must form a network of centres for promotion and protection, including application

of the sequential test for new retail and commercial development proposals. Table 1 in the SESplan identifies the network of centres. All those below Strategic Centres remain to be defined in the emerging LDPs (these include all town centres in East Lothian).

2.4 SESplan 2

2.4.1 Work has commenced on the replacement SESplan with publication of the MIR in the July 2015. Publication of the Proposed Plan for consultation is scheduled for the summer in 2016, with submission of the Proposed Plan to the Scottish Ministers in the spring of 2017.

2.4.2 On spatial priorities for the SESplan 2, the MIR comments that many parts of East Lothian have poor accessibility and are rural in character, with limited capability to support new development of a strategic nature. The MIR also notes the good accessibility along the main travel corridor in East Lothian (A1), which is supportive of Blindwells, for example. These factors are relevant considerations for new retail development. The MIR also refers to the preferred approach towards town centres, which is to support the existing network, while allowing flexibility for LDPs to designate new town centres where appropriate.

2.5 East Lothian Local Plan

2.5.1 Adopted in 2008, the Local Plan is in course of replacement by the emerging Local Development Plan. Musselburgh, Haddington, North Berwick and Dunbar are classified as 'town centres' in the Local Plan. It contains a section on retail planning policies.

2.5.2 *Policy R1: New Shops-* directs new retail development proposals to town centres as the priority location, followed by justification required for other locations as set out in the sequential test. New shops in suburban areas or village areas would be supported in principle if they provide for local needs. Provision of a new retail park would only be supported where there are recognised deficiencies which cannot be met in town centres. Retail impact assessments are required in support of proposals greater than 1,000 sq m gross.

2.5.3 *Policy R2F: Protection of local shops-* in villages and remoter rural areas, there is a presumption against change of use of a

shop to another use, unless there is reasonable justification.

2.5.4 There is a section on retail development proposals which is largely out of date. The ASDA supermarket has since been developed in Dunbar (Proposal R2), as has the Tesco store in North Berwick (Proposal R3). Provision remains for a small supermarket in Wallyford to serve the needs of that settlement only (Proposal R4). The review of supermarket sites in Haddington (Proposal R5) has been superseded by the subsequent consent for a Sainsbury's supermarket at Gateside.

2.6 East Lothian LDP- MIR 2014

2.6.1 The MIR refers to the 'town centre' status of the four main towns, which makes up the network of centres in East Lothian. It also refers to support for new local centres at Wallyford and Blindwells. On the latter, the MIR invites consideration of the opportunity to create a new town centre at Blindwells, which may offer the possibility of reducing journeys to Edinburgh for a range of shopping.

2.6.2 The town centre opportunity would only be associated with expansion of a new settlement at Blindwells, not simply an out of centre commercial development on its own. The MIR introduces the possibility that the town centre could serve the West Sector area of East Lothian as its primary catchment, while also potentially serving much of the rest of the Council area as its secondary catchment, in view of its accessibility close to the A1. The MIR invited consideration of whether the concept should aim serve the new settlement only, or a wider area.

2.6.3 Appraisal of the possible scale and type of retailing that could be realised at Blindwells is addressed at the end of this report, following review of retail market demand and the expenditure capacity assessments for convenience and comparison retailing.

3 Retail trends

3.1 Introduction

3.1.1 This section sets out the current trends in retailing, including expenditure growth by sector, retail market demand, the effects of online shopping and the importance of the retail/leisure offer. The purpose is to highlight trends which are relevant to future retail provision in East Lothian.

3.2 The economy

3.2.1 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*).

3.3 Retail spending

3.3.1 The National Statistics for Scotland (February 2016 Bulletin) reveal that the volume of retail sales in Scotland increased by 2.2% over the year ending in the fourth quarter of 2015, but the value of the sales contracted by 0.9% over the same period. The equivalent GB retail sales growth in volume was 3.7% and 0.1% in value for the same periods.

3.3.2 Looking to the future, the latest *Oxford Economics* forecasts published by Pitney Bowes forecast an average growth rate of 0.6% per annum in volume for convenience retail expenditure from 2014-26 and 3.7% growth per annum for comparison expenditure in the UK. These forecasts reveal expectations of continuing growth in retail sales, although the growth in convenience expenditure is much lower than for comparison expenditure.

3.4 Retailing in town centres

3.4.1 Retailing continues as a key activity in town centres in general, alongside other activities, including non-retail services and community uses. Retail studies across Scotland confirm that the importance of retailing in the network of centres remains, but most small and medium sized town centres are under pressure from the trends identified in the following paragraphs of this section. Maintaining continuous improvements to the

range and quality of retailing in town centres will be essential to ensure their future, as part of a package of measures to strengthen the attraction to individual town centres. Most of the retailers in East Lothian are small independent operators and the challenge is to maintain their existing representation.

3.5 Internet shopping and the High Street

3.5.1 Online retailing 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. Online retailing, together with mail order and vending machines, is classified as Special Forms of Retailing (SFT), where non-store related sales are deducted from expenditure available to service conventional shop floorspace. Online shopping is by far the main component and driver of trends in SFT.

3.5.2 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.

3.5.3 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.

3.6 Concentration of demand in the largest centres

3.6.1 A key trend in the retail sector is the concentration of multiple comparison retailer market interest 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.

3.6.2 This widening range of goods and services is provided in larger destinations, such as Edinburgh and Glasgow, and at purpose-built regional shopping malls, which in Scotland are in the Central Belt (Braehead for example). These locations provide the main focus for retail market demand and investment. Many retailers require fewer, larger branches than they operated in the past, as customers will travel further to patronize a wider range of goods and services.

3.6.3 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.

3.6.4 Finally, retail market demand, especially in the non-food sector, tends to lag well behind forecasts of retail expenditure growth. This is because the development market is cyclical, but the expansion of online shopping appears to be having a major effect on the demand for new retail floorspace and the associated formats, in the view of this author.

3.7 Leisure and shopping

3.7.1 The leisure sector is a key diversifier for many retailer locations. Ryden point out that leisure uses bring additional expenditure, broaden the customer experience; and in some locations are a useful way to fill vacant retail premises. In small towns, like those in East Lothian, restaurants / bars and cafes can comfortably share the high street with shops and generally add to the attraction of the town centres.

3.8 Value retailing

3.8.1 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. This format has

competed very successfully with the main supermarket operators.

3.9 Supermarkets- trends

3.9.1 Trends in food shopping have changed. The growing market share captured by expanding superstores halted in 2013/14. Tesco and other operators have withdrawn from many planned sites and Wm Morrison is to close 11 stores (none of these in Scotland). In general, recently published market commentary reveals that the main operators, (aside from the food discounters) are experiencing difficult trading conditions in the grocery market.

3.9.2 The development focus has shifted away from superstores and large supermarkets. It has turned to growth in small/medium units of up to 1,300 sq m net and small local convenience stores of around 300 sq m net. This is reflected by expansion of the food discounters (*Aldi* and *Lidl*) and also *M&S Simply Food* stores and by development of 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. More recently, the current market conditions experienced by the main operators has added caution to the rate of expansion of small stores.

3.10 Interpretation for East Lothian

3.10.1 Retail market conditions will largely determine the opportunities for new shopping developments in East Lothian in the foreseeable future. Where spare expenditure capacity exists, it will be shaped by market conditions, rather than driving the market.

3.10.2 On convenience retailing, the towns in East Lothian are already quite well populated with main supermarkets and food discounters (Tables 5.11 and 5.12). So the principal market opportunities are likely to be associated with local store developments of the type described in paragraph 3.9.2, and extensions, together with improvements in the quality and range of the shops. Development of a new centre at Blindwells would be the largest

single opportunity, which is referred to in section 8.

3.10.3 On comparison retailing, the opportunities for development of new floorspace, including at Blindwells, will be largely influenced by the market trends described in this section:

- Nature of existing retailers in the East Lothian towns- mainly independent operators;
- Measures to increase the attractiveness of the town centres as destinations;
- Continued growth in online retailing; and
- Multiple comparison retailer demand concentrated in the largest city centres and shopping malls.

3.10.4 The scope for Council intervention in the market is principally through planning policies, especially the 'town centres first' outlook, directing new retail and leisure developments to town centres as the preferred location under the sequential test. Town centre health checks, including periodic monitoring the level and quality of retail units, including vacancy levels, are essential. Other important forms of intervention include investment in the streetscapes and fabric of town centres, including improved accessibility. This activity is needed to promote town centres as destinations where the public will visit and spend.

3.10.5 leisure sector is a key diversifier for many retailer locations. Ryden point out that leisure uses bring additional expenditure, broaden the customer experience; and in some locations are a useful

4 East Lothian catchment zones and population

4.1 Introduction

4.1.1 This section sets out the catchment area zones in East Lothian for the Capacity Study, and provides projected population data to 2025 which reflects the planned distribution of new housing development.

4.2 Zones (primary catchment areas)

4.2.1 For the purposes of the study, East Lothian has been divided into six zones, which represent the primary catchment areas of the main towns shown in Table 4.1. The zones are illustrated in Figure 4.1 and were agreed with the Council beforehand. The findings of the household survey confirm that they represent

the primary catchment areas for convenience shopping for the main towns. More detailed explanation is provided in section 5.

4.3 Population

4.3.1 Table 4.1 shows the current and projected populations of the six primary catchment areas up to 2025. Distribution of the projected growth among the six catchment areas is based on planned new housing completions, including Blindwells, controlled to the total projected population of East Lothian from the Register General's 2012 based projections. Details are shown in Appendix 1 and in the footnote to the table.

4.3.2 Population growth of nearly 9% over the next ten years is forecast, amounting to some 9,400 in East Lothian. The highest proportion is in Musselburgh.

Table 4.1
East Lothian Council area: population projections with apportionment to the zones in 2020 and 2025 based on the housing land provisions in the MIR 2014

Zone	Primary catchment area	Census 2011	(2) 2015	(2) 2020	(3) 2025
1	Musselburgh	24,998	26,303	27,953	29,969
2	Prestonpans/ Port Seton	17,540	17,636	17,757	17,778
3	Tranent	18,396	18,905	19,547	20,570
4	Haddington	12,931	13,447	14,100	14,805
5	North Berwick	12,515	13,071	13,775	14,265
6	Dunbar	13,337	13,916	14,647	15,297
(1) Total East Lothian Council area		99,717	103,278	107,779	112,686

Note

Local retail catchment populations are from the 2011 Census based on Ward areas, as shown in Figure 4.1

(1) The totals for 2015, 2020 and 2025 are from the RG 2012 based population projections for E Lothian

(2) Apportionment to the zones in 2015 and 2020 is based on the existing and preferred allocated new housing land supply for 2009-19 in the MIR 2004- see Appendix 1

(3) As above for 2025, based on the MIR housing land supply for 2019-24

Figure 4.1 East Lothian Study Zones (primary catchment areas of the main towns)



5 Convenience expenditure and turnover

5.1 Introduction

5.1.1 This section sets out the convenience expenditure and turnover relationships for each of the six primary catchment areas within East Lothian, together with the existing planning consents for new stores.

5.2 Convenience expenditure potential

5.2.1 Table 5.1 shows the forecast expenditure per capita data for East Lothian, based on data commissioned from Pitney Bowes for this study.

5.2.2 Special forms of trading (SFT), including internet shopping, are removed from the expenditure per capita data, so that it relates to conventional shop floorspace, as shown in Table 5.1. The proportion of SFT, or non-store sales, is projected to increase up to 2025. It should be noted that the proportions of SFT shown in this table do not include internet

home delivery coming from existing supermarket shelves, which is a much higher proportion, though dependent on store floorspace.

5.2.3 The total convenience expenditure potential of the residents of East Lothian and each of the six primary catchment areas is shown in Table 5.2.

5.3 Convenience shopping patterns

5.3.1 Information on the shopping patterns was collected by the 1,000 sample household survey referred-to in section 1, which covered East Lothian. Sample quotas were set for each of the six study zones (primary catchment areas). Interviews were conducted by a randomly generated selection of telephone numbers, based on a structured questionnaire. The quotas and list of questions are provided in Appendix 2. The output tables produced by NEMS Market Research are available as a separate document.

Table 5.1
East Lothian residents' convenience expenditure per capita per annum (in 2014 prices)

2014 £	2015 £	2019 £	2020 £	2024 £	2025 £
2,236	2,214	2,128	2,126	2,117	2,112
<i>*Excluding special forms of trading (SFT)</i>					
2,173	2,150	2,062	2,058	2,047	2,042

Sources;

Figures in bold are from the Pitney Bowes' projected expenditure data commissioned for the study area. Figures for the other years are interpolations/ extrapolations.

The figure for 2014 from Pitney Bowes is in 2014 prices. For the other years, Pitney Bowes provided forecasts in 2013 prices.

These have been adjusted to 2014 prices by a factor of 1.00648 from the *Retail Expenditure Guide 2015/16* by Pitney Bowes.

Deductions require to be made to allow for special forms of trading (SFT- internet expenditure ,mail order etc), which do not relate to conventional floorspace. On page 39 (Table 3.5) of the *Retail Expenditure Guide 2015/16* by Pitney Bowes, the following estimates of convenience SFT are made in relation to non store sales.

2014	2015	2019	2020	2024	2025
2.8%	2.9%	3.1%	3.2%	3.3%	3.3%

This excludes items picked from shelves as internet sales.

Table 5.2			
East Lothian residents' convenience expenditure potential (in 2014 prices)			
(excluding special forms of trading)			
Zone	Primary catchment area	2015 £ million	2020 £ million
1	Musselburgh	56.6	57.5
2	Prestonpans/ Port Seton	37.9	36.5
3	Tranent	40.6	40.2
4	Haddington	28.9	29.0
5	North Berwick	28.1	28.3
6	Dunbar	29.9	30.1
East Lothian Council area		222.1	221.8
Note			
From Table 4.1 and Table 5.1.			

5.3.2 For convenience shopping, the respondents were asked *where they last visited for their main food shopping, and the time before that*. They were also asked *where they last visited for their top-up shopping*. The findings were combined to provide estimates of all convenience shopping patterns relating to each of the primary catchments, as shown in Table 5.3. The supporting information is provided in Appendix 3.

5.3.3 The patterns in Table 5.3 show that residents of Musselburgh do the great majority of their convenience shopping there, with most of the balance going to stores outside East

Lothian. In Zone 2, more than half the convenience shopping is done at stores in other areas, notably in Musselburgh and outside East Lothian. A substantial level is retained though, mostly by stores in Prestonpans. In Zone 3, only a limited proportion of convenience shopping by local residents is retained in the area (Tranent). Most is done in stores outside East Lothian, and also in Musselburgh and Haddington.

5.3.4 The potential to recapture the high levels of convenience shopping leaking from Zones 2 and 3, is investigated further in the next section.

Table 5.3							
East Lothian residents- all convenience shopping patterns							
	Origin						Total
	Zone 1 Musselburgh	Zone 2 Prestonpans	Zone 3 Tranent	Zone 4 Haddington	Zone 5 N Berwick	Zone 6 Dunbar	
Destination							
Zone 1	80%	20%	17%	0%	0%	3%	27%
Zone 2	0%	45%	9%	0%	2%	0%	10%
Zone 3	0%	0%	19%	0%	0%	0%	4%
Zone 4	0%	6%	13%	85%	16%	26%	20%
Zone 5	0%	3%	0%	2%	74%	3%	11%
Zone 6	1%	0%	3%	2%	1%	66%	10%
Outside study area	19%	26%	38%	12%	6%	2%	19%
Total	100%	100%	100%	100%	100%	100%	100%
Note							
Derived from the NEMS household survey, with main food and top-up shopping combined. See Appendix 3							
The weighting assumes 80%:20% main food: top shopping							

5.3.5 A very high proportion of convenience shopping in Zone 4 is retained in the area, mostly in Haddington, with most of the balance going to stores outside East Lothian.

5.3.6 In Zone 5, a high proportion of convenience shopping is done in the area, mostly at North Berwick, with much of the balance going to Haddington. In Zone 6, two thirds of convenience shopping is done in the area, mostly in Dunbar. Most of the balance is done in Haddington.

5.3.7 The graphs in Figure 5.1 show the most visited stores for main food shopping by the survey respondents from each zone.

5.4 Expenditure and turnover in the primary catchment areas

5.4.1 Tables 5.4 to 5.10 show the simple relationship between total expenditure and total turnover in each of the East Lothian primary catchment areas, and for the Council area as a whole: *total expenditure plus inflows, minus outflows = turnover*. Detail on how the inflows and outflows are calculated is shown in Appendix 4. There is very little convenience shopping done in East Lothian by residents from beyond the Council area.

Table 5.4 Musselburgh (Zone1): convenience expenditure and turnover (in 2014 prices)				
	%	2015 £million	2020 £million	2025 £million
Main catchment residents' expenditure potential		56.6	57.5	61.2
Add: inflows from rest of East Lothian	28%	15.7	15.9	16.9
inflows from outside East Lothian	4%	2.5	2.5	2.7
Less: outflows	-20%	-11.4	-11.6	-12.3
Retained expenditure (turnover)		63.3	64.4	68.5
Note Inflow s and outflow s from Appendix 4				

Table 5.5 Prestonpans/ Port Seton (Zone 2): convenience expenditure and turnover (in 2014 prices)				
	%	2015 £million	2020 £million	2025 £million
Main catchment residents' expenditure potential		37.9	36.5	36.3
Add: inflows from rest of East Lothian	12%	4.5	4.3	4.3
inflows from outside East Lothian	0%	0.0	0.0	0.0
Less: outflows	-55%	-20.9	-20.1	-20.0
Retained expenditure (turnover)		21.5	20.7	20.6
Note Inflow s and outflow s from Appendix 4				

Figure 5.1 Most visited destinations for main food shopping

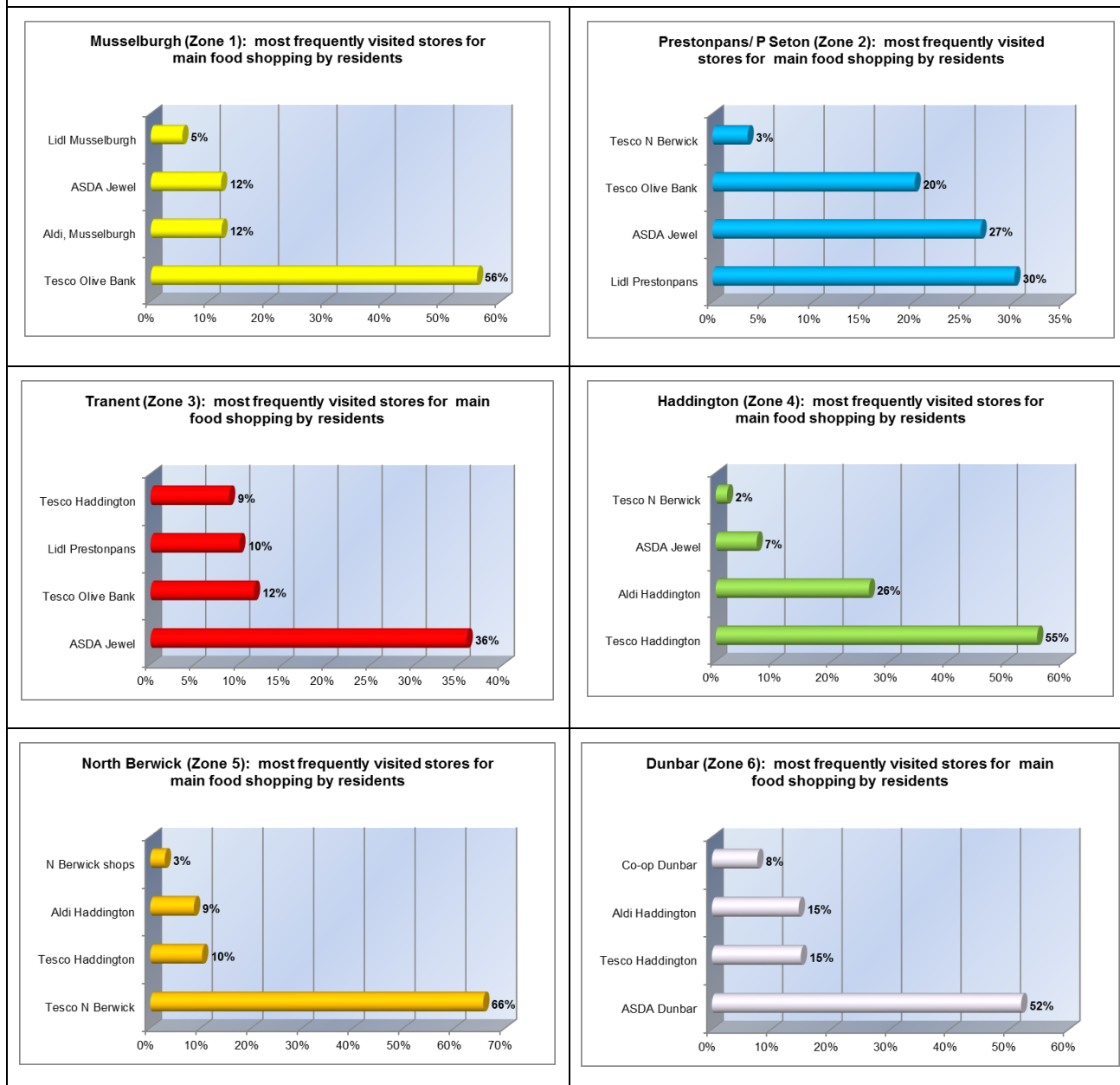


Table 5.6
Tranent (Zone 3): convenience expenditure and turnover (in 2014 prices)

	%	2015 £million	2020 £million	2025 £million
Main catchment residents' expenditure potential		40.6	40.2	42.0
Add: inflows from rest of East Lothian	1%	0.3	0.3	0.3
inflows from outside East Lothian	0%	0.0	0.0	0.0
Less: outflows	-81%	-32.9	-32.5	-34.0
Retained expenditure (turnover)		8.1	8.0	8.4

Note

Inflow s and outflow s from Appendix 4. The household survey precedes the recent opening of ASDA in Tranent

Table 5.7 Haddington (Zone 4): convenience expenditure and turnover (in 2014 prices)				
	%	2015 £million	2020 £million	2025 £million
Main catchment residents' expenditure potential		28.9	29.0	30.2
Add: inflows from rest of East Lothian	68%	19.6	19.7	20.5
inflows from outside East Lothian	1%	0.3	0.3	0.4
Less: outflows	-15%	-4.4	-4.5	-4.6
Retained expenditure (turnover)		44.4	44.6	46.5
Note				
Inflows and outflows from Appendix 4				

Table 5.8 North Berwick (Zone 5): convenience expenditure and turnover (in 2014 prices)				
	%	2015 £million	2020 £million	2025 £million
Main catchment residents' expenditure potential		28.1	28.3	29.1
Add: inflows from rest of East Lothian	11%	3.0	3.0	3.1
inflows from outside East Lothian	1%	0.3	0.3	0.4
Less: outflows	-26%	-7.4	-7.5	-7.7
Retained expenditure (turnover)		24.0	24.2	24.9
Note				
Inflows and outflows from Appendix 4				

Table 5.9 Dunbar (Zone 6): convenience expenditure and turnover (in 2014 prices)				
	%	2015 £million	2020 £million	2025 £million
Main catchment residents' expenditure potential		29.9	30.1	31.2
Add: inflows from rest of East Lothian	9%	2.6	2.6	2.7
inflows from outside East Lothian	1%	0.3	0.3	0.4
Less: outflows	-34%	-10.1	-10.2	-10.6
Retained expenditure (turnover)		22.7	22.9	23.7
Note				
Inflows and outflows from Appendix 4				

Table 5.10 East Lothian: convenience expenditure and turnover (in 2014 prices)				
	%	2015 £million	2020 £million	2025 £million
East Lothian residents' expenditure potential		222.1	221.8	230.1
Add: inflows from rest of East Lothian				
inflows from outside East Lothian	2%	3.5	3.5	3.6
Less: outflows	-19%	-41.5	-41.4	-43.0
Retained expenditure (turnover)		184.1	184.8	192.5
Note				
Inflows and outflows from Appendix 4				

5.4.2 Table 5.11 shows the convenience floorspace of shops in East Lothian at average levels, controlled to the survey based total turnover. A modest level of over-trading against national averages is indicated overall. Variations within the zones are fairly wide, with significant over-trading in Haddington and to a lesser extent in North Berwick. This position will change following development of the supermarket consents in these areas.

5.4.3 Evidence of under-trading in Prestonpans and Tranent, and to a lesser extent, Dunbar is revealed by the household survey findings. Areas with under-trading will be more vulnerable to additional trade diversion to new retail developments.

5.4.4 Household surveys are usually not very reliable at predicting turnover levels of individual stores, so this approach is not adopted in the report.

5.5 Online food shopping

5.5.1 Among those who bought their groceries on the internet, the household survey indicates that 62% used Tesco, 22% used ASDA and 14% used Sainsbury's.

5.6 Planning consents

5.6.1 The estimated turnover relating to planning consents requires to be deducted from the forecasts of spare capacity.

5.6.2 Permission has been granted for a new ASDA supermarket in Tranent and an Aldi store in North Berwick. The ASDA is now open and trading, but its opening came after the household survey for this study. The Aldi is anticipated to open soon.

5.6.3 Sainsbury's has planning consent for a supermarket at Gateside, Haddington. Some site works have been undertaken, but it is uncertain when/ whether the supermarket will be built as new mainstream supermarket development has largely halted in Scotland at present. For the purposes of this report, it is assumed that the supermarket may be developed in the period after 2020, in the absence of further information.

5.6.4 Details of the consents are shown on Table 5.12. The estimated pattern of trade diversion associated with the consents is shown

on Table 5.13, for incorporation into the retail capacity forecasts.

5.6.5 It should be noted that consent was granted for an 1,858 sq m gross supermarket at the former Allied Textiles Factory at Mid Road Industrial Estate in Prestonpans in May 2013. No operator was found and another application (15/00138) was granted permission in May 2015 for a period of three years for four small units, of which the largest is 418 sq m gross, with the Co-op as the prospective operator. The remaining units are only 93 sq m each and destined for non-retail service uses. No development has taken place. Under the circumstances, this site has not been included in the Capacity Study. If development of the 418 sq m unit occurs, it will make no material difference to the conclusions.

Table 5.11				
East Lothian: convenience floorspace and turnover, 2015 (in 2014 prices)				
	Floorspace sqm		Turnover ratio £/sq m	Turnover at average level £million
	gross	net		
Musselburgh primary catchment (Zone 1)				
Musselburgh Town Centre	1,890	1,134	3,800	4.3
Tesco Extra, Mall Ave- (total 8,645 sq m gross- 70% conv)	6,052	3,631	9,832	35.7
Lidl, Olivebank (total 1,606 sq m gross- 85% conv)	1,365	1,024	5,051	5.2
Aldi, Olivebank (total 1,184 sq m gross- 85% conv)	1,006	755	9,458	7.1
Iceland, Olivebank	663	464	7,847	3.6
Minimarket, Wallyford	396	238	6,500	1.5
Total at average levels	11,372	7,245		57.5
<i>Over-trading</i>			10%	5.8
Total from survey (actual levels)				63.3
Prestonpans/ Port Seton primary catchment (Zone 2)				
Scotmid, Prestonpans Town Centre	850	510	8,774	4.5
Co-op, Prestonlinks Shopping Centre, Prestonpans	1,131	679	8,774	6.0
Other Prestonpans Town Centre shops	2,556	1,533	3,500	5.4
Lidl, Prestonpans (total 1,668 sq m gross- 85% conv)	1,418	1,063	5,051	5.4
Co-op, Port Seton & Cockenzie	870	522	8,774	4.6
Other Port Seton & Cockenzie shops	675	405	3,500	1.4
Longniddry	346	208	3,500	0.7
Total at average levels	7,846	4,920		27.9
<i>Under-trading</i>			-23%	-6.4
Total from survey (actual levels)				21.5
Tranent primary catchment (Zone 3)				
Tranent Town Centre shops	764	459	3,500	1.6
Elphinstone/Pencaitland/Ormiston/Macmerry	807	484	3,000	1.5
ASDA, Tranent (newly opened just after HH survey- see**)				
Aldi, Tranent (total 1,350 sq m gross- 80% conv)	1,080	810	9,458	7.7
Total at average levels	1,887	1,294		10.7
<i>Under-trading</i>			-25%	-2.6
Total from survey (actual levels)				8.1
Haddington primary catchment (Zone 4)				
Tesco, Newton Port (total 3,687 sq m gross-90% conv)	3,318	1,822	9,832	17.9
Other Haddington Town Centre shops	1,297	778	3,800	3.0
Aldi, Whittingehame Dr (total 1,354 sq m gross- 80% conv)	1,083	812	9,458	7.7
East Saltoun/ Gladsmuir	141	85	3,000	0.3
Total at average levels	5,839	3,497		28.8
<i>Over-trading</i>			54%	15.6
Total from survey (actual levels)				44.4
North Berwick primary catchment (Zone 5)				
Co-op, High Street	470	282	8,774	2.5
Other North Berwick Town Centre shops	602	361	3,800	1.4
Tesco, Tantallon Rd (total 2,763 sq m gross- 90% conv)	2,487	1,492	9,832	14.7
Aberlady/ Gullane/ Dirleton	619	371	3,500	1.3
Total at average levels	4,178	2,507		19.8
<i>Over-trading</i>			21%	4.2
Total from survey (actual levels)				24.0
Dunbar primary catchment (Zone 6)				
2 Co-ops, High Street	837	502	8,774	4.4
Other Dunbar Town Centre shops	649	389	3,800	1.5
ASDA, Spott Road 4,039 sq m gross incl home shopping collection				
Total retail 3,252 sq m gross-65% conv	2,114	1,208	11,667	14.1
Co-op, Countess Cres.	1,675	1,005	6,000	6.0
East Linton	377	226	3,000	0.7
Total at average levels	5,652	3,331		26.7
<i>Under-trading</i>			-15%	-4.0
Total from survey (actual levels)				22.7
Total East Lothian at average levels	36,774	22,794		171.4
<i>Over-trading</i>			7%	12.7
Total East Lothian at actual levels (from survey)				184.1
Note				
Gross floorspace provided by the Council from 2015 surveys. Average turnover of the main supermarkets based on the Retail Rankings 2015, with VAT added and petrol sales from the supermarkets deducted.				

Table 5.12				
Convenience floorspace in East Lothian: consents and recent openings 2015 (in 2014 prices)				
	Floorspace sq m		Turnover ratio £/sq m	Turnover £million
	gross	net		
Consents				
ASDA, Haddington Rd, Tranent (total 1,846 sq m gross- 95% conv) (recently opened - after the household survey)	1,754	1,052	11,667	12.3
Aldi, Dunbar Rd, North Berwick (total 1,175 sq m gross- 85% conv) (not opened yet- former Co-op unit)	999	749	9,458	7.1
Sainsbury's, Gateside, Haddington-11/00729/PPM Site works part implemented. Total 3,700 sq m gross, 2,355 sq m net Condition- max 471 sq m net (20%) for sale of comparison goods	2,960	1,884	9,895	18.6
* Sainsbury's turnover in 2020				18.7
Note				
Gross floorspace from the Council. Estimated turnover based on company averages from the 2015 Retail Rankings				
* If developed, the Sainsbury consent might feasibly be operational close to 2020, so the estimated turnover in 2015 has been adjusted upwards by the forecast % growth in turnover in East Lothian from 2015-20 (Table 5.10)				

Table 5.13			
Estimated pattern of trade diversion to the convenience planning consents (in 2014 prices)			
	ASDA Tranent	Aldi North Berwick	Sainsbury's Haddington
<i>Trade diversion from:</i>			
Zone 1 Musselburgh stores (mainly Tesco Extra)	30%	0%	0%
Zone 2 Prestonpans/ Port Seton stores	5%	0%	0%
Zone 3 Tranent stores	5%	0%	5%
Zone 4 Haddington stores	5%	25%	55%
Zone 5 North Berwick stores	0%	50%	10%
Zone 6 Dunbar stores	0%	15%	15%
Stores outside East Lothian (mainly ASDA Jewel)	55%	10%	15%
Total	100%	100%	100%
Convenience turnover of consents	£million 12.3	£million 7.1	£million 18.7
Note			
Total turnover from previous table. The patterns of trade diversion are broad brush estimates. Where 0% is shown, this means very small/ negligible rather than none at all.			
Account is also taken of the survey based shopping patterns in this report			

6 Convenience expenditure capacity

6.1 Introduction

6.1.1 This section contains the forecasts of spare convenience expenditure capacity for the six primary catchment areas (zones) within East Lothian.

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

6.1.3 A range of spare capacity can be prepared from these components, showing a low and high estimate, after deducting planning commitments. The **low estimate** includes any over-trading and the forecast growth in expenditure in the catchment over the target periods, less planning consents. The **high estimate** also includes the potential to claw back leakage and attract new trade into the catchment.

6.1.4 Note that the high range for each zone includes limits imposed by consideration by this report of possible adverse levels of additional trade deflection from other zones from a planning perspective. Regard has been paid to the existing patterns of convenience shopping in Table 5.3 in estimating the potential to claw back leakage under the high estimate for each zone.

6.1.5 Provision of a range of spare capacity normally reduces the need for sensitivity tests.

6.1.6 'Acceptable' levels of retail impact refer to the situation where new developments would not threaten the vitality and viability of established centres. By convention, this aspect is not usually embraced into capacity studies, because it is normally addressed by retail impact assessments in support of specific retail planning applications. The planning authority would then assess whether the retail impacts

are 'acceptable' in terms of their effects on the vitality and viability of town centres.

6.2 Spare capacity forecasts 2015-25

6.2.1 The forecasts of spare convenience expenditure capacity in this report also include associated equivalent net floorspace estimates for broad guidance. Note that both the expenditure figures and net floorspace figures are rounded, so the subtotals do not always appear to sum precisely in the tables. More weight should be given to the expenditure figures, because retailer performance and formats varies widely.

6.3 East Lothian Council area spare capacity

6.3.1 Table 6.1 shows the forecast range of spare capacity for the Council area as a whole, after deducting the planning consents.

6.3.2 Under the low forecast, there is negligible spare capacity to 2020, becoming no capacity after then, if the proposed Sainsbury's supermarket in Haddington is developed.

6.3.3 In the high forecast, it is estimated that up to about 50% of the reduced convenience expenditure outflows from the Council area (after development of the consents) could potentially be recaptured. It is unlikely to be a higher proportion, because of the proximity of major supermarkets in Edinburgh, notably ASDA at the Jewel and others. Again, the proximity of Edinburgh and the existing low level of inflows suggest that the potential to attract more convenience trade into East Lothian is minimal. So the overall forecast spare capacity to 2025 is fairly small, as indicated in the table.

6.3.4 Table 6.1 is important, because it sets the overall context for assessment of spare capacity among the six zones within the Council area.

Table 6.1			
East Lothian: spare convenience expenditure capacity			
	2015-20 £million	2020-25 £million	2015-25 £million
(a) Current over- trading (Table 5.11)	12.7		12.7
(b) Growth in retained expenditure (turnover)- Table 5.10	0.7	7.7	8.4
(c) Less: convenience planning consents (Table 5.13)			
ASDA Tranent trade diversion: estimate 45% of £12.3 million turnover	-5.5		-5.5
Aldi N Berwick: estimate 90% of £7.1 million turnover	-6.4		-6.4
Sainsbury's Haddington: estimate 85% of £18.7m turnover		-15.9	-15.9
Low estimate (a+b-c)	1.5	-8.2	-6.7
(d) Add: potential to reduce outflow			
Outflow £million- Table 5.10			
Outflow post consents- Table 5.13			
Potential to claw back up to 50% of leakage after consents assumed	17.0	-0.6	16.3
(e) Add: potential to increase inflow			
Inflow £million- Table 5.10			
Potential to increase inflow s -none assumed	0	0	0
High estimate	18.5	-8.8	9.6
Equivalent supermarket convenience floorspace			
* Turnover/ floorspace ratio	£ per sq m	£ per sq m	
Low	10,680	11,125	
High	1,700	-800	sq m net
			-600
			900
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 of Sainsbury's, Tesco, Morrisons and ASDA, at £10,637 per sq m. The ratio has been increased to relate to 2020 and 2025, based on % turnover growth in E Lothian from Table 5.10			

6.4 Musselburgh (Zone1) spare capacity

6.4.1 As shown in Table 6.2, there is very limited forecast spare convenience expenditure capacity. There is not much difference between the high and the low forecast. Under the high estimate, it is unlikely that much leakage from Musselburgh could be recaptured, because of its proximity to large supermarkets in Edinburgh. Also the small amount of spare capacity under the low forecast, would not support a new store of sufficient scale to recapture significant leakage.

6.4.2 The forecast spare capacity would support additional small store developments, as defined in paragraph 3.9.2, or store extensions.

6.5 Prestonpans/ Port Seton (Zone 2) spare capacity

6.5.1 Table 6.3 shows that there is no forecast spare convenience expenditure capacity. Although there is some £20 million leakage, about half goes to other zones in East Lothian, especially to Musselburgh. There may be some risks to stores/ centres in these other zones by assuming any substantial clawback of leakage from them. The balance of leakage goes to centres outside East Lothian. So the high forecast allows for potentially recapturing half the leakage to centres outside East Lothian, which equates to 25% of the total leakage from Zone 2.

Table 6.2			
Musselburgh (Zone 1): spare convenience expenditure capacity			
	2015-20	2020-25	2015-25
	£million	£million	£million
(a) Current over- trading (Table 5.11)	5.8		5.8
(b) Growth in retained expenditure (turnover)- Table 5.4	1.1	4.1	5.2
(c) Less: convenience planning consents (Table 5.13)			
ASDA Tranent trade diversion: estimate 30% of £12.3 million turnover	-3.7		-3.7
Low estimate (a+b-c)	3.2	4.1	7.3
(d) Add: potential to reduce outflow			
Outflow £million- Table 5.4	2020 2025		
	-11.6 -12.3		
Potential to claw back up to 10% of leakage assumed	1.2	0.1	1.2
(e) Add: potential to increase inflow			
Inflow £million- Table 5.4	2020 2025		
	18.4 19.6		
Potential to increase inflow s- negligible	0	0	0
High estimate	4.4	4.2	8.5
Equivalent supermarket convenience floorspace			
* Turnover/ floorspace ratio	£ per sq m	£ per sq m	
	10,680	11,125	
	sq m net	sq m net	sq m net
Low	300	400	700
High	400	400	800
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 of Sainsbury's, Tesco, Morrisons and ASDA, at £10,637 per sq m. The ratio has been increased to relate to 2020 and 2025, based on % turnover growth in E Lothian from Table 5.10			

Table 6.3			
Prestonpans/Port Seton (Zone 2): spare convenience expenditure capacity			
	2015-20	2020-25	2015-25
	£million	£million	£million
(a) Current under- trading (Table 5.11)	-6.4		-6.4
(b) Growth in retained expenditure (turnover)- Table 5.5	-0.8	-0.1	-0.9
(c) Less: convenience planning consents (Table 5.13)			
ASDA Tranent trade diversion: estimate 5% of £12.3 million turnover	-0.6		-0.6
Low estimate (a+b-c)	-7.8	-0.14	-7.9
(d) Add: potential to reduce outflow			
Outflow £million- Table 5.5	2020 2025		
	-20.1 -20.0		
Potential to claw back up to 25% of leakage assumed	5.0	-0.03	5.0
(e) Add: potential to increase inflow			
Inflow £million- Table 5.5	2020 2025		
	4.3 4.3		
Potential to increase inflow s - negligible	0	0	0
High estimate	-2.7	-0.2	-2.9
Equivalent supermarket convenience floorspace			
* Turnover/ floorspace ratio	£ per sq m	£ per sq m	
	10,680	11,125	
	sq m net	sq m net	sq m net
Low	-700	0	-700
High	-300	0	-300
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 of Sainsbury's, Tesco, Morrisons and ASDA, at £10,637 per sq m. The ratio has been increased to relate to 2020 and 2025, based on % turnover growth in E Lothian from Table 5.10			

6.5.2 Even so, the level of under-trading in Prestonpans/ Port Seton means that there would still be no spare capacity with this additional potential claw-back. The scope is mainly for improvements to the quality of the existing offer. Prospects of achieving the potential clawback of leakage in Table 6.3 would depend more on development of a supermarket, which would also serve Tranent (Blindwells opportunity).

6.6 Tranent (Zone3) spare capacity

6.6.1 Table 6.4 shows that there is no forecast spare convenience expenditure capacity under the low forecast and minimal spare capacity under the high forecast. The new ASDA will substantially reduce the high outflows from Zone 3 and it is estimated that up to around 45% of the reduced leakage could be clawed-back by new convenience floorspace in Tranent. The recent arrival of ASDA in Tranent has probably met most consumer needs there, which is also supported by the Aldi store. So the potential to claw back leakage to the level indicated is probably generous, but may be achievable by a supermarket development which shares its catchment with Prestonpans (Blindwells opportunity).

6.6.2 The estimated proportion is not higher, because the town is close to the superstores in Edinburgh and Musselburgh, where the range and choice of goods is very high, so residents are likely to continue to shop in these stores. Furthermore, as a planning consideration, if the assumed proportion was much higher, the trade diversion may adversely affect stores in Musselburgh.

6.6.3 So the scope for additional convenience floorspace in Tranent is likely to support mainly small store developments and extensions to the existing supermarkets.

6.7 Haddington (Zone 4) spare capacity

6.7.1 Table 6.4 shows that the Sainsbury's consent will largely consume the existing over-trading after 2020 (assuming development in that period). It will also increase expenditure inflows to Haddington. In this case, it is more relevant to consider spare capacity over the next ten years under the

circumstances, rather than the five-year period. If the Sainsbury's store is developed, the residual spare expenditure capacity will be quite small. It would support some additional small store developments and extensions. With representation by Tesco, Aldi and a new Sainsbury's after 2020, there is little reason to suppose market pressure for anything more.

6.8 North Berwick (Zone 5) spare capacity

6.8.1 Following development of the proposed Aldi store, there will be minimal spare convenience expenditure in North Berwick, as the existing over-trading will be consumed, as indicated in Table 6.5.

6.9 Dunbar (Zone 6) spare capacity

6.9.1 There is some existing under-trading in Dunbar, as shown in Table 6.6. The development of Sainsbury's in Haddington and Aldi in North Berwick is likely to increase the expenditure outflows from Dunbar. There is no forecast spare capacity in Dunbar over the next ten years. The ASDA in Dunbar gives the town a good existing representation in terms of modern supermarket provision. The main opportunity is to strengthen the quality of the convenience shops in the town centre.

6.10 Policy implications

6.10.1 The study findings on forecast spare capacity indicate that it will be important to support improvements to the quality of shops in the town centres in East Lothian, rather than promotion of significant additional convenience floorspace. Issues associated with the Blindwells opportunity are addressed in section 8.

Table 6.4 Tranent (Zone 3): spare convenience expenditure capacity			
	2015-20 £million	2020-25 £million	2015-25 £million
(a) Current under- trading (Table 5.11)	-2.6		-2.6
(b) Growth in retained expenditure (turnover)- Table 5.6	-0.1	0.4	0.3
(c) Less: convenience planning consents (Table 5.13)			
ASDA Tranent trade diversion: estimate 5% of £12.3 million turnover	-0.6		-0.6
Sainsbury's Haddington: estimate 5% of £18.7m turnover		-0.9	-0.9
Low estimate (a+b-c)	-3.3	-0.6	-3.9
(d) Add: potential to reduce outflow			
2020 2025			
Outflow £million- Table 5.6		-32.5	-34.0
Outflow post ASDA- Table 5.13		-20.9	-22.3
Potential to claw back up to **46% of leakage post ASDA assumed	9.6	0.7	10.3
(e) Add: potential to increase inflow			
2020 2025			
Inflow £million- Table 5.6	0.3	0.3	
Potential to increase inflow s - negligible	0	0	0
High estimate	6.3	0.1	6.3
Equivalent supermarket convenience floorspace			
* Turnover/ floorspace ratio	£ per sq m 10,680	£ per sq m 11,125	
	sq m net	sq m net	sq m net
Low	-300	-100	-400
High	600	0	600
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 of Sainsbury's, Tesco, Morrisons and ASDA, at £10,637 per sq m. The ratio has been increased to relate to 2020 and 2025, based on % turnover growth in E Lothian from Table 5.10			
** The percentage also needed for consistency to sum with the East Lothian total in Table 6.1			

Table 6.5 Haddington (Zone 4): spare convenience expenditure capacity			
	2015-20 £million	2020-25 £million	2015-25 £million
(a) Current over- trading (Table 5.11)	15.6		15.6
(b) Growth in retained expenditure (turnover)- Table 5.7	0.2	1.9	2.0
(c) Less: convenience planning consents (Table 5.13)			
ASDA Tranent trade diversion: estimate 5% of £12.3 million turnover	-0.6		-0.6
Aldi N Berwick: estimate 25% of £7.1 million turnover	-1.8		-1.8
Sainsbury's Haddington: estimate 55% of £18.7m turnover		-10.3	-10.3
Low estimate (a+b-c)	13.4	-8.4	5.0
(d) Add: potential to reduce outflow			
2020 2025			
Outflow £million- Table 5.7		-4.5	-4.6
Outflow post Sainsbury's- Table 5.13			-2.2
Potential to claw back leakage post Sainsbury's assumed negligible	0	-1.6	-1.6
(e) Add: potential to increase inflow			
2020 2025			
Inflow £million- Table 5.7	20.0	20.9	
Inflow post Sainsbury's- Table 5.13		26.5	
Potential to increase inflow s- negligible post Sainsbury's		0	0
High estimate	13.4	-10.0	3.4
Equivalent supermarket convenience floorspace			
* Turnover/ floorspace ratio	£ per sq m 10,680	£ per sq m 11,125	
	sq m net	sq m net	sq m net
Low	1,300	-800	500
High	1,300	-900	400
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 of Sainsbury's, Tesco, Morrisons and ASDA, at £10,637 per sq m. The ratio has been increased to relate to 2020 and 2025, based on % turnover growth in E Lothian from Table 5.10			

Table 6.6			
North Berwick (Zone 5): spare convenience expenditure capacity			
	2015-20	2020-25	2015-25
	£million	£million	£million
(a) Current over- trading (Table 5.11)	4.2		4.2
(b) Growth in retained expenditure (turnover)- Table 5.8	0.2	0.7	0.9
(c) Less: convenience planning consents (Table 5.13)			
Aldi N Berwick: estimate 50% of £7.1 million turnover	-3.5		-3.5
Sainsbury's Haddington: estimate 10% of £18.7m turnover		-1.9	-1.9
Low estimate (a+b-c)	0.9	-1.2	-0.4
(d) Add: potential to reduce outflow			
Outflow £million- Table 5.8	2020	2025	
	-7.5	-7.7	
Outflow post Aldi & Sainsbury's- Table 5.13	-3.9	-6.0	
Potential to claw back leakage assumed negligible	0	0	0
(e) Add: potential to increase inflow			
Inflow £million- Table 5.8	2020	2025	
	3.4	3.4	
Potential to increase inflow s- negligible	0	0	0
High estimate	0.9	-1.2	-0.4
	a+b-c+d+e		
Equivalent supermarket convenience floorspace			
* Turnover/ floorspace ratio	£ per sq m	£ per sq m	
	sq m net	sq m net	sq m net
	10,680	11,125	
Low	100	-100	0
High	100	-100	0
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 of Sainsbury's, Tesco, Morrisons and ASDA, at £10,637 per sq m. The ratio has been increased to relate to 2020 and 2025, based on % turnover growth in E Lothian from Table 5.10			

Table 6.7			
Dunbar (Zone 6): spare convenience expenditure capacity			
	2015-20	2020-25	2015-25
	£million	£million	£million
(a) Current under- trading (Table 5.11)	-4.0		-4.0
(b) Growth in retained expenditure (turnover)- Table 5.9	0.2	0.8	1.0
(c) Less: convenience planning consents (Table 5.13)			
Aldi N Berwick: estimate 15% of £7.1 million turnover	-1.1		-1.1
Sainsbury's Haddington: estimate 15% of £18.7m turnover		-2.8	-2.8
Low estimate (a+b-c)	-4.8	-2.0	-6.8
(d) Add: potential to reduce outflow			
Outflow £million- Table 5.9	2020	2025	
	-10.2	-10.6	
Outflow post Aldi & Sainsbury's- Table 5.13	-11.2	-14.4	
Potential to claw back up to 10% of leakage assumed	1.1	0.3	1.4
(e) Add: potential to increase inflow			
Inflow £million- Table 5.9	2020	2025	
	3.0	3.1	
Potential to increase inflow s- negligible	0	0	0
High estimate	-3.7	-1.7	-5.4
	a+b-c+d+e		
Equivalent supermarket convenience floorspace			
* Turnover/ floorspace ratio	£ per sq m	£ per sq m	
	sq m net	sq m net	sq m net
	10,680	11,125	
Low	-500	-200	-600
High	-300	-100	-500
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 of Sainsbury's, Tesco, Morrisons and ASDA, at £10,637 per sq m. The ratio has been increased to relate to 2020 and 2025, based on % turnover growth in E Lothian from Table 5.10			

7 Comparison expenditure capacity

7.1 Introduction

7.1.1 This section sets out the comparison expenditure and turnover relationships for East Lothian and provides forecasts of spare capacity from 2015 to 2025.

7.2 Comparison expenditure potential

7.2.1 Table 7.1 shows the forecast expenditure per capita data for East Lothian, based on data commissioned from Pitney Bowes for this study.

7.2.2 As explained in section 5, 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, or non-store sales, is projected to increase up to 2025.

7.2.3 For comparison expenditure, the proportions of SFT are based on the findings of the household survey which reveals use of the internet for shopping by East Lothian residents, which is slightly higher than the UK average-see Appendix 5.

The increases in proportions of SFT to 2025 are based on the forecasts for the UK.

7.2.4 The total comparison expenditure potential of the residents of East Lothian is shown in Table 7.2.

7.3 Comparison shopping patterns

7.3.1 Information on comparison shopping patterns was collected by the 1,000 sample household survey referred-to in section 1, which covered East Lothian. The method is explained in section 6, except that the analysis is focussed on East Lothian as a whole, not the sub area zones. The list of questions is provided in Appendix 2. For each of the five categories of comparison goods in the questionnaire, the respondents were asked to identify where they visited most often to buy these goods (Q7-Q11). Respondents could identify up to two destinations (or internet) for each category. The results were weighted and combined to reveal the shopping patterns for all comparison goods, as shown in Appendix 6

Table 7.1
East Lothian residents' comparison expenditure per capita per annum (in 2014 prices)

2014 £	2015 £	2019 £	2020 £	2024 £	2025 £
3,335	3,444	3,879	3,972	4,441	4,550
*Excluding special forms of trading (SFT)					
	2,721		2,986		3,336

Sources;

Figures in bold are from the Pitney Bowes' projected expenditure data commissioned for the study area. Figures for the other years are interpolations/ extrapolations.

The figure for 2014 from Pitney Bowes is in 2014 prices. For the other years, Pitney Bowes provided forecasts in 2013 prices.

These have been adjusted to 2014 prices by a factor of 0.99501 from the *Retail Expenditure Guide 2015/16* by Pitney Bowes.

Deductions require to be made to allow for special forms of trading (SFT- internet expenditure ,mail order etc), which do not relate to conventional floorspace. On page 38 (Table 3.4) of the *Retail Expenditure Guide 2015/16* by Pitney Bowes, the following estimates of comparison SFT are made in relation to non- store sales.

2014	2015	2019	2020	2024	2025
17.2%	18.1%	20.9%	21.4%	22.8%	23.0%

The proportion from the household survey is slightly higher than the national average for 2015. For this study, the survey based proportion is applied for 2015, with the rate of increase to 2020 and 2025 based on the national average.

*Applied proportions: **21.0%** **24.8%** **26.7%**

Note that there is some overlap between non-store sales and store-related internet sales, so the proportions may be a bit lower than the proportions indicated above. However, there is no evidence of what the slightly lower levels might be (Pitney Bowes).

Table 7.2			
East Lothian residents' comparison expenditure potential (in 2014 prices) excluding special forms of trading			
	2015 £ million	2020 £ million	2025 £ million
Residents' expenditure potential	281.0	321.8	375.9
Note Derived from Table 7.1 and the population projections in Table 4.1			

7.3.2 The output tables produced by NEMS Market Research are available as a separate document. Figure 7.1 illustrates the most frequently mentioned destinations for each category of comparison goods (including the internet). Fort Kinnaird is easily the most popular destination for all the categories, followed by Edinburgh City Centre and the internet. The internet featured very strongly for personal goods- see Appendix 5.

7.3.3 While the survey findings indicate that 85% of comparison goods shopping by East Lothian residents was done in centres outside the Council area, it overestimates the outflows, because the retained expenditure would not support the current level of comparison floorspace.

7.3.4 One of the limitations of household surveys is that the response levels can understate the attraction to smaller centres and exaggerate the importance of the larger, more popular destinations. The effect can be more prominent in study areas where there are no major shopping centres, like East Lothian. Accordingly, an adjustment is made to assume that comparison expenditure outflows from East Lothian equate to 70% of the residents' expenditure, as applied in Table 7.3.

7.3.5 Bulky goods are part of the comparison goods category. They comprise *furniture, floorcoverings, furnishings, domestic appliances and DIY/ hardware, excluding china and glassware*. They represent about 14% of all comparison expenditure. Bulky goods sales are important in town centres, as well as in retail parks, so there is no need for separate forecasts for bulky goods.

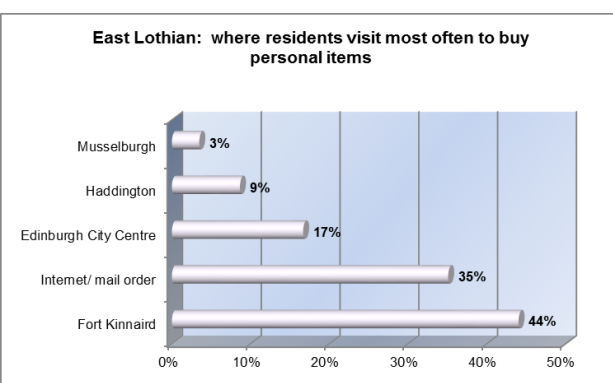
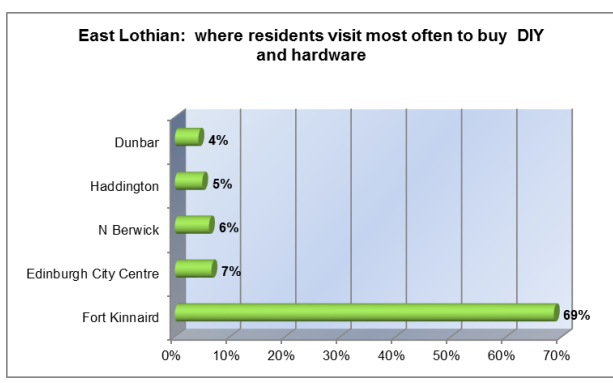
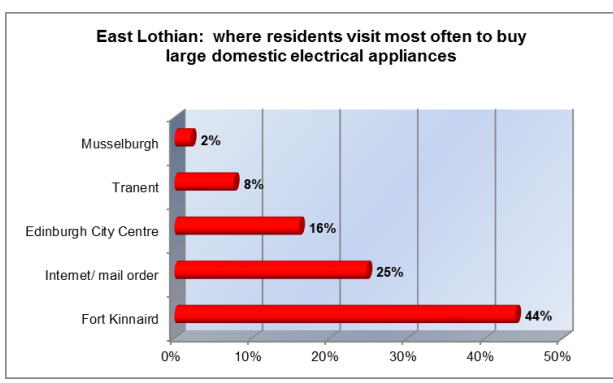
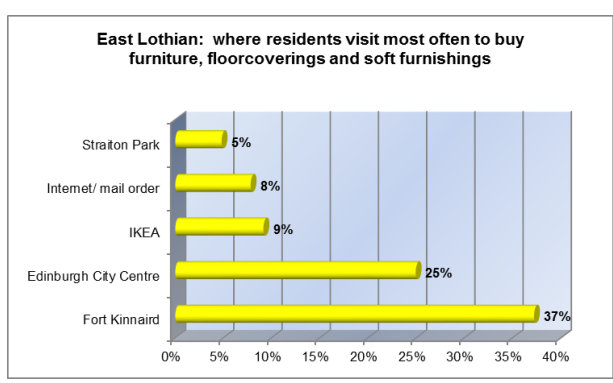
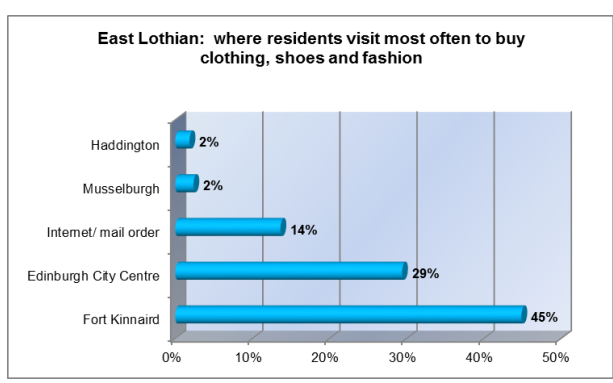
7.4 Expenditure and turnover in East Lothian

7.4.1 Table 7.3 shows the simple relationship between expenditure and turnover in East Lothian: *total expenditure plus inflows, minus outflows = turnover*. The Council area forms the basis for estimating the spare expenditure capacity. The inflows of comparison expenditure are quite minor, whereas the outflows are very high at 70%.

7.4.2 The distribution of comparison floorspace and turnover within East Lothian is shown on Table 7.4. The total is controlled to the survey based total in Table 7.3. Musselburgh is the largest centre. The other towns are smaller, with relatively less comparison floorspace. Comparison floorspace in supermarkets contributes significantly to the total.

Table 7.3				
East Lothian: comparison expenditure and turnover (in 2014 prices)				
		2015 £ million	2020 £ million	2025 £ million
East Lothian residents' expenditure potential		281.0	321.8	375.9
Add: (1) inflows	1%	3.2	3.6	4.2
Less: (2) outflows	-70%	-196.7	-225.3	-263.1
Retained expenditure (turnover)		87.4	100.2	117.0
Note (1) Based on the <i>East Lothian Visitor Survey 2011</i> . Total spend on shopping £3.61m. Allowance for up to £4.5m by 2015. Estimated 70% spend on comparison goods (2) The proportion derived from the household survey, adjusted from 85% to 70%- see text.				

Figure 7.1 Main destinations for comparison goods shopping



Internet retail spending by category

See Appendix 5

7.5 Quality of shops

7.5.1 In the household survey, the respondents were asked to rate the quality of shops in the main town centre relating to the zone in which they lived, as 'good', 'average' or 'poor'. The rating included all shops (convenience and comparison). For **Musselburgh**, 16% of respondents rated the quality of shops as good, and 46% rated the quality as average, with 36% saying poor.

7.5.2 For **Prestonpans/ Port Seton**, the ratings were good (25%), average (49%) and poor (22%). For **Tranent**, the ratings were good (16%), average (44%) and poor (38%). For **Haddington**, the ratings were good (53%), average (41%) and poor (6%). For **North Berwick**, the ratings were good (76%), average (24%), and poor (0.6%). For **Dunbar**, the ratings were good (39%), average (48%) and poor (12%).

Table 7.4				
East Lothian: comparison floorspace and turnover, 2015 (in 2014 prices)				
	Floorspace sqm		Turnover ratio £/sq m	Turnover £million
	gross	net		
Musselburgh primary catchment (Zone 1)				
Musselburgh Town Centre	10,983	6,590	3,400	22.4
Tesco Extra, Mall Ave- (total 8,645 sq m gross- 30% comp)	2,594	1,556	6,391	9.9
Lidl, Olivebank (total 1,606 sq m gross- 15% comp)	241	181	5,051	0.9
Aldi, Olivebank (total 1,184 sq m gross- 15% comp)	178	133	9,458	1.3
Wallyford	152	91	2,700	0.2
Total	14,147	8,551		34.8
Prestonpans/ Port Seton primary catchment (Zone 2)				
Prestonpans Town Centre	675	405	2,700	1.1
Lidl, Prestonpans (total 1,668 sq m gross- 15% comp)	250	188	5,051	0.9
Cockenzie & Longniddry	530	318	2,700	0.9
Total	1,456	911		2.9
Tranent primary catchment (Zone 3)				
Tranent Town Centre	3,353	2,012	3,000	6.0
ASDA, Tranent (newly opened just after HH survey)				
Aldi, Tranent (total 1,350 sq m gross- 20% comp)	270	203	9,458	1.9
Original Factory Shop	1,132	906	2,000	1.8
Total	4,755	3,120		9.8
Haddington primary catchment (Zone 4)				
Tesco, Newton Port (total 3,687 sq m gross-10% comp)	369	203	6,391	1.3
Other Haddington Town Centre shops	5,428	3,257	3,200	10.4
Aldi, Whittingehame Dr (total 1,354 sq m gross- 20% comp)	271	203	9,458	1.9
Total	6,067	3,663		13.6
North Berwick primary catchment (Zone 5)				
North Berwick Town Centre	4,597	2,758	3,500	9.7
Tesco, Tantallon Rd (total 2,763 sq m gross- 10% comp)	276	166	6,391	1.1
Gullane	740	444	3,000	1.3
Total	5,613	3,368		12.0
Dunbar primary catchment (Zone 6)				
Dunbar Town Centre (incl. Original Factory Shop)	5,223	3,134	3,000	9.4
ASDA, Spott Road 4,039 sq m gross incl home shopping collection				
Total retail 3,252 sq m gross-35% comp	1,138	650	7,584	4.9
East Linton	45	27	2,700	0.1
Total	6,406	3,811		14.4
Total East Lothian	38,443	23,422		87.4
Note				
Gross floorspace provided by the Council from 2015 surveys.				
Turnover/ floorspace ratios are estimates by R MacLean. For the supermarkets, the turnover ratios relate to the comparison element of the turnover ratios published in the Retail Rankings 2015. For the town centres and other stores, the turnover ratios derive from average levels in other studies.				

7.6 Planning consents

7.6.1 As explained in section 6, the estimated turnover relating to planning consents requires to be deducted from the forecasts of spare capacity.

7.6.2 The list of comparison goods related consents refers to the comparison floorspace in the supermarket consents in East Lothian, as

shown in Table 7.5. The level is fairly insignificant.

Table 7.5 Comparison floorspace in East Lothian: consents and recent openings 2015 (in 2014 prices)				
	Floorspace sq m		Turnover ratio £/sq m	Turnover £million
	gross	net		
Consents				
(a) ASDA, Haddington Rd, Tranent (total 1,846 sq m gross- 5% comp) (recently opened - after the household survey)	92	55	7,584	0.4
(b) Aldi, Dunbar Rd, North Berwick (total 1,175 sq m gross- 15% comp) (not opened yet- former Co-op unit)	176	132	9,458	1.3
Sainsbury's, Gateside, Haddington-11/00729/PPM Site works part implemented. Total 3,700 sq m gross, 2,355 sq m net Condition- max 471 sq m net (20%) for sale of comparison goods	740	471	6,432	3.0
(c) * Sainsbury's turnover in 2020				3.5
Total turnover of consents (a+b+c)				5.1
Proportion diverted from East Lothian stores (estimated at 30%)				1.5
Note				
Gross floorspace from the Council. Estimated turnover based on company averages from the 2015 Retail Rankings				
* If developed, the Sainsbury consent might feasibly be operational close to 2020, so the estimated turnover in 2015 has been adjusted upwards by the forecast % growth in turnover in East Lothian from 2015-20 (Table 7.3)				

7.7 Comparison expenditure capacity

7.7.1 As explained at the beginning of section 6, 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

7.7.2 A range of spare capacity can be prepared from these components, showing a low and high estimate, after deducting planning commitments. The **low estimate** includes any over-trading and the forecast growth in expenditure in the catchment over the target periods, less planning consents. The **high estimate** also includes the potential to claw back leakage and attract new trade into the catchment. Note that the high range for each zone includes limits imposed by consideration of possible adverse levels of additional trade deflection from other zones from a planning perspective.

7.7.3 Table 7.6 sets out the range of spare comparison expenditure capacity for East Lothian for 2015-25.

7.7.4 Under the low forecast, there would be spare expenditure capacity of around £11 million up to 2020, rising to £28 million from 2015-2025. Forecast growth in comparison expenditure underpins these estimates. We have split the small turnover relating to planning consents between the five-year periods as it is insignificant and would add needless complexity to the table.

7.7.5 Under the high forecast, it is assumed that a small proportion of the leakage could be retained in East Lothian. The reason is that East Lothian does not have any major shopping centres, and both consumer and retailer demand for comparison goods is concentrated in the largest centres. This allowance raises the spare capacity to £22 million up to 2020 and up to £41 million from 2015-25. As previously stated, a small proportion has been assumed to correspond with our views on the market, set out in section 3.

7.7.6 The indicative net retail floorspace associated with the expenditure capacity forecasts are provided in Table 7.6. As mentioned in section 6, more weight should be given to the expenditure figures, because retailer performance and formats varies widely.

7.8 Interpretation

7.8.1 Against the background of retail market conditions and trends described in section 3, the high forecasts in Table 7.6 seem unlikely to be achieved in East Lothian. It is more probable that leakage of comparison expenditure to major destinations outside East Lothian will increase.

7.8.2 Furthermore, in the opinion of this author, the proportion of internet shopping for comparison goods may also increase substantially beyond current forecasts by various agencies. While the possibility of an additional increase is not supported by direct evidence, the slow rate of development of new comparison retail floorspace, alongside growth in expenditure, suggests that trends in internet shopping are having a major effect.

7.8.3 What Table 7.6 indicates is that there is substantial forecast comparison expenditure growth relating to the residents of East Lothian, so capacity itself would not be a barrier to the scale of new comparison retail development that might be realised in the Council area, which is likely to be relatively small scale.

7.9 Policy implications

7.9.1 The main issue will be to support the existing comparison retail floorspace in the town centres in East Lothian, through encouraging improvements to the quality and range of comparison shopping, in conjunction with other measures to improve the attractiveness of the town centres as destinations.

Table 7.6			
East Lothian: spare comparison expenditure capacity up to 2025 (in 2014 prices)			
	2015-20	2020-25	2015-25
	£million	£million	£million
(a) Growth in retained expenditure (turnover)- Table 7.3	12.7	16.8	29.5
(b) Less planning commitments	-1.5		-1.5
Low estimate (a+b)	11.2	16.8	28.0
(c) Add: potential to reduce outflow			
Outflow £million- Table 7.3	2020 -225.3	2025 -263.1	
Potential to claw back up to 5% of leakage assumed	11.3	1.9	13.2
(d) Add: potential to increase inflow			
Inflow £million- Table 7.3	2020 3.6	2025 4.2	
Potential to increase inflow s- negligible	0	0	0
High estimate	22.4	18.7	41.2
Equivalent comparison floorspace			
* Turnover/ floorspace ratio	£ per sq m 3,665	£ per sq m 4,281	
	sq m net 3,000	sq m net 3,900	sq m net 7,000
Low			
High	6,100	4,400	10,500
Note			
Gross equivalent floorspace estimates have not been shown, as net /gross formats vary widely. Figures are rounded			
* The turnover ratio derives from consideration of existing comparison turnover ratios in the E Lothian town centres and also ratios that would relate to retail parks generally (£3,200 per sq m net in 2015)			
The ratio has been increased to relate to 2020 and 2025, based on turnover growth in E Lothian from Table 7.3			

8 Blindwells and Bleachingfield

8.1 Introduction

8.1.1 The consultancy brief seeks advice on opportunities at Blindwells and also for the Bleachingfield site in Dunbar.

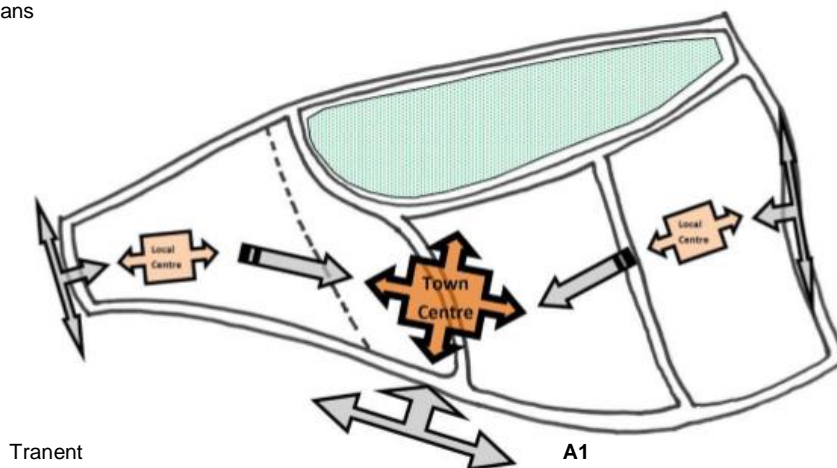
8.2 Blindwells

8.2.1 With the proposed expansion of housing at Blindwells to create a new settlement, the Council is examining the options for development of a new town centre, including

retailing, at Blindwells. As mentioned earlier in this study, this includes consideration of its potential role in the hierarchy of centres. Among the issues is whether the proposed new centre should aim to serve the local area, or a much wider area. At the same time, it should be recognised that Blindwells will take decades to expand fully.

8.2.2 The site is strategically well-placed in terms of accessibility to the whole of East Lothian, being close to the A1 by Tranent. A diagram from the Local Development Plan MIR is shown below, illustrating a concept layout.

Prestonpans



8.3 Convenience retailing opportunities

8.3.1 Development of a new centre at Blindwells offers an opportunity to serve the residents of both Prestonpans/ Port Seton and Tranent (Zones 2 and 3), as it is readily accessible to both areas.

8.3.2 In Tables 6.3 and 6.4, the potential combined clawback of convenience expenditure leakage for the two zones is estimated at around £15 million, which may be more achievable by a future supermarket development at Blindwells. The potential level of turnover would equate to a supermarket of around 2,800 sq m gross/ 1,700 sq m net for

example, assuming that about 90% of the area is devoted to sales of convenience goods. There would also be some risk of trade diversion from the Prestonpans and Tranent town centres, neither of which are trading strongly.

8.3.3 Current market conditions are not promising for general supermarket developments, so the opportunity may relate to at least five to ten years ahead. Therefore, in the early years of residential expansion at Blindwells, it would be prudent to plan for a small local convenience store, with some non-retail service units, to serve the immediate local population of Blindwells itself.

8.3.4 Other possible opportunities might include the food discounters or even M&S Simply Food, provided the site is visible from the A1. It is impossible to speculate about company interests, but there is already representation by Aldi and Lidl in the West Sector.

8.4 Comparison retailing opportunities

8.4.1 The analysis of comparison shopping patterns indicates that around £200 million expenditure is leaving East Lothian currently, and this will rise substantially in line with forecast growth in expenditure.

8.4.2 On the potential for development of a major non-food retail development at Blindwells, a key factor is that it is located relatively close to the attractions of Fort Kinnaird shopping centre and retail park. It is only just over six miles or 11 minutes' drive time from Fort Kinnaird. The very good accessibility afforded by the A1 means that people from East Lothian will continue to go there. In other words, it is probably too close for any major comparison retail development at Blindwells to succeed.

8.4.3 Also, Fort Kinnaird is the largest shopping centre serving eastern Edinburgh and East/ Mid Lothian, with the large range and choice of multiple outlets and leisure elements needed to service the wide catchment. As referred-to earlier in this study, multiple retailer demand is mostly focussed on the largest centres only and consumer demand seeks the widest choice and sophistication.

8.4.4 **Large retail developments-** from recent retail studies in Central Scotland, confirmed retailer demand to locate in proposed extensions to the largest malls in Glasgow and Dundee for example, is slow, so it is likely to be virtually non-existent for a much smaller development on an isolated site fairly close to a major shopping centre. There is little evidence of new mall developments or new retail parks progressing in Scotland in recent years. Until the investment market in retail/ leisure changes, the prospects for securing a major retail development at Blindwells appear low, especially more so against the rise in internet retailing.

8.4.5 **Retail parks-** there are many retail parks trading successfully in Scotland and

demand is picking up, after an extended flat period. There is limited evidence of demand for entirely new retail parks though. Again, the issue of proximity to Fort Kinnaird is likely to prove an obstacle to the prospects for Blindwells. Nor would a retail park offer obvious support for a new town/ local centre serving an expanding community at Blindwells.

8.4.6 **Visitor related retailing-** although the site is beside the A1, it has no backdrop against which to provide for visitors, compared to the attractions of the small historic towns in East Lothian.

8.5 Suggested town centre format

8.5.1 From the appraisal, provision for development of a local centre to mainly serve the expanding population at Blindwells appears the most likely scenario to succeed. This would contain mostly convenience and non-retail services (pharmacies, cafés etc), and a small element of comparison shopping. If market conditions change, there would be capacity to support a supermarket.

8.6 Bleachingfield

8.6.1 The site of interest in this report is an area of land off Countess Crescent, near Dunbar town centre. It contains the Co-op, The Original Factory Shop and two car parking areas, as indicated in the picture overleaf. Surrounding uses include housing, open space and the Bleachingfield Community Centre.

8.6.2 The issue is whether this is a good location for possible additional retailing in the future. It is close to the town centre, therefore potentially supportive in terms of ready accessibility. However, the site is located in a back area which is invisible from the High Street. In the circumstances, this would not be a problem for attracting local customers, but it would be less obvious to visitors.



8.6.3 The area could be described as an edge of centre site. It may have potential to accommodate some retail development in the future, but this opportunity should not be allowed to conflict with the retail offer in the town centre. It has potential to accommodate larger space users who could not otherwise be located in the town centre.

8.6.4 The provisions of the sequential test would need to be applied to any proposed retail developments on the site, to ensure that the vitality and viability of the town centre is not threatened. For example, small unit development proposals would not generally be consistent with this advice, unless there was some special case.

8.6.5 There are no other obvious sites of this scale within or adjacent to the town centre which have potential to accommodate retailing. In the view of this report, there is some merit in retaining the opportunity for future retail development which is supportive of the town centre. The opportunity would otherwise be lost if the land is developed for some other use.

9 Conclusions

9.1 The Capacity Study

9.1.1 The Retail Capacity Study contains forecasts of spare convenience and comparison retail expenditure for East Lothian for the five and ten year periods 2015-2020 and 2015-25. For convenience retailing, capacity forecasts were made for the Council area and each of six zones within the Council area, which represent the primary catchments of the main towns: Musselburgh, Prestonpans/ Port Seton, Tranent, Haddington, North Berwick and Dunbar. For comparison retailing, the capacity forecasts are for the Council area only.

9.1.2 A range of capacity forecasts are made. The *low* forecast includes forecast retained expenditure growth (and any over-trading in the case of convenience capacity). The *high* forecast allows for the potential to claw back leakage and attract new inflows, in addition to the low forecast. Both forecasts exclude expenditure absorbed by planning commitments.

9.2 Convenience expenditure capacity

9.2.1 The convenience expenditure potential of the residents of East Lothian is currently some £222 million, which is forecast to rise to £230 million by 2025. Outflows of convenience expenditure from the Council area equate to 19% of the residents' expenditure, most of which goes to stores in Edinburgh, including ASDA at The Jewel and others. Inflows of expenditure are small, at only 2%.

9.2.2 Among the six zones, the inflows and outflows vary widely. Musselburgh attracts significant inflows from the Prestonpans/ Port Seton zone from some from Tranent. The outflows of expenditure from Tranent and Prestonpans to Edinburgh is also high. Haddington attracts high inflows and it has a high level of retention of convenience expenditure. North Berwick also has a high level of expenditure retention, with some leakage to Haddington. Dunbar has a fairly high retention, but with significant leakage to Haddington.

9.2.3 For East Lothian as a whole, there will be no spare capacity up to 2025 under the

low forecast, and fairly small spare capacity under the high forecast (less than £10 million), assuming the existing planning commitments are developed.

9.2.4 Among the six zones, the forecasts of spare convenience capacity are minimal or very low. Expenditure leakage to Edinburgh is highest in the Tranent zone, with significant levels from Prestonpans and Musselburgh. The potential to claw back this leakage will be limited by the proximity of Edinburgh.

9.2.5 In fact, East Lothian is fairly well provided-for in terms of supermarkets, including discount foodstores. The development market has moved away from large mainstream supermarkets to mid-size and small convenience stores (1,300 sq m net to 300 sq m net). The low level of forecast spare capacity would support small store developments and extensions, which happens to be consistent with market trends in any case.

9.2.6 On the Blindwells opportunity, there would be potential capacity to support a supermarket of around 2,800 sq m gross/ 1,700 sq m net in the period five-ten years in the future by drawing on the populations of Prestonpans and Tranent. However, a prudent outlook would be to promote a small convenience store development in the initial years of the residential expansion of Blindwells. The scale would be within the range indicated in the previous paragraph, as part of a local centre with some additional small units, probably accommodating non-retail service uses and perhaps a pharmacy for example.

9.3 Comparison expenditure capacity

9.3.1 The comparison expenditure potential of the residents of East Lothian is currently some £281 million, which is forecast to rise to £376 million by 2025. Outflows of convenience expenditure from the Council area equate to 70% of the residents' expenditure or over £200 million.

9.3.2 Forecast comparison expenditure growth rates are much higher than for those for convenience expenditure. So under the low

forecast, there is up to £28 million spare capacity to 2025.

9.3.3 Under the high forecast, the main issue is the potential to claw back leakage. In our view, the potential to claw back leakage will be low, because people from East Lothian will continue to shop in Edinburgh because of the range and choice of retailing in Fort Kinnaird and the City Centre and other centres.

9.3.4 Market trends generally are showing an increasing focus on the major cities by the major multiples. In the high forecast, allowance for up to 5% claw back of leakage is included. This raises the forecast spare capacity to some £41 million by 2025. We have reservations that this could realistically be achieved. Furthermore, the rise in internet retail spending may be greater than generally predicted at the moment. In that event, retail floorspace requirements would be lower than predicted at the moment.

9.3.5 The implications for developing a major comparison retail centre at Blindwells are that it is unlikely to succeed, as Blindwells is too close to Fort Kinnaird and Edinburgh generally and that the major multiple retailers are unlikely to want representation in this location. Nor does the potential for developing a new retail park as there is limited evidence of demand for new retail parks.

9.3.6 On the Bleachingfields site in Dunbar, we consider that it has potential for accommodating operators who cannot physically be accommodated in the town centre, provided the retail offer would not compete with the town centre.

Appendix 1

Distribution of projected population by planned new housing development

The table below is adjusted by the planned housing completions to provide Table 4.1 in the text. The projected East Lothian population for 2015, 2020 and 2025 by the Register General is applied to the Council area, with the differentiated growth in each Zone based on the planning new housing, controlled to the projected Council area totals by the Registrar General.

East Lothian Council area: population projections with apportionment to the zones based on their Census populations (not applied in this report)					
Zone	Local retail catchment area	Census 2011	2015	2020	2025
1	Musselburgh	24,998	25,891	27,019	28,249
2	Prestonpans/ Port Seton	17,540	18,166	18,958	19,821
3	Tranent	18,396	19,053	19,883	20,789
4	Haddington	12,931	13,393	13,976	14,613
5	North Berwick	12,515	12,962	13,527	14,143
6	Dunbar	13,337	13,813	14,415	15,072
Total East Lothian Council area		99,717	103,278	107,779	112,686
Note					
Local retail catchment populations are from the 2011 Census based on Ward areas					
The RG 2012 based population projections for East Lothian Council area are applied for 2015, 2020 and 2025, with apportionment to the local catchment areas, based on their populations.					

Distribution of existing housing land and preferred new housing opportunities in the MIR 2014						
Zone	Cluster	MIR Ref.	2009-19	% (apply as pop grow th distribution)	2019-24	% (apply as pop grow th distribution)
1	Musselburgh	Table 13	1,827	37%	1,879	41%
2	Prestonpans/ Port Seton/ Cockenzie/ Longniddry	Table 15	134	3%	20	0%
3	Tranent	Table 17	712	14%	590	13%
3	Blindwells	Table 26	0	0%	363	8%
4	Haddington	Table 19	723	15%	657	14%
5	North Berwick	Table 23	779	16%	457	10%
6	Dunbar	Table 21	810	16%	606	13%
Total East Lothian Council area			4,985	100%	4,572	100%
Note						
The above figures refer to the existing housing land supply plus the preferred allocated site opportunities to 2024						

See copy of Table 4.1 overleaf

Table 4.1**East Lothian Council area: population projections with apportionment to the zones in 2020 and 2025 based on the housing land provisions in the MIR 2014**

Zone	Primary catchment area	Census 2011	(2) 2015	(2) 2020	(3) 2025
1	Musselburgh	24,998	26,303	27,953	29,969
2	Prestonpans/ Port Seton	17,540	17,636	17,757	17,778
3	Tranent	18,396	18,905	19,547	20,570
4	Haddington	12,931	13,447	14,100	14,805
5	North Berwick	12,515	13,071	13,775	14,265
6	Dunbar	13,337	13,916	14,647	15,297
(1) Total East Lothian Council area		99,717	103,278	107,779	112,686

Note

Local retail catchment populations are from the 2011 Census based on Ward areas, as shown in Figure 4.1

(1) The totals for 2015, 2020 and 2025 are from the RG 2012 based population projections for E Lothian

(2) Apportionment to the zones in 2015 and 2020 is based on the existing and preferred allocated new housing land supply for 2009-19 in the MIR 2004- see Appendix 1

(3) As above for 2025, based on the MIR housing land supply for 2019-24

Appendix 2

Household telephone interview survey- sample quotas and list of questions

Q01	Where did you last do your MAIN FOOD shopping for the household?
Q01A	Which internet retailer did you use for your main food shopping (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 for your main food shopping, the time before last (Q02)?
Q03	Where did you last go to do small, day-to-day TOP-UP food shopping?
Q03A	Which internet retailer did you use for your top- up shopping (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? [MR]
Q07	Moving on to NON-FOOD shopping, where do you most often buy clothes, shoes and other fashion items? You can mention up to two answers. [MR]
Q08	Where do you most often buy furniture, floor coverings and soft furnishings? You can mention up to two answers. [MR]
Q09	Where do you most often buy large domestic electrical appliances (such as fridges, washing machines, vacuum cleaners etc.)? You can mention up to two answers. [MR]
Q10	Where do you most often buy DIY and hardware goods? You can mention up to two answers. [MR]
Q11	Where do you most often buy other items of a mainly personal nature, such as sports goods, jewellery, books, toys, computers, mobiles, cameras, electronic games etc.? You can mention up to two answers. [MR]
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? [MR] <i>Those who never use the Internet for non-food shopping at Q12:</i>
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? [MR] <i>Those who use the Internet for non-food shopping in Q12</i>
Q15	Looking to the future, how frequently do you intend to use the Internet for non-food shopping? [PR]
	The respondents were asked about the main town centre in the zone in which they live : <i>Musselburgh, Prestonpans, Tranent ,Haddington, North Berwick, Dunbar</i>
Q16	Thinking about Town Centre, how often do you visit it, on average?
Q17	How do you normally travel to Town Centre?
Q18	What typically, are your main reasons for visiting Town Centre - i.e. what range of things do you do when you get there? (MR)
Q19	On average, how long do you normally spend in Town Centre when you visit?
Q20	What do you LIKE MOST about Town Centre for shopping and as a place to visit generally? [MR]
Q21	What do you DISLIKE MOST about Town Centre for shopping and as a place to visit generally? [MR]
Q22	Overall, how do you rate Town Centre on the following aspects as 'Good', 'Average' or 'Poor'? [MR/PR] <i>Range and choice of shops</i> <i>Quality of shops</i> <i>Town centre environment</i> <i>Parking availability</i> <i>As a pleasant place to visit</i>
Q23	What improvements to Town Centre would make you visit there more often? [MR]
Q24	How often do you buy locally-sourced produce, such as fruit and vegetables for example, in Town Centre? [PR]
Q25	Overall, do you think Town Centre is <i>getting better/staying about the same/ getting worse/ don't know</i> ? [PR]
Q26	Compared to two years ago, how frequently do you visit Town Centre now? [PR] <i>More often/ about the same/ less often/ don't know</i>
Q27	On average, how often do you visit Town Centre in the evenings - i.e. after 6pm?
Q28	Do you undertake any of the following leisure related activities when you visit Town Centre in the evenings? [MR/PR] <i>Buy take-aways</i> <i>Visit pubs / wine bars</i> <i>Visit community cinema or theatre</i> <i>Walking about / strolling</i> <i>Use sports halls or gyms</i> <i>Swimming</i> <i>Community hall activities / meetings</i> <i>Late shopping (when open)</i> <i>Indoor bowling</i> <i>Other</i>
Q29	What would make you visit Town Centre more often in the evenings? [MR]
GEN	Gender of respondent.
AGE	Which of the following age ranges do you fall in to?
PC	Postcode sector of home address
Note: <i>MR means multiple responses allowed. PR means prepared response (choice from specified options)</i>	

Zone	Electoral Ward	Population		Survey Quotas	
		2011 Census	%	rounded	
1	Musselburgh West plus Musselburgh East and Carberry	24,998	25%	251	250
2	Preston/Seton/Gosford	17,540	18%	176	175
3	Fa'side	18,396	18%	184	185
4	Haddington & Lammermuir	12,931	13%	130	130
5	North Berwick Coastal	12,515	13%	126	125
6	Dunbar & East Linton	13,337	13%	134	135
Total - East Lothian Council area		99,717	100%	1,000	1,000

Appendix 3

Convenience shopping patterns from the household survey

The tables below show how the shopping patterns for convenience shopping were derived from the questions on main food shopping and top-up shopping in the NEMS household survey. These underpin Table 5.3. The data outputs were weighted by NEMS and filtered as indicated in the footnotes.

Q1&Q2 combined: Where visited last, and the time before that, to do main food shopping							
	Origin						Total
	Zone 1 Musselburgh	Zone 2 Prestonpans	Zone 3 Tranent	Zone 4 Haddington	Zone 5 N Berwick	Zone 6 Dunbar	
Destination							
Zone 1	77%	24%	19%	0%	1%	4%	27%
Zone 2	0%	35%	10%	0%	2%	0%	8%
Zone 3	0%	0%	9%	0%	0%	0%	2%
Zone 4	0%	7%	13%	83%	19%	30%	21%
Zone 5	0%	3%	0%	2%	70%	3%	10%
Zone 6	1%	0%	3%	2%	1%	61%	9%
Outside study area	21%	31%	46%	13%	7%	2%	22%
Total	100%	100%	100%	100%	100%	100%	100%
Note The above data relates to the weighted survey data and filtered to remove don't know s, varies, internet and mail order							

Q3: Where visited last to do small day-to-day top up shopping							
	Origin						Total
	Zone 1 Musselburgh	Zone 2 Prestonpans	Zone 3 Tranent	Zone 4 Haddington	Zone 5 N Berwick	Zone 6 Dunbar	
Destination							
Zone 1	90%	3%	13%	1%	0%	0%	25%
Zone 2	1%	86%	4%	0%	3%	0%	17%
Zone 3	1%	2%	61%	1%	0%	0%	11%
Zone 4	0%	1%	11%	92%	4%	9%	17%
Zone 5	0%	3%	1%	1%	87%	4%	12%
Zone 6	0%	0%	3%	1%	3%	86%	13%
Outside study area	8%	5%	6%	4%	3%	1%	5%
Total	100%	100%	100%	100%	100%	100%	100%
Note The above data relates to the weighted survey data and filtered to remove don't know s, varies, internet and mail order							

East Lothian residents- all convenience shopping patterns (Q1-Q3 combined)

Origin							
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
	Musselburgh	Prestonpans	Tranent	Haddington	N Berwick	Dunbar	
Destination							
Zone 1	80%	20%	17%	0%	0%	3%	27%
Zone 2	0%	45%	9%	0%	2%	0%	10%
Zone 3	0%	0%	19%	0%	0%	0%	4%
Zone 4	0%	6%	13%	85%	16%	26%	20%
Zone 5	0%	3%	0%	2%	74%	3%	11%
Zone 6	1%	0%	3%	2%	1%	66%	10%
Outside study area	19%	26%	38%	12%	6%	2%	19%
Total	100%	100%	100%	100%	100%	100%	100%
Note							
The weighting assumes 80%:20% main food: top shopping							

Appendix 4

Convenience expenditure inflows and outflows by zone

Residents' expenditure potential by Zone 2015	Zone 1 £ million	Zone 2 £ million	Zone 3 £ million	Zone 4 £ million	Zone 5 £ million	Zone 6 £ million		
	56.6	37.9	40.6	28.9	28.1	29.9		
Destination	Origin- inflows from:						Total inflow	
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	from rest of E Lothian £ million	from outside E Lothian £ million
Musselburgh		20%	17%	0%	0%	3%	15.7	2.5
Prestonpans/ Port Seton	0%		9%	0%	2%	0%	4.5	
Tranent	0%	0%		0%	0%	0%	0.3	
Haddington	0%	6%	13%		16%	26%	19.6	0.3
North Berwick	0%	3%	0%	2%		3%	3.0	0.3
Dunbar	1%	0%	3%	2%	1%		2.6	0.3
Centres outside E Lothian	19%	26%	38%	12%	6%	2%	41.5	

	Origin						Total E Lothian
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	
Retained expenditure by zone	80%	45%	19%	85%	74%	66%	81%
Outflows	20%	55%	81%	15%	26%	34%	19%

Inflows from outside E Lothian

Visitor spending

Total spend on shopping 2011:

£3.61m

(E Lothian Visitor Survey 2011, page 48)

Allowance for increase to 2015

£4.5m

Estimated proportion on convenience shopping 30%

£1.35m

(estimate divided among Musselburgh/Haddington /N Berwick/ Dunbar at £0.34m each)

From Scottish Borders

Estimate negligible from Borders Retail Study 2011

From Midlothian

Midlothian Retailing & Town Centres Study 2013

Table 16- expenditure in Musselburgh

£2.13 m

Appendix 5

Internet and mail order spending on comparison goods- East Lothian household survey

Special forms of trading (SFT)- internet and mail order from the household survey

Clothing, shoes and fashion	13.6%
Furniture, floorcoverings & furnishings	7.8%
Large domestic appliances	24.7%
DIY and hardware	3.7%
Personal goods	29.9%
All comparison goods	21.0%

Weighting- from Pitney Bowes expenditure per capita data for East Lothian

All comparison shopping	
Clothing, shoes and fashion	31.0%
Furniture, floorcoverings & furnishings	12.6%
Large domestic appliances	3.3%
DIY and hardware	3.5%
Personal goods	49.5%
Total comparison expenditure	100.0%
Comparison expenditure per capita in 2014 in 2014 prices	£3,335

Note

Under the DIY and hardware category, china, glass and cutlery has not been included

Appendix 6

Comparison shopping patterns- East Lothian household survey

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

East Lothian centres and stores	7%
Centres and stores outside East Lothian	93%
Total	100%

Note

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

Q8 Most visited centre for buying furniture, floorcoverings and soft furnishings**Destination**

East Lothian centres and stores	10%
Centres and stores outside East Lothian	90%
Total	100%

Note

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

Q9 Most visited centre for buying large domestic electrical appliances, such as fridges, washing machines, vacuum cleaners etc**Destination**

East Lothian centres and stores	16%
Centres and stores outside East Lothian	84%
Total	100%

Note

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

Q10 Most visited centre for buying DIY and hardware**Destination**

East Lothian centres and stores	19%
Centres and stores outside East Lothian	81%
Total	100%

Note

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

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

East Lothian centres and stores	22%
Centres and stores outside East Lothian	78%
Total	100%

Note

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

Weighting- from Pitney Bowes expenditure per capita data for East Lothian**All comparison shopping**

Clothing, shoes and fashion	31.0%
Furniture, floorcoverings & furnishings	12.6%
Large domestic appliances	3.3%
DIY and hardware	3.5%
Personal goods	49.5%
Total comparison expenditure	100.0%
Comparison expenditure per capita in 2014 in 2014 prices	£3,335

Note

Under the DIY and hardware category, china, glass and cutlery has not been included

East Lothian all comparison shopping patterns Q7-Q11 combined**Destination**

East Lothian centres and stores	15%
Centres and stores outside East Lothian	85%
Total	100%

Note

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

The outflows have been adjusted down to **70%** in the study, because the retained expenditure would not support the existing floorspace with 85% outflows. Household surveys tend to exaggerate the main shopping destinations, which in this case are mostly outside East Lothian.

Appendix 7

Town Centre Health Check Indicators in the 2014 SPP

Annex A – Town Centre Health Checks and Strategies

Town centre health checks should cover a range of indicators, such as:

Activities

- retailer representation and intentions (multiples and independents);
- employment;
- cultural and social activity;
- community activity;
- leisure and tourism facilities;
- resident population; and
- evening/night-time economy.

Physical environment

- space in use for the range of town centre functions and how it has changed;
- physical structure of the centre, condition and appearance including constraints and opportunities and assets;
- historic environment; and
- public realm and green infrastructure.

Property

- vacancy rates, particularly at street level in prime retail areas;
- vacant sites;
- committed developments;
- commercial yield; and
- prime rental values.

Accessibility

- pedestrian footfall;
- accessibility;
- cycling facilities and ease of movement;
- public transport infrastructure and facilities;
- parking offer; and
- signage and ease of navigation.

Community

- attitudes, perceptions and aspirations.

St Baldred's Craule

Tyne Mouth



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