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Our ref: GL2/AB/L003

Scottish Borders Council
Council Headquarters
Newtown St. Boswells
Melrose
TD6 0SA

3rd March 2014

Dear Sirs

Scottish Borders Council: Proposed Local Development Plan 2013
Response made on behalf of The Co-operative Group

The following submission is made on behalf of the Co-operative Group in response to the Scottish Borders Council Proposed Local Development Plan (LDP). As you may be aware, the Co-operative Group has extensive business interests in the Council area, including foodstores, funeral care and travel businesses.

In total the Co-op employ over 340 people in Scottish Borders and play a significant role in the community by supporting local charities and good causes through their Community Fund.

The Co-op has a planned programme of investment for the Scottish Borders and is committed to bringing forward a series of new opportunities throughout the Council area. In light of this, the Proposed Local Development Plan is of particular interest to our client and our client's comments on the emerging LDP are set out below.

Policy ED3: Town Centres and Shopping Development

Firstly, we have reviewed the proposed LDP's policy in respect of retail development (Policy ED3) which primarily relates to the defined district town centres of Duns, Eyemouth, Galashiels, Hawick, Jedburgh, Kelso, Melrose, Peebles and Selkirk.

Having reviewed the policy, we note that it does not give any coverage to retail proposals outwith the defined district town centres, particularly in respect of proposals in the many important rural communities throughout the Borders.

In light of this, we consider that proposed Policy ED3 would benefit from being amended to acknowledge the role which small retail stores play in serving rural communities, particularly in helping to reducing the need to travel and creating local employment opportunities.

Such a policy approach has been successful elsewhere in Scotland. For example, in Argyll and Bute, which like the Borders is a predominantly rural area with many small villages and towns, Policy LDP 7 of their proposed LDP states the following:

"Small shops intended to serve the day to day needs of local communities, as well as those associated with recognised tourist facilities, farm shops and factory shops, will be exempt from the requirement to adopt a sequential approach, but may when required by the planning authority, be required to provide evidence that they will not have an adverse effect on the vitality and viability of existing town centres"

This policy is also supported by supplementary planning guidance which gives more detailed consideration to retail development in 'Key Rural Settlements, Villages and Minor Settlements' and offers support to retail proposals up to 1,000 sqm (gross), provided such proposals take account of the principles of the sequential approach, are well served by public transport and are consistent with other policies in the plan.

We consider that policy ED3 of the proposed Scottish Borders LDP would benefit from taking a similar approach to that set out above by acknowledging the importance that small stores play in serving rural communities and offering support to proposals which are designed to serve rural communities, provided they meet relevant criteria in terms of scale and accessibility.

Such a revision to policy ED3 would increase its relevance to the Scottish Borders as the proposed LDP is currently silent on proposals for retail development outwith the 9 district centres. Such a revision would also assist with enabling more people to shop locally instead of having to travel elsewhere, supporting the proposed plan's sustainability objectives.

Duns (Site Ref: Land south of Earlsmeadow/ ADUNS023)

Turning to site specific matters, the Co-operative Group is committed to bringing forward proposals for a new retail foodstore on land at Langtongate, Duns. The land at Langtongate is identified on the site plan that accompanies this submission.

The Co-op has identified the land at Langtongate as being the most suitable site in Duns to accommodate a new Co-op convenience store and an application for a new store is to be submitted to the Scottish Borders Council imminently.

The land at Langtongate forms part of a wider allocation in the proposed LDP which is allocated for residential development (Site Ref: ADUNS023). The proposed LDP proposes that site ADUNS023 should be developed for 60 new homes and establishes a list of site requirements, including a requirement that access into the site is taken from the A6105. The proposed plan also identifies that the site is to be the series of various investigations, including ground conditions and flood risk.

The Co-operative Group has an agreement with the landowner of the land at Langtongate to develop a new retail foodstore at this location and it is important to note that the landowner has not promoted the land at Langtongate for residential development. Indeed, it appears that site ADUNS023 is being unilaterally promoted for residential development by the Council.

The proposed LDP advises that site ADUNS023 extends to 4.4ha and has capacity to deliver 60 residential units over the forthcoming plan period. The Co-op require approximately 0.858 ha of this site to develop a new 1115 square metre (gross) store, together with associated car parking, and this would leave a balance of 3.54ha for a residential development.

Assuming a density of around 23 residential units per hectare, which is being achieved on other local sites, a 3.54ha site would have capacity to accommodate over 80 residential units, significantly exceeding the proposed LDPS's expectations.

In light of this, it is evident that the ADUNS023 site has more than enough capacity to accommodate a proposed foodstore and 60 residential units. Consequently, the Co-op proposals for Langtongate would not prejudice draft allocation ADUNS023and would still allow it to be developed for residential development in accordance with the indicative LDP capacity.

Not only would our clients proposals allow for the site to be developed in accordance with the indicative 60 unit capacity, they would actually improve the prospects of the site coming forward by delivering an access into the site from the A6105. Indeed, without our client delivering an access into the site, it is unlikely that the wider development ADUNS023 could be achieved.

Furthermore, our client's proposals would bring significant additional benefits to Duns in terms of retaining expenditure within the local area, reducing the need for residents to travel and the creation of new local employment opportunities.

In terms of there being support for retail development on the land at Langtongate, our client has an immediate requirement for improved store in Duns. Our client's existing store at Newtown Street in Duns extends to 385 sqm (net sales) and suffers from a variety of problems which compromise the satisfaction of the customers and the efficient operation of the store, including the following:

- Aisles are too narrow resulting in congestion within the store;
- The entrance foyer to the store is constricted and does not allow for the full range of customer services to be provided.
- Checkout provision is insufficient, resulting in frequent and persistent queues;
- Congestion within the store makes it difficult to manoeuvre stock trolleys and cages through aisles and shelves to replenish stock.
- The need for stock replenishment during busy times is, in itself, inconvenient for customers as cages take up valuable circulation space;
- There is insufficient floorspace to display a sufficient quantity of some goods and insufficient floorspace to offer customers the desired range of goods;
- The size and configuration of the storage area is currently inadequate, creating a compromised working environment for warehouse staff; and
- Lack of storage space results in increased need for more frequent deliveries which is both environmentally damaging and inefficient from an operational perspective.

These deficiencies cannot be resolved through the reorganisation of the store's internal layout and the above deficiencies have given rise to a series of operational difficulties, resulting in the Council having to pursue enforcement proceedings due to the storage of materials outwith the store.

Today, customers expect convenience stores to provide an attractive and spacious shopping environment allowing them to undertake their shopping trip efficiently and in relative comfort. The existing Co-op store does not allow for this and consequently there is significant expenditure leakage from Duns to more distant town and centres.

This submission is supported by a retail study which gives specific consideration to Duns and confirms that there is significant expenditure leakage from Duns, particularly to Berwick upon Tweed where there are a series of large supermarkets and proposals for further floorspace. The study also demonstrates how a modestly sized store at Langtongate could be accommodated without causing harm to Duns town centre and how the retention of retail expenditure within Duns would actually benefit the town.

There is a clear requirement for additional retail floorspace in Duns and the Co-operative Group is keen to meet customer expectations and demands. These demands are increasing as Duns is an expanding settlement and unless measures are taken to improve the retail offer in the town, expenditure will continue to leak from the Duns catchment to the detriment of the town.

As noted above, the Co-op has identified the land at Langtongate as being the best opportunity to deliver a new store in Duns. However, the Co-op has held discussions with officers from Scottish

Borders Council about their proposals and the Council did suggest a number of alternative relocation options, including extending the existing Co-op store.

It should be noted that redeveloping their existing Newton Street site would be the Co-op's preferred option as if achievable, this could represent the most straightforward and cost effective way of improving upon their existing retail offer. However, the existing site and operational constraints prevent any such extension or redevelopment and the Co-op have taken an informed decision to relocate in Duns.

The existing Co-op site extends to 0.24 ha and a new store would require a site of at least 0.64ha. Clearly, the existing Co-op site is not capable of accommodating the proposed development and an extension of the existing store would not deliver a significant uplift in floorspace and any uplift that could be achieved would result in a very significant reduction in the number of available parking spaces.

The enclosed retail study gives extensive consideration to other alternative sites in Duns and from this review, it is apparent that there are no suitable or available sites which can accommodate our client's proposed development in or on the edge of Duns town centre, even when allowing for flexibility.

Amending the proposed LDP allocation at Langtongate to allow for food retail store alongside a residential development would address the aim of allowing more people to shop in Duns. This is consistent with the LDP background retail paper which advises that there would be clear benefits in achieving improvements to retail provision across all the main towns within the Scottish Borders, not least by enabling more people to shop locally instead of having to travel elsewhere.

Amending the Langtongate allocation would also allow for the delivery of a modern convenience store, acting as a stimulus for development on adjacent sites, helping to facilitate wider connectivity between land uses, supporting sustainable transport patterns and creating local employment opportunities.

Taking the above matters into account, we consider that proposed allocation ADUNS023 should be amended to allow for a proposed retail and residential development on the land at Langtongate.

I trust that the above comments are of assistance and will be taken into account by the Council when advancing the emerging LDP. It would also be appreciated if you could provide written confirmation upon receipt of this submission.

Yours sincerely

[redacted]

Graeme Laing
Planning Director

[redacted]

Enc.

GL Hearn

Retail Study

In respect of proposed retail development at
Newtown Street, Duns

on behalf of

The Co-operative Group

February 2014

Prepared by

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Quality Standards Control

The signatories below verify that this document has been prepared in accordance with our quality control requirements. These procedures do not affect the content and views expressed by the originator.

This document must only be treated as a draft unless it is has been signed by the Originators and approved by a Business or Associate Director.

DATE	ORIGINATORS	APPROVED
February 2014	Graeme Laing Planning Director [redacted]	David Campbell Planning Director [redacted]

Limitations

This document has been prepared for the stated objective and should not be used for any other purpose without the prior written authority of GL Hearn; we accept no responsibility or liability for the consequences of this document being used for a purpose other than for which it was commissioned.

1.0 INTRODUCTION

1.1 This retail study has been prepared on behalf of the Co-operative Group in support of a proposed retail development on land at Langtongate, Duns that is currently being promoted through the emerging Scottish Borders Local Development Plan.

1.2 This study has been prepared to consider the retail effects of the proposals having regard to the relevant development plan policies and the requirements of Scottish Planning Policy. The report takes the following form:

- Section 2: outlines the proposed development;
- Section 3: outlines the relevant retail planning policy considerations;
- Section 4: outlines the shopping patterns of catchment area residents and examines the existing retail context;
- Section 5: assesses sequential site considerations;
- Section 6: assesses the retail impact of the retail proposals;
- Section 7: provides the conclusions to this retail assessment.

1.3 This report should be considered alongside our client's response to the Proposed Local Development Plan.

2.0 THE DEVELOPMENT PROPOSAL AND CONTEXT

Site Location and Description

2.1 The proposal site, as identified at Appendix 1, extends to approximately 0.9ha hectares and comprises an area of existing open ground.

2.2 The site is bound to the north by Langtongate (A6105), beyond which is the site of the former Berwickshire High School and the western boundary is formed by the recently built Berwickshire High School. The southern boundary is formed by an area of open ground while the eastern boundary is formed by an existing residential property, a vehicle storage yard and an area of open ground.

2.3 There is an existing access into the site from Langtongate (A6105) and in terms of topography; the site gently slopes from north to south. The site is located in an area where there are a range of activities taking place and which has become the focus for new development in Duns, through the recent development of Berwickshire High School. To the north west of the site is the former Berwickshire High School building which is due to be partly occupied Duns Primary School, and Duns swimming pool which is the focus for sports and leisure activities in the town.

Proposal

2.4 At this juncture we wish to explain the rationale behind our clients proposal and the background to the Co-op's decision to relocate to a new site in Duns.

2.5 The existing Co-op store at Newtown Street extends to 385 sqm (net sales) and its scale, nature and characteristics no longer best serve the number of customers who shop at the store. The existing store suffers from a variety of problems which compromise the satisfaction of the customers and the efficient operation of the store, including the following:

- Aisles are too narrow resulting in congestion within the store;
- General congestion around the checkouts and aisles results in conflict between customers waiting to be served and those manoeuvring through these areas;
- The entrance foyer to the store is constricted and does not allow for the full range of customer services to be provided. Congestion also arises in this area;
- Checkout provision is insufficient, resulting in frequent and persistent queues;
- Congestion within the store makes it difficult to manoeuvre stock trolleys and cages through aisles and shelves to replenish stock. As a result shelves are stacked at higher levels than normally found in foodstores.
- The need for stock replenishment during busy times is, in itself, inconvenient

for customers as cages take up valuable circulation space;

- There is insufficient floorspace to display a sufficient quantity of some goods and insufficient floorspace to offer customers the desired range of goods;
- The size and configuration of the storage area is currently inadequate, creating a compromised working environment for warehouse staff; and
- Lack of storage space results in increased need for more frequent deliveries which is both environmentally damaging and inefficient from an operational perspective.

2.6 The existing Co-op store is exhibiting the above characteristics and these deficiencies cannot be resolved through the reorganisation of the store's internal layout. The deficiencies have given rise to a series of operational difficulties, resulting in the Council having to pursue enforcement proceedings due to the storage of materials outwith the store.

2.7 Today shoppers expect supermarkets to provide an attractive and spacious shopping environment allowing them to undertake their shopping trip efficiently and in relative comfort. The existing Co-op store does not allow for this and the Co-operative Group is keen to meet customer expectations and demands in Duns. The Co-operative Group are committed to making a significant investment to provide a new larger foodstore in Duns, improving upon the quality of the existing store and improving the overall retail offer in the town.

2.8 The proposed store at Langtongate would have a gross floor area of 1,115 square metres (sqm) within which there would be a net sales area of approximately 780 sqm. This would be a represent a significant improvement on the existing Co-op store and would allow the Co-op to retail a much fuller range of convenience items in Duns, providing shoppers with far greater range and choice of goods. In doing so, the proposed store would be better placed to meet the needs of shoppers in the Duns catchment and would offer the opportunity to meet their shopping requirements locally, rather than having to travel significant distances to other stores and centres.

3.0 RETAIL PLANNING POLICY CONSIDERATIONS

Development Plan

3.1 The development plan relevant to the application site comprises the SESplan Strategic Development Plan (2013) and the Consolidated Scottish Borders Local Plan (2011). The adopted Local Plan is in the process of being replaced with the Council having consulted on the LDP Main Issues Report and the Proposed Local Development Plan expected to be published in October 2013.

SESPLAN – The Strategic Development Plan for Edinburgh and South East Scotland (2013)

3.2 On 27th June 2013, the Scottish Ministers approved the above plan with modifications. The approved Strategic Development Plan (SDP) sets out the strategic planning policies for the Council area, for the period up to 2032.

3.3 The SDP identifies that Duns lies within the Eastern Borders Strategic Development Area where the SDP directs significant levels of new housing development. At paragraph 57 the SDP advises that Duns is an important employment and service centre and is the administrative centre for the Eastern Borders.

3.4 In terms of retailing, Table 1 of the SDP sets out a Network of Centres for the plan area with Edinburgh City Centre defined as a regional town centre and Livingston, Kirkcaldy, Dunfermline and Glenrothes established as strategic town centres. The SDP does not define other town centres or commercial centres and instead advises that these are to be identified within Local Development Plans.

3.5 Policy 3 of the SDP considers 'Town Centres and Retail' and establishes that Local Development Plans will:

- Identify town centres and commercial centres clearly defining their roles.
- Support and promote the network of centres as shown in Table 1 and identify measures necessary to protect these centres including setting out the criteria to be addressed when assessing development proposals; and
- Promote a sequential approach to site selection of locations for retail and commercial leisure proposals. Any exceptions identified through Local Development Plans should be fully justified.

Scottish Planning Policy (SPP)

3.6 Scottish Planning Policy gives specific consideration to town centres and retailing (paras 52-65) and establishes that town centres should be the focus for a mix of uses including retail, leisure, entertainment, recreation, cultural and community facilities, as well as homes and businesses. SPP establishes that the sequential approach should be used when selecting locations for all retail and commercial leisure unless the development plan identifies an exception. The sequential approach requires that locations are considered in the following order:

- Town centre,
- Edge of town centre,
- Other commercial centres identified in the development plan,
- Out of centre locations that are or can be made accessible by a choice of transport modes.

3.7 SPP establishes that the sequential approach requires flexibility and realism from planning authorities, developers, owners and occupiers to ensure that different types of retail and commercial uses are developed in the most appropriate location. Where development proposals in out of centre locations are not consistent with the development plan, it is for the applicants to demonstrate that more central options have been thoroughly assessed and that the impact on existing centres is acceptable. SPP advises that out of centre locations should only be considered when:

- All town centre, edge of town centre and other commercial centre options have been assessed and discounted as unsuitable or unavailable,
- Development of the scale proposed is appropriate, and
- There will be no significant adverse effect on the vitality and viability of existing centres.

3.8 When a proposed retail or commercial leisure development is contrary to the development plan, planning authorities should ensure that:

- The sequential approach to site selection has been used
- There is no unacceptable individual or cumulative impact on the vitality and viability of the identified network of centres
- The proposal will help to meet qualitative and quantitative deficiencies identified in the development plan, and the proposal does not conflict with other significant objectives of the development

3.9 SPP advises that a retail impact analysis should be undertaken where a retail and leisure development over 2,500 square metres gross floorspace outwith a defined town centre is proposed which is not in accordance with the development plan. SPP advises that in carrying out an analysis, a broad based approach should be adopted and that it should not be necessary to attempt detailed calculations or forecasts of a sector's growth as small variations in assumptions can lead to a wide range of forecasts. Authorities and developers should where possible agree data and present information on areas of dispute in a succinct and comparable form.

Scottish Planning Policy Consultation Draft (2013)

3.10 The Scottish Government is in the process of revising Scottish Planning Policy and earlier this year consulted on the draft policy document. The Co-operative Group responded to this draft and it is anticipated that new SPP will be formally issued by the Government in 2014.

3.11 In terms of development management, the draft SPP broadly follows the existing SPP and requires that a sequential approach is used when selecting locations for all uses which generate significant footfall, including retail. The policy requires that locations are considered in the following order of preference:

- Town centre
- Edge of town centre
- Other commercial centres identified in the development plan; and
- Out of centre locations that are, or can be, made easily accessible by a choice of transport modes.

3.12 Paragraph 64 of draft SPP advises that planning authorities, developers, owners and occupiers should be flexible and realistic when applying the sequential approach to ensure that different uses are developed in the most appropriate locations. It goes on to advise that development should be at an appropriate scale to fit with existing centres and the aim is to encourage development which supports the viability and vitality of town centres.

3.13 Draft SPP advises that retail impact analysis is required for proposals over 2500 sqm gross floorspace although it may be required for smaller proposals and it is for planning authorities to advise when a retail impact analysis is necessary.

3.14 Paragraph 67 advises that where development proposals in out of centre locations are not consistent with the development plan, it is for applicants to demonstrate that more central options have been thoroughly assessed and that the impact on existing centres is acceptable. Planning authorities should consider the potential economic impact of development and take into account any possible displacement effect. It also establishes that out of centre locations should only be considered when:

- All town centre, edge of town centre and other commercial centre options have been assessed and discounted as unsuitable or unavailable.
- Development of the scale proposed is appropriate, and it has been shown that the proposal cannot reasonably be altered or reduced in scale to allow it to be accommodated at a sequentially preferable location; and
- There will be no significant adverse effect on the vitality and viability of existing centres.

Scottish Borders Local Development Plan Proposed Plan (October 2013)

3.15 Scottish Borders Council are in the process of replacing the adopted Local Plan and the emerging Local Development Plan is at an advanced stage of preparation, having recently having been the subject of a consultation exercise which the Co-operative Group responded to.

3.16 Policy ED3 'Town Centres and Shopping Development' establishes that the Council will seek to develop and enhance the role of town centres and that a network of centres and growth of the retail sector will be supported through directing development to the district town centres, including Duns.

3.17 The policy advises that to protect town centres, town centre locations will be preferred to edge of centre locations which in turn will be preferred to out of centre locations. An out of centre location will only be considered in exceptional circumstances and where there is no suitable site available in a town centre or edge of centre location.

3.18 In terms of out of centre retail development, the policy establishes that the Council will have regard to the following considerations in assessing any application:

a) The individual or cumulative impact of the proposed development on the vitality and viability of existing town centres.
b) The availability of a suitable town centre or edge of centre site,
c) The ability of the proposal to meet deficiencies in shopping provision which cannot be met in town centre or edge of centre locations,
d) The impact of the proposal on travel patterns and car usage,
e) The accessibility of the site by a choice of means of transport,
f) The location of the proposal. Sites will be located within existing settlements and within them preference will be given to applications on vacant and derelict sites, or on sites deemed surplus to requirements.

Scottish Borders Proposed Local Development Plan Retail Technical Note & Scottish Borders Council Retail Study 2011

3.19 In preparing their Proposed Local Development Plan the Council have issued a retail technical note which largely draws from the Council's 2011 retail study. Paragraph 3.5 of the technical note advises that there would be clear benefits in achieving improvements to retail provision across all the main towns within the Scottish Borders area, not least by enabling more people to shop locally instead of having to travel elsewhere.

3.20 In terms of the 2011 retail study, this subdivided the Council area into a series of 13 study zones. Study Zone 12 relates to Duns/Chirnside and within this area the study advises that 33.3% of convenience goods expenditure was retained locally.

3.21 The study (para 270) describes Duns as a traditional centre with a very low vacancy rate with most shops being independent, with the exception of the Co-op store. The study goes on to state that two thirds of convenience spending from Duns/Chirnside is exported, mostly to Berwick.

3.22 In terms of trading conditions, the study (paras 4.88-4.89) found that despite significant leakage, the turnover performance in Duns was good with an estimated surplus spend on all retail goods of around £2 million, indicating a popular centre enjoying robust trading conditions.

3.23 In terms of the scope for additional retail floorspace, the study (para 6.15) considers the Duns/Chirnside/Eyemouth area and found that sufficient expenditure capacity exists in the Chirnside area to support an approved new supermarket together with further improvements to convenience retail provision, for example by enlargement of existing facilities in Duns.

3.24 The Chirnside supermarket referred to by the study was approved at appeal on 5th November 2008 (Ref: P/PPA/140/372) and granted outline planning permission for a Class 1 retail store on the former Lloyds Tractors site at Berwick Road, Chirnside. We understand that since the Council study was published, this permission has lapsed and the anticipated improvements in the convenience retail offer within the Duns/Chirnside catchment have not come forward.

3.25 Table 53 of the retail study considers the capacity for additional floorspace within Duns/Chirnside and it concluded that there was a surplus of £1.75m in 2011. However, as the aforementioned consent in Chirnside has lapsed, the £1.95m of expenditure associated with this permission has been released, increasing the surplus estimated by the 2011 study to £3.7m.

3.26 The Council's retail study took the clear view that there was scope to improve convenience retailing in Duns with the Chirnside consent in place. Now that the Chirnside consent has lapsed, there is a more pressing need to improve upon the convenience retail offer within the Duns catchment.

4.0 RETAIL CONTEXT

4.1 In this section we review the existing retail provision and existing shopping patterns in the catchment area. The study area is illustrated at Appendix 2 and corresponds with the Duns/Chirnside study zone as defined in the Scottish Borders Retail Study 2011.

4.2 In order to understand existing shopping patterns in the study area and to provide an empirical base to our research, this study has been informed by a household telephone survey which establishes where people in the study area shop for food. The results of this household survey are provided at Appendix 3.

4.3 A 251 respondent household shopper survey was undertaken in October 2013 by NEMS Market Research. This survey interviewed respondents residing in the study area and sought to identify their shopping habits, incorporating a series of questions relating to convenience shopping patterns, the stores and outlets used by local residents; the frequency of shopping trips; expenditure levels; modes of transport; and whether shopping trips were combined with other activities.

Duns

4.4 The adopted Local Plan defines a town centre boundary for Duns town centre and this is focussed around Market Square, Murray Street, Easter Street, Golden Square and their immediate surrounds.

4.5 Duns town centre is a traditional market town and retail provision is relatively modest with the majority of the retail premises provided in the ground floor of traditional properties. As such, the majority of the retail units in Duns town centre have limited floorplates with little scope for expansion.

4.6 The retail composition of the town centre reflects Duns role as an important tourism centre with the town centre being home to a number of gift shops, cafés and hotels.

Co-op, Newtown Street, Duns

4.7 Convenience retailing in the town centre is very much focussed within the existing Co-op foodstore on Newtown Street which extends to 385 sqm (sales) and provides a limited range of convenience goods.

4.8 The shopper survey results indicate that 15.1% of shoppers in the Duns catchment normally use the Co-op store for their main food shopping. However, the survey results indicate that the Co-op store at Newtown Street performs more of a top up shopping role, with 56.8% of respondents indicating that this is the store they normally use for top up shopping purchases. This far higher usage of the Co-op store for top up shopping suggests that many of the catchment population choose not to use the Co-op store for main food shopping purchases as it does not provide sufficient range and choice to meet their main food shopping needs.

4.9 In addition to the existing Co-op store, the town centre's convenience offer is supplemented by a Costcutter store, a bakery, a butchers and a fishmonger. In terms of non-food retailing, this is mainly targeted at the tourism market and the town centre is home to a number of gift shops and other non-food retailers, including a Home Hardware store.

4.10 The shopper survey posed a series of questions with regard to Duns town centre and from the results it can be seen that shoppers largely choose not to shop in Duns town centre due to the lack of choice and range of shops (44.5%) with many of the respondents (32%) indicating that they find Duns town centre too expensive.

Chirnside

4.11 The village of Chirnside lies approximately 6.5 miles to the north east of Duns and convenience shopping in the village is currently concentrated in the small Co-op store (138m^2 net) on Main Street. This small store provides a very limited range of convenience goods and predominately caters for people's basic day to day and top-up convenience shopping needs. Overall, the facilities offered in Chirnside act as useful top-up shopping destinations that are well used by the local population and also serve visitors to the area.

Berwick upon Tweed

4.12 Outwith the catchment area, the focus for convenience shopping provision is in Berwick upon Tweed which lies approximately 16 miles east of Duns. Berwick upon Tweed has an expansive convenience retail offer with Morrisons, Tesco, Aldi, Farmfoods and Marks & Spencer all represented in the town. The focus for convenience retailing in Berwick upon Tweed is in the large Morrisons and Tesco stores which are given further coverage below.

Morrisons, North Road, Berwick Upon Tweed

4.13 This large out of centre Morrisons store (1,634 sqm net) retails a large selection of convenience items together with a range of non-food goods. The store also has an instore café, large surface level car park, car wash, petrol filling station and it trades 8am-9pm Monday to Saturday and 10am-4pm on Sunday. In terms of its offer, the store has an extensive range of convenience goods and benefits from having an instore butcher, bakery, delicatessen and fresh fish counter. The store also retails a significant selection of electrical, homeware, home entertainment and clothing items.

4.14 At the time of survey the store was busy and most customers were undertaking bulk food shopping trips. The attractiveness of this store was evident at the time of our survey, when the car park was busy, the aisles were congested and there were queues at the checkouts. These characteristics confirm that this Morrisons store is overtrading and is drawing large amounts of trade from a wide area, something that is confirmed by the Northumberland County Council Retail Study (2013). This large

Morrisons foodstore attracts a significant amount of trade from the Duns catchment area, with 30% of respondents undertaking their main food shopping at the store.

4.15 These results illustrate the degree to which the existing Morrisons is over trading, something which is not unexpected given the size of the store, its offer and proximity to the Duns catchment. It is also noted that the Morrisons store has an extant permission for a 1068 sqm store extension and additional car parking, something that will draw further trade from the Duns catchment, reinforcing its already dominant trading position.

Tesco, Ord Drive, Berwick upon Tweed

4.16 Situated at Ord Road on the Tweedside Trading Estate, this large out of centre Tesco store (1,542 sqm net) retails a large selection of convenience items with the store including a butchery, fresh fish counter and an instore bakery. This Tesco store also retails a broad range of non-food items, including clothing and electrical items. The store also has a large surface level car park and petrol filling station.

4.17 The Tesco store trades 6am–midnight Monday to Saturday and 10am–4pm on Sunday. At the time of survey the store was busy and most customers were undertaking bulk food shopping trips. This large foodstore attracts a significant amount of trade from the Duns catchment, with 16% of respondents from the catchment advising that they normally undertake their main food shopping at this store.

Shopping Patterns

4.18 The survey data indicates that 87.10% of the Duns/Chirnside population undertake their main food shopping at stores outwith the Duns catchment. The most popular stores are the large Tesco and Morrisons stores in Berwick upon Tweed which involve shoppers making round trips of more than 30 miles to shop at these stores. Stores in Duns/Chirnside capture a far greater proportion of top up shopping trade with 74.8% of shoppers undertaking top up shopping purchases at local stores. Indeed, it is evident from the survey results that it is top up shopping trade which is largely supporting the existing convenience stores in Duns/Chirnside.

4.19 Our analysis, which is based on the NEMS 2013 shopper survey, reveals that the Duns catchment retains £5.78m of the £19.93m convenience expenditure that it generates. With only 29% of convenience trade being retained in the Duns catchment, it is evident that trade leakage from Duns has continued to increase since the Council's 2011 retail study.

4.20 The survey also reveals that shoppers are leaving the Duns catchment appear due to the lack of choice and range of shops in Duns and also due to stores in Duns being considered expensive.

4.21 The survey also examined whether shoppers link their main food shopping trips with other activities and 50.8% of respondents indicated that they do not link their main food shopping trip with other activities. Of those who do undertake linked trips

(47.5%), their main food shopping trip is linked with non-food shopping (10.5%), travelling to and from work (8.4%) and visits to café's/restaurants (6.7%).

4.22 With more than half of the respondents advising that they do not link their main food shopping trip with other activities, this supports the view that most shoppers are not using Duns largely due to its constrained retail offer. This supports our view that if a new convenience store were provided in Duns it would help to retain a far greater proportion of convenience goods expenditure in the town.

4.23 In terms of travel mode, the shopper survey confirms the extent to which the catchment population rely on the car for their main food shopping trip with 89.9% of respondents normally using a car for their main food shopping trip. This result reflects the fact that large numbers of shoppers are travelling to stores outwith the catchment and due to the rural nature of the catchment cars are relied upon for day to day travelling needs.

Overview

4.24 It is evident that the existing Co-op store in Duns is the only main food shopping destination within the defined catchment although it only captures a very small proportion of main food shopping trade. The remaining retail provision within the Duns catchment is extremely limited and from the results of the shopper survey it is evident that these stores are primarily being used for top-up shopping.

4.25 The absence of a modern and appropriately sized foodstore in Duns is resulting in a significant number of shoppers travelling to the existing large foodstores outwith the catchment area and our research indicates that 71% (£14.15m) of expenditure is leaking from the Duns/Chirnside area.

4.26 The shopper survey reveals that shoppers are leaving Duns/Chirnside because the current retail offer is too limited and the large format superstores in other locations, particularly Berwick upon Tweed, provide shoppers with far greater range and choice.

4.27 With such significant expenditure leakage, there is a clear need to improve upon the retail offer in Duns, particularly given the proposed expansion of Duns and the important administrative function of the town. The provision of a larger Co-op store in Duns would provide shoppers in Duns/Chirnside with far greater range and choice, allowing the Co-op to introduce new lines, including their value range, which would address some of the issues expressed by shoppers in the survey.

4.28 A store of the scale proposed would be commensurate with Duns position within the settlement hierarchy and one which would not threaten the town centre but strengthen the town's retail offer. The proposal would help to retain a far greater proportion of shoppers within Duns, reducing the number of shoppers travelling longer distances to the large foodstores located outwith the catchment and clawing back expenditure to the town.

5.0 SEQUENTIAL APPROACH

5.1 This chapter assesses considers the sequential approach to site selection as set out in Scottish Planning Policy and the adopted Local Plan.

Planning Policy Context

5.2 SPP establishes that the sequential approach requires sites to be considered in the following order:

- Town centre,
- Edge of town centre,
- Other commercial centres identified in the development plan,
- Out of centre locations that are or can be made accessible by a choice of transport modes.

5.3 SPP establishes that the sequential approach requires flexibility and realism from planning authorities, developers, owners and occupiers to ensure that different types of retail and commercial uses are developed in the most appropriate location. Where development proposals in out of centre locations are not consistent with the development plan, it is for the applicants to demonstrate that more central options have been thoroughly assessed and that the impact on existing centres is acceptable. SPP advises that out of centre locations should only be considered when:

- All town centre, edge of town centre and other commercial centre options have been assessed and discounted as unsuitable or unavailable,

Application of the Sequential Approach

5.4 Therefore, in applying the sequential approach, the tests to be applied is whether more central sites are **suitable or available**.

5.5 In terms of suitability, regard should be had to the Supreme Court's Judgement of 21st March 2012 in the case of *Tesco Stores Ltd v Dundee City Council (2012) UKSC13*. In considering the assessment of a site's suitability for retail development. the Judgement made by Lord Hope commented as follows:

- *"To refuse an out of centre planning consent on the ground that an admittedly smaller site is available within the town centre may take an entirely inappropriate business decision on behalf of the developer" (paragraph 28)*

- *"The question remains whether an alternative site is suitable for the proposed development not whether the proposed development can be* *altered or reduced so that it can be made to fit an alternative site." (paragraph 29)*

- *"It is the proposal for which the developer seeks permission that has to be considered when the question is asked whether no suitable site is available within or on the edge of the town centre" (paragraph 37)*

- *"the issue of suitability is directed at the developer's proposals, not some alternative scheme which might be suggested....these criteria are designed for use in the real world in which developers wish to operate, not some artificial world in which they have no interest doing so." (paragraph 38)*

5.6 The Supreme Court's decision sets out the legally correct approach to the sequential test, meaning that retail proposals should be viewed in the "real world" and the suitability of sequentially preferable locations must be considered in relation to whether it is "*suitable for the development proposed by the applicant*" and not with a view to resolving retail deficiencies within sequentially preferable locations.

5.7 This sets the context for the consideration of potential sequentially preferable sites in Duns. What we are seeking to determine, is if there are any sites within or on the edge of the town centre that are capable of accommodating the proposed development, that being a 1115 sqm foodstore together with car parking.

5.8 In terms of flexibility, although it is acknowledged that all of the goods sold by the Co-op could be sold separately from developments located on smaller town centre sites, there would be no benefits gained by splitting the proposed store's offer because key elements are interdependent upon each other and vice versa. Indeed, such an operation in the context of this proposal would not serve the purpose of the proposed development, namely a foodstore of sufficient size and quality to enable shoppers to carry out efficient weekly food shopping trips without having to face the problems associated with an overtrading store or travelling to an alternative store outwith the catchment.

Area of Search

5.9 In light of the above, this assessment considers whether there are any suitable or available sites within or on the edge of Duns town centre, which could accommodate the proposed foodstore and its car parking.

5.10 In terms of suitability, the Co-op site at Langtongate extends to 0.9 ha however, if allowing for some flexibility, the very minimum site area that the proposed development could be accommodated on is 0.64 ha.

5.11 In considering potential sequentially preferable sites, Scottish Borders Council requested that a series of 8 alternative sites be considered and these sites are illustrated on the plan provided to us by the Council (Appendix 5). Each potential site suggested by the Council is considered below, having regard to their numbered references on the plan at Appendix 5.

Site 2: Duns Primary School, Langtongate, Duns

5.12 This site extends to 0.49ha and comprises the existing and operational Duns Primary School. The primary school site lies outwith the defined town centre boundary and although it is closer to the town centre than the application site, it is nevertheless out of centre. Scottish Planning Policy makes no distinction between out of centre sites and on this basis alone, the primary school site cannot be considered to represent a sequentially preferable alternative to the Langtongate site.

5.13 Scottish Borders Council published a draft development brief for the primary school site in April 2012, advising that the existing school has capacity issues and is expected to relocate to the former High School buildings. From discussions with the Council, we understand that the proposed school relocation could take place in 2014-2015, although there are no confirmed dates for this move.

5.14 While we understand that the relocation has funding in place, there is some uncertainty regarding the timescales of the primary school relocation, but the existing site is unlikely to become available for redevelopment before 2015. Our client has an immediate requirement for a new retail store and a site which may become available in 2015 is not considered to be suitable.

5.15 Even if the existing primary school site were to become available in the short term, the site only extends to 0.49ha and is too small to accommodate the proposed development, even when allowing for some flexibility.

5.16 Finally, the development brief for the primary school site sets out the main objectives and issues to be addressed as part of any future redevelopment. These include the following key objectives:

- Retention of the stone frontage of the existing primary school.
- Safeguarding the amenity of adjoining residential properties.
- Safeguarding the sensitive landscape setting of Duns Castle Designed Landscape.
- Protecting the setting of adjoining listed buildings and Duns Conservation Area.

5.17 Setting aside the fact that the primary school site is too small to accommodate the proposed development, even if were possible to develop a foodstore on the site, such proposals would not be able to meet the terms of the design brief. The development of the site for a foodstore would require the clearance of the existing school buildings and it would be extremely challenging to achieve the other aims of the development brief, particularly safeguarding the setting of Duns Castle Designed Landscape which lies directly opposite the site.

5.18 ***Verdict: Taking all of the above matters into account; it is apparent that the existing primary school site is not suitable for the proposed development and is therefore discounted as being sequentially preferable to the proposal site***

Site 3: Existing Co-op Store and Town Centre Car Park

5.19 In the first instance, it should be noted that redeveloping their existing site would be the Co-op's preferred option as, if achievable, this could represent the most straightforward and cost effective way of improving upon their existing retail offer. However, the existing site and operational constraints prevent any such extension or redevelopment and the Co-op took an informed decision to invest in relocating to the application site.

Lidl GmbH v The Scottish Ministers (first) and North Ayrshire Council (second) (2006) CSOH 165

5.20 Notwithstanding this point, we direct the Council to the Court of Session decision relative to an appeal by Lidl against the Scottish Ministers and North Ayrshire Council. This case centred around the sequential approach and its application where a retailer is seeking to relocate from an existing town centre store to an out of centre location. In this case Lord Glennie found:

> *'If the proposed new development is of a size and layout capable of being accommodated within the existing site, I see no reason why the existing site should not be taken into account as a possible available suitable site for the proposed development. But in practice that will, I suspect, seldom be the case.'*
>
> *'It is clear .... that the proposed development covers a significantly greater floor area than is available at the existing site .... Clearly therefore, as a matter of fact, the existing site cannot accommodate the proposed development.'*
>
> *'I am unable to see how, consistently with a correct legal interpretation of what is meant by "suitable sites" .... the Reporter could have concluded that the existing site was suitable for, or could accommodate, the proposed development. The proposed development is simply too big for the existing site.*

5.21 When considering Lord Glennie's comments relative to the Co-op proposals in Duns, it is important to compare the existing and proposed sites. The existing Co-op site extends to 0.24 ha and the proposals require a site of at least 0.64ha. Clearly, the existing Co-op site is not capable of accommodating the proposed development.

5.22 Furthermore, an extension of the existing store would not deliver a significant uplift in floorspace and any uplift that could be achieved would result in a very significant reduction in the number of available parking spaces.

5.23 Although it is acknowledged that reduction in parking standards can be considered, the existing Co-op store car park is already heavily subscribed and the increased car parking provision that will be achieved at Langtongate is one of the qualitative benefits of the proposal. Indeed, any reduction in car parking provision at the existing site would only serve to create and/or exacerbate the existing internal and external issues of congestion and traffic safety, to the detriment of Co-op customers and Duns town centre.

5.24 Other considerations with regards to the existing Co-op site concern trading practicalities and commercial realities. Even if a redevelopment were possible, it would be necessary to close the existing store and car park completely for 6-12 months. Not only is this commercially unacceptable for the Co-op but it would also leave Duns without a main food shopping facility or a town centre car park for a considerable period with all the consequent impacts in terms of jobs, travel patterns and associated costs and such like.

5.25 Extending the existing store is similarly impractical with difficulties in being able to maintain servicing and other necessary back-of-house arrangements. There would also be impacts on the ability to trade the full extent of floorspace as well as conflicts between construction work, traffic and customers.

5.26 ***Verdict: Taking all of the above matters into account; it is apparent that the existing Co-op site is not suitable for the proposed development and is therefore discounted as being sequentially preferable to the proposal site***

Site 4: J Aitchison Car Repairs and Petrol Filling Station

5.27 This site is located at the junction of Currie Street and Bridgend, in the south eastern corner of Duns town centre and is currently trading as a car repairs garage and petrol filling station. The site comprises two existing trading business and is not currently being marketed for sale.

5.28 The site extends to 0.25ha and is only marginally bigger than the existing Co-op site which extends to 0.24ha. This site is considerably smaller than the size of site that would be required in order to accommodate our client's proposals.

5.29 Clearly, this site is not suitable for the proposed development. In addition, as an existing petrol filling station and car garage, the site is likely to be contaminated and the costs associated with redeveloping this site for alternative uses are likely to be significant, impacting upon redevelopment viability.

5.30 ***Verdict: This site is neither available nor suitable for the proposed development and is therefore discounted as being sequentially preferable to the proposal site.***

Site 5: Existing Police Station and Council Offices, Newtown Street, Duns

5.31 This site comprises the existing Duns Police Station together with Council offices at Newtown Street, Duns. The site is located within Duns town centre and the total site area is approximately 0.22ha.

5.32 This site is smaller than the existing Co-op site and therefore is unsuitable as it is incapable of accommodating a store that is bigger than our client's existing facility. In addition, this site is home to a series of operational uses, is not being marketed for sale, and its redevelopment would require the relocation of several existing uses, including the town's police station.

5.33 The site is also located within the Duns conservation area and the existing stone built properties make a positive contribution to the conservation area. Although redevelopment for our client's proposals is not feasible, any redevelopment would involve the loss of these existing buildings which make a positive contribution to Duns Conservation Area, something which the policies in the development plan would seek to resist.

5.34 ***Verdict: This site is not suitable for the proposed development and is therefore discounted as being sequentially preferable to the proposal site.***

Site 6: Hotel Stuart, Baillie's Entry, Duns

5.35 Site 6 comprises the existing Hotel Stuart and its grounds. Hotel Stuart is an existing operational business and it is not currently on the market for sale. As such this site is not available.

5.36 The hotel and its grounds are located within Duns conservation area and make a positive contribution to the conservation area. The redevelopment of the site would involve the loss of this important building, something which the relevant planning policies would seek to resist.

5.37 Moreover, the hotel site extends to 0.31ha and has a very narrow frontage, making it completely incapable of accommodating a new foodstore building together with the required customer car parking.

5.38 Achieving a suitable site access into this site would also be challenging. The site is accessed from Baillie's Entry, which links the site with South Street at Market Square. Baillie's Entry is a relatively narrow shared surface road (i.e. there is no change in level between the carriageway and the adjoining footways) as illustrated in the photograph below. Although there is sufficient width between the adjoining buildings to allow two cars to pass, it is likely that at least one of them would have to cross into the footway area to do so.

Photograph of Baillie's Entry: note the relatively narrow carriageway width and the shared surface, with no change in level between the carriageway and the adjoining footways.

5.39 Intensifying the use of Baillie's Entry by customer vehicles to and from a proposed development would increase the frequency of vehicles using the footway to pass opposing direction vehicles. The number of pedestrians using Baillie's Entry would also increase and therefore conflicts between vehicles and pedestrians would arise more frequently, which would likely be of concern to the roads authority. An articulated service vehicle using Baillie's Entry would likely mean that no cars could pass it in the opposite direction, resulting in cars having to wait at the end of the narrow section to allow the articulated vehicle to pass.

5.40 Finally, there is not enough space within this site to accommodate the size of store envisaged by the Co-op with accompanying car parking and an unloading area for service vehicles. Any marked reduction from prevailing guidelines in car parking at the proposed development could lead to increased on-street parking on the surrounding roads, which would leave fewer spaces available for general public use.

5.41 ***Verdict: This site is neither available nor suitable for the proposed development and is therefore discounted as being sequentially preferable to the proposal site.***

Site 7: Duns Library, Offices and Club, New Road, Duns

5.42 This site comprises the existing Duns Library together with adjoining offices and a social club. The site is located within Duns town centre, extending to approximately 0.42ha.

5.43 This site is not suitable as it is incapable of accommodating a store bigger than our client's existing facility. In addition, this site is home to a series of existing operational uses, is not being marketed for sale and its redevelopment would require the loss of a number of existing buildings that make a positive contribution to Duns Conservation Area.

5.44 ***Verdict: This site is not suitable for the proposed development and is therefore discounted as being sequentially preferable to the proposal site.***

Site 8: Community Hall and Social Club, Langtongate, Duns

5.45 This site comprises the existing Duns Police Station together with Council offices at Newtown Street, Duns. The site is located within Duns town centre and the total site area is approximately 0.28ha.

5.46 This site is only marginally larger than the existing Co-op site and is therefore unsuitable on the basis that it is incapable of accommodating a store bigger than our client's existing facility. In addition, this site is home to a series of existing operational uses, is not being marketed for sale and its redevelopment would also require the loss of a number of existing buildings that make a positive contribution to Duns Conservation Area.

5.47 ***Verdict: This site is not suitable for the proposed development and is therefore discounted as being sequentially preferable to the proposal site.***

Site 9: Duns Museum, Council Offices and Fire Station, Newtown Street

5.48 This site comprises the existing Duns Museum, Council offices and Fire Station at Newtown Street, Duns which is located within Duns town centre and extends to approximately 0.36ha.

5.49 This site is incapable of accommodating a store that is bigger than our client's existing facility. In addition, this site is home to a series of existing operational uses, is not being marketed for sale and its redevelopment would also involve the loss of a number of existing buildings that make a positive contribution to Duns Conservation Area.

5.50 ***Verdict: This site is not suitable for the proposed development and is therefore discounted as being sequentially preferable to the proposal site.***

Conclusions

5.51 We have undertaken a comprehensive review of potential alternative sites in and on the edge of Duns town centre. From our review, it is apparent that there are no available or suitable sites which can accommodate our client's proposed development, even when allowing for flexibility.

5.52 Despite its out of centre location, the Langtongate site is the only available and viable site within the area which is capable of accommodating the proposed store and meeting the requirement for a new retail foodstore in Duns. The Langtongate site is located in an area where there is planned settlement expansion and is close enough to the town to generate spin off benefits.

5.53 The Langtongate site is in a location which forms an important gateway to Duns and the proposed development is easily accessible for those arriving by public transport, cycle and on foot. In this regard, the proposed store will also serve a significant walk in catchment area population.

6.0 RETAIL CAPACITY

6.1 Scottish Planning Policy establishes that retail impact analysis should be undertaken for proposals of 2,500 sqm gross floorspace and above. The Co-op proposals involve the development of 1,115 sqm of gross retail floorspace and fall well below the level at which impact requires any consideration. However, we have given some broad consideration to retail capacity and impact matters in the following sections.

Catchment Area

6.2 The catchment and shopping provision plan contained at Appendix 2 illustrates the catchment area of the proposed store. The catchment area follows the catchment area established by The Scottish Borders Council Retail Study (2011) for Duns and Chirnside.

Household Shopper Survey

6.3 As noted in previous sections of this report, in order to understand existing shopping patterns in the catchment and to provide an empirical base to the study, this report has been informed by a shopper survey and the results of this survey are provided at Appendix 3.

Design Year and Price Levels

6.4 It is anticipated that allowing for the time required to gain permission and to construct the proposals; the earliest that the proposed retail floorspace would be trading would be late 2014. Stable trading patterns are unlikely to be established until 2015 and this has therefore been used as the design year for the study. The position in 2016 has also been considered in order to examine the position in the longer term. All figures are expressed in 2012 prices.

Catchment Population

6.5 The population levels for the study area are set out in Table 1 of Appendix 4. Population data was sourced from the Scottish Borders Council Retail Study 2011.

Expenditure

6.6 The expenditure rate per capita for convenience goods within the study area has been provided by Experian (2012 prices). A deduction of 3.7% for special forms of trading was made in line with the results of the shopper survey and in terms of expenditure growth, the study follows the advice set out in Experian Retail Planner Briefing Note 9 (September 2012) which identifies a projected growth of 0.4% per annum for convenience goods, based on ultra-long projections. The ultra-long term projection rate is considered to be the most appropriate rate to use as it takes account of peaks and troughs of expenditure rates over the longest period available.

6.7 Table 3 multiplies the population in Table 1 with the expenditure per head data in Table 2, demonstrating that the resident catchment population will generate £20.37m of convenience goods expenditure in 2015.

6.8 These figures do not make any allowance for expenditure sourced from tourism spending in the catchment. The Scottish Borders is a well-established and popular tourist destination and tourist spending makes a significant contribution to the local economy. Therefore, our estimates of available expenditure are considered to be conservative.

Capacity for Additional Foodstore Provision

6.9 Table 8 (Appendix 4) identifies the existing convenience stores within the catchment area, setting out the turnover of these outlets. The convenience turnover of the existing stores has been calculated on a market share basis using information sourced from the shopper survey. Table 10 then compares the turnover of key stores with their company average benchmark levels and from this analysis it is evident that the Co-op at Newtown Street is currently overtrading as are the large foodstores in Berwick upon Tweed.

6.10 The estimated turnover of the existing convenience outlets drawn from the catchment area is £5.78m (2013) which is a fraction of the expenditure generated by the catchment.

6.11 When considering the turnover of the existing catchment floorspace against the expenditure generated by the catchment, it can be seen that there is a surplus of £14.15m in 2013 which is predicted to rise to £14.47m by 2015 and £14.62m in 2016 in the absence of any additional provision.

Qualitative Need

6.12 Within the Duns catchment area there is a paucity of modern convenience store provision with the existing Co-op store at Newtown Street serving a total estimated population of almost 9,000 people. The catchment area is dominated by small scale outlets which, although trading well, provide limited product ranges and cater for basic daily shopping needs. Consequently, there is a requirement to improve upon the existing shopping provision within the Duns area.

6.13 The effects of the qualitative deficiency in Duns are twofold. Firstly, residents in Duns who are seeking a modern foodstore facility have to travel to the large stores outwith the catchment area, involving trips of up to 30 miles for many shoppers. The existing shopper travel patterns therefore conflict with sustainability objectives and with Government policy of providing access to good quality shopping facilities locally.

6.14 It is estimated that the proposed store will 'claw back' trade (estimated at up to £14.15m) which is currently leaving the Duns catchment area to more distant stores and centres. The proposed development will improve upon the existing provision within the Duns area, thereby enhancing the vitality and viability of Duns town centre.

6.15 Secondly, since there are a limited number of foodstores serving the Duns catchment area, the existing Co-op store is exhibiting the traditional characteristics of overtrading at peak times, namely, in store congestion in the form of queues at tills and overly busy aisles as well as congestion in the car park.

6.16 The proposed store represents an opportunity to make a significant qualitative improvement to the existing shopping provision in Duns. The provision of the required larger store in Duns will mean that shoppers will have not have to travel to larger stores some distance away to meet their main food shopping needs.

Trade Diversion

6.17 Our estimate of the proposed store's turnover is set out in Table 9, Appendix 4. This is based upon benchmark sales which we have grown to allow for trading efficiency improvement in company average turnovers to 2016. The anticipated turnover of the proposed floorspace in 2015 is £5.57m.

6.18 Approximately £4.37m of the proposed store's trade would be drawn following the closure of the existing Co-op store on Newtown Street, leaving a balance of £1.2m which would largely be drawn from the £14.15m of convenience trade that is currently leaking from the Duns catchment.

6.19 A very minimal amount of trade would be drawn from the other small convenience stores located within the catchment area and the effect of the diversion on these stores will be to reduce levels of overtrading and the long term viability of the existing stores is not in question

6.20 Taking these matters into account, it can be seen that the proposed retail floorspace can be comfortably supported by the catchment without having unacceptable impacts on any defined centre in the catchment. In conclusion, we consider that the proposal will not lead to store closures or cause any demonstrable harm to the vitality and viability of existing centres.

6.21 Indeed, the Co-op proposals have the potential to improve upon the existing provision within the Duns area, enhancing the vitality and viability of Duns town centre. Whilst much would depend upon the degree to which both existing and potential new traders react positively to the new opportunities that the Co-op development would bring, the expenditure of extra customers who could be drawn to the centre would provide the potential for the health of the town centre to improve.

6.22 Due to the low number of convenience retailers in Duns many of the catchment population travel to the large stores outwith the catchment for their main food shopping. The proposed Co-op store therefore has the potential to bring trade back to the area. The proximity of the Co-op store to the town centre will provide a unique opportunity for spin-off expenditure to be generated to the benefit of shops and services within the centre.

6.23 This linked trip spending would both sustain and enhance the vitality and viability of the town centre. This could take the form both of additional trade for existing outlets and the impetus for new outlets to become established providing goods and services that would be complementary to those provided by the Co-op.

6.24 Overall, it is considered that the proposed development has the potential to make some improvements to the vitality and viability of Duns and may well encourage more shoppers to stay in the area and carry out linked trips with the other shops and services in the town centre.

7.0 CONCLUSIONS

7.1 There is an established requirement for additional retail floorspace in Duns and the Co-operative Group are now advancing proposals for the land at Langtongate which represent a valuable opportunity to make a significant qualitative improvement to the existing food shopping provision in Duns.

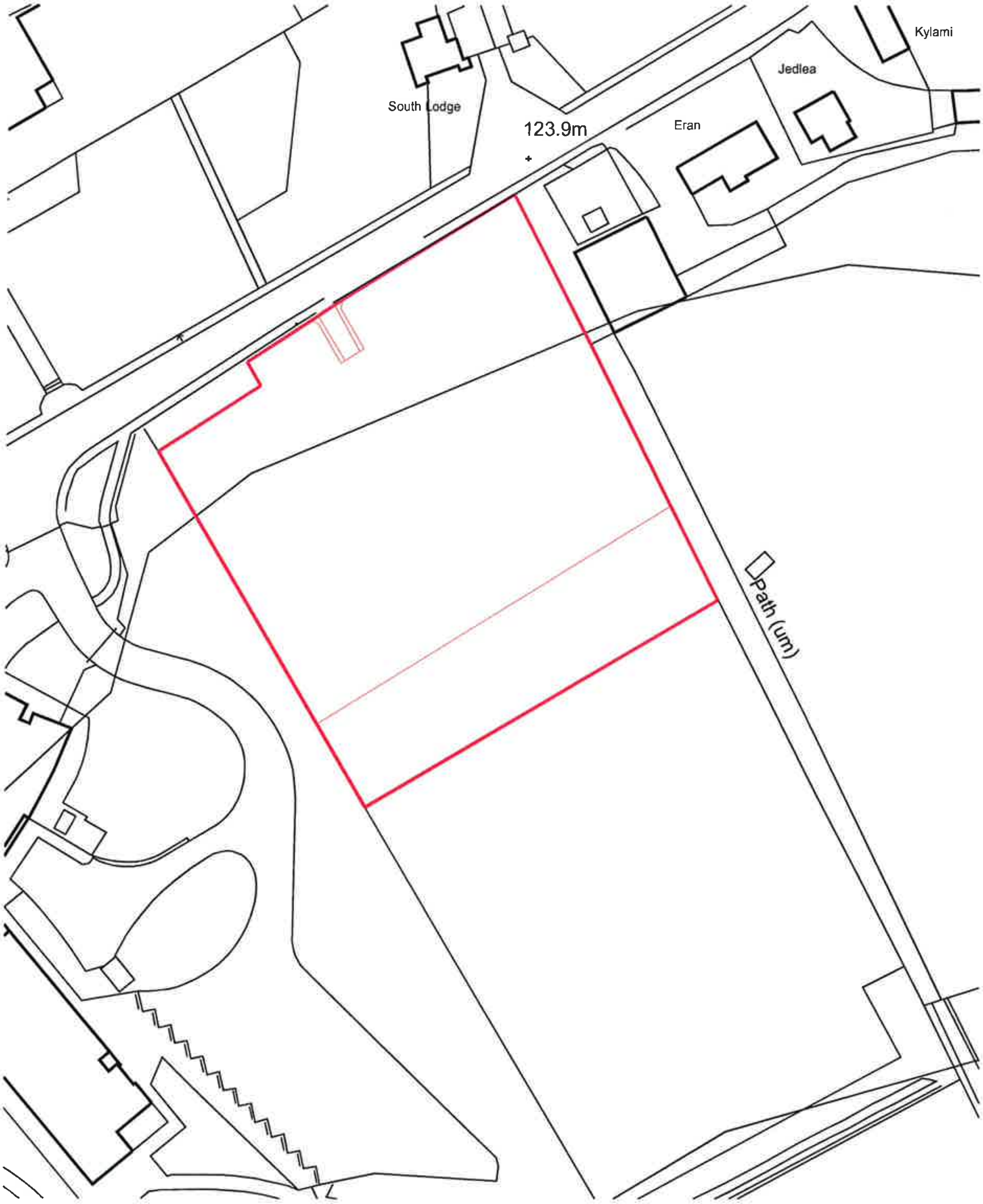
7.2 Scottish Planning Policy requires that a sequential approach be adopted for the selection of locations for retail development. Our review of Duns has revealed that there are no suitable and available sites in or on the edge of the town centre which are suitable for the proposed development. The Langtongate site is the only available, viable and commercially suitable site within the area that is capable of accommodating the proposed store and is accessible by sustainable modes of transport.

7.3 The retail study has shown that in addition to there being a surplus of convenience expenditure in the catchment area, the proposed store would also be supported by trade diverted from the closure of the existing Co-op store and would also claw back trade which is currently leaking from Duns to the existing large foodstores located outwith the catchment area.

7.4 The proposed store will not have any significant impact on any of the town centres in the surrounding area. In no case are store closures likely as a result of the proposed store and the delivery of a new foodstore in Duns will benefit shoppers. The retention of trade currently lost from Duns, and the attraction of new shoppers to the area, provides the potential for existing businesses in Duns town centre to benefit from spin-off expenditure.

7.5 The proposal complies with national, strategic and local planning policies for retail development. Having regard to the proposal's ability to deliver additional choice to Fortrose, the absence of any sequentially preferable sites and its compliance with planning policy, it is evident that the proposed store represents a valuable opportunity to meet the needs of Duns and is therefore commended to the Scottish Borders Council.

Appendix 1: Site Plan



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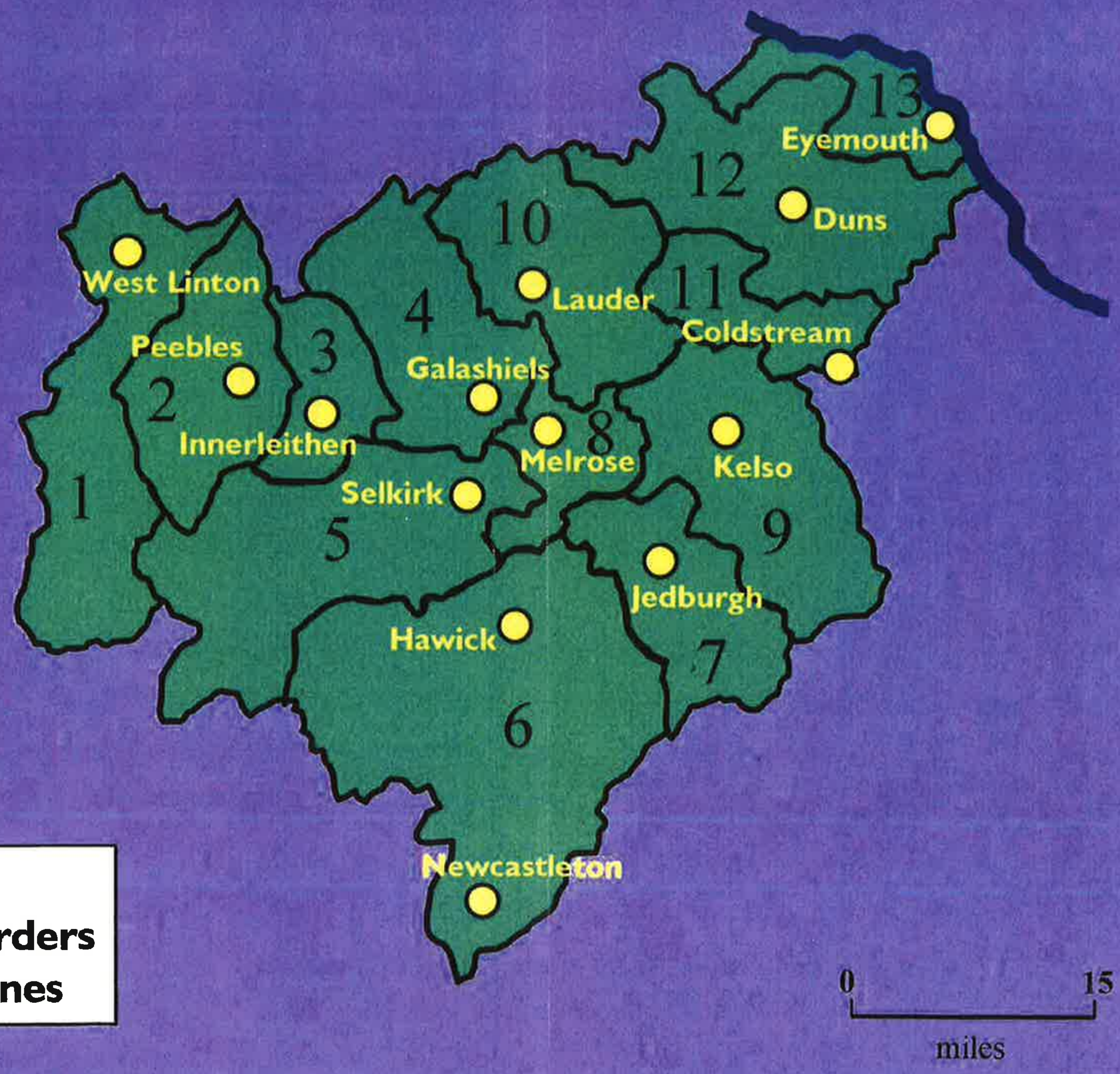
gala@camerons ltd uk
www camerons ltd uk
camerons

client:	Co-operative	project:	Proposed New Store Duns	title:	FEASIBILITY Location Plan
date:	Feb.14	drawn:	CP	scale:	1:1250 @ A4
number:	9105/2-02	rev:	-	file:	q:\acad\9105-new store, duns\9105-2-02.dwg

Appendix 2: Study Area Plan



Map 1
Scottish Borders
Survey Zones

Appendix 3: Shopper Survey Results

NEMS

NEMS market research
22-23 Manor Way
Belasis Hall Technology Park
Billingham
TS23 4HN
[redacted]
www.nemsmr.co.uk

Duns
Household Survey
for
GL Hearn

October 2013

Job Ref: 031013

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Introduction

1.1 Research Background & Objectives

To conduct a survey amongst residents in the Duns area to assess shopping habits for main food and grocery and top-up shopping.

1.2 Research Methodology

A total of 251 telephone interviews were conducted between Thursday 3rd October 2013 and Wednesday 9th October 2013. Interviews were conducted using NEMS in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day and in the evening. All respondents were the main shopper in the household, determined using a preliminary filter question.

1.3 Sampling

1.3.1 Survey Area

The survey area was all one zone, defined using postcode sectors. The zone details were:

Zone	**Postcode Sectors**	**Number of Interviews**
1	TD11, TD15	251
Total		**251**

1.3.2 Telephone Numbers

All available telephone numbers are used to obtain the sample of interviews. This includes published telephone numbers (land-lines and some mobile numbers) but is supplemented with ex-directory numbers as the demographic profile of this sub-set is different to the demographics of the published numbers sample. Ex-directory numbers are randomly generated using the published numbers as a 'seed'. Business numbers are de-duped and excluded.

We don't screen against the TPS (Telephone Preference Service) database, again because the demographic profile of TPS registered numbers is slightly different to the rest of the population. In addition, there is no legal requirement to screen against TPS registered numbers; market research is not classified as unsolicited sales and marketing.

1.3.3 Sample Profile

It should be noted that as per the survey's requirements, the profile of respondents is that of the main shopper / person responsible for most of the food shopping in the household. As such it will always differ from the demographic profile of all adults within the survey area. With any survey among the main shopper / person responsible for most of the food shopping in the household the profile is typically biased more towards females and older people. The age of the main shopper / person responsible for most of the food shopping in the household is becoming older due to the financial constraints on young people setting up home.

A number of measures are put in place to ensure the sample is representative of the profile of the person responsible for most of the food / shopping in the household.

First of all interviewing is normally spread over a relatively long period of time, certainly longer than the theoretical minimum time it would take. This allows us time to call back people who weren't in when we made the first phone call. If we only interview people who are at home the first time we call we over-represent people who stay at home the most; these people tend to be older / less economically active.

We also control the age profile of respondents; this is a two-stage process. First of all we look at the age profile of the survey area according to the latest Census figures. Using a by-product from additional data we collect from a weekly telephone survey of a representative sample of all adults across the country we know the age profile of the main-shopper in any given area. This information is from data based on in excess of 100,000 interviews and is regularly updated and is therefore probably the most accurate and up to date information of its kind.

Stratified random sampling helps ensure that the sample is as representative as possible. While the system dials the next random selected number for interviewers, all calls are made by interviewers; no automated call handling systems are used.

1.3.4 Time of Interviewing

Approximately two-thirds of all calls are made outside normal working hours.

1.3.5 Monitoring of Calls

At least 5% of telephone interviews are randomly and remotely monitored by Team Leaders to ensure the interviewing is conducted to the requisite standard. Both the dialogue and on-screen entries are monitored and evaluated. Interviewers are offered re-training should these standards not be met.

1.4 Weightings

To correct the small differences between the sample profile and population profile, the data was weighted. The population is of the main shopper in the household. Weightings have been applied to age bands based on an estimated age profile of main shoppers (see section 1.3.3 for details). The weighted totals differ occasionally from the adjusted population due to rounding error. Details of the age weightings are given in the table below:

Age	Main Shopper Profile (%)	Interviews Achieved	Age Weightings
18-24	5.26%	8	1.5988
25-34	17.90%	19	2.2890
35-44	20.47%	32	1.5543
45-54	18.35%	60	0.7432
55-64	15.01%	42	0.8686
65+	22.99%	82	0.6814
(Refused)	n/a	8	1.0000
Total		**251**	

1.5 Statistical Accuracy

As with any data collection where a sample is being drawn to represent a population, there is potentially a difference between the response from the sample and the true situation in the population as a whole. Many steps have been taken to help minimise this difference (e.g. random sample selection, questionnaire construction etc) but there is always potentially a difference between the sample and population – this is known as the standard error.

The standard error can be estimated using statistical calculations based on the sample size, the population size and the level of response measured (as you would expect you can potentially get a larger error in a 50% response than say a 10% response simply because of the magnitude of the numbers).

To help understand the significance of this error, it is normally expressed as a confidence interval for the results. Clearly to have 100% accuracy of the results would require you to sample the entire population. The usual confidence interval used is 95% - this means that you can be confident that in 19 out of 20 instances the actual population behaviour will be within the confidence interval range.

For example, if 50% of a sample of 251 answers "Yes" to a question, we can be 95% sure that between 43.8% and 56.2% of the population holds the same opinion (i.e. +/- 6.2%).

The following is a guide showing confidence intervals attached to various sample sizes from the study:

%ge Response	95% confidence Interval
10%	±3.7%
20%	±5.0%
30%	±5.7%
40%	±6.1%
50%	±6.2%

1.6 Data Tables

Tables are presented in question order with the question number analysed shown at the top of the table. Those questions where the respondent is prompted with a list of possible answers are indicated in the question text with a suffix of [PR].

The sample size for each question and corresponding column criteria is shown at the base of each table. A description of the criteria determining to whom the question applies is shown in italics directly below the question text; if there is no such text evident then the question base is the full study sample. If the tabulated data is weighted (indicated in the header of the tabulations), in addition to the sample base, the weighted base is also shown at the bottom of each table.

Unless indicated otherwise in the footer of the tabulations, all percentages are calculated down the column. Arithmetic rounding to whole numbers may mean that columns of percentages do not sum to exactly 100%. Zero percent denotes a percentage of less than 0.05%.

Percentages are calculated on the number of respondents and not the number of responses. This means that where more than one answer can be given to a question the sum of percentages may exceed 100%. All such multi-response questions are indicated in the tabulated by a suffix of [MR] on the question text.

Where appropriate to the question, means are shown at the bottom of response tables. These are calculated in one of two ways: if the data is captured to a coded response a weighted mean is calculated and the code weightings are shown as a prefix above the question text; if actual specific values were captured from respondents these individual numbers are used to calculate the mean.

Appendix 1:

Data Tabulations

By Gender & Age

Q01AWhere do you normally go to undertake your main food and grocery shopping?

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Aldi, North Road, Berwick-upon-Tweed	8.4%	21	12.3%	8	7.0%	13	0.0%	0	15.8%	3	0.0%	0	11.7%	7	9.5%	4	8.5%	7
Asda, Currie Road, Galashiels	4.8%	12	9.2%	6	3.2%	6	12.5%	1	5.3%	1	15.6%	5	5.0%	3	2.4%	1	1.2%	1
Asda, Main Street, Tweedmouth (Berwick)	2.8%	7	3.1%	2	2.7%	5	37.5%	3	15.8%	3	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Asda, The Jewel / Newcraighall, Edinburgh	0.8%	2	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	1	2.4%	1	0.0%	0
Co-op, Highcroft, Kelso	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Co-op, Newtown St, Duns	15.1%	38	10.8%	7	16.7%	31	0.0%	0	0.0%	0	9.4%	3	10.0%	6	7.1%	3	29.3%	24
Farmfoods, Berwick-upon-Tweed	2.8%	7	1.5%	1	3.2%	6	0.0%	0	0.0%	0	12.5%	4	1.7%	1	4.8%	2	0.0%	0
Lidl, Shedden Park Road, Kelso	0.8%	2	1.5%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Marks & Spencer, Berwick-upon-Tweed	2.8%	7	4.6%	3	2.2%	4	0.0%	0	0.0%	0	3.1%	1	1.7%	1	0.0%	0	4.9%	4
Morrisons, Moredun, Edinburgh	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Morrisons, North Road, Berwick-upon-Tweed	30.7%	77	32.3%	21	30.1%	56	37.5%	3	5.3%	1	25.0%	8	33.3%	20	38.1%	16	32.9%	27
Sainsbury's Local, High Street, Selkirk	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Tesco Extra, Paton Street, Galashiels	2.0%	5	0.0%	0	2.7%	5	0.0%	0	5.3%	1	3.1%	1	0.0%	0	7.1%	3	0.0%	0
Tesco, Berwick-upon-Tweed	15.9%	40	15.4%	10	16.1%	30	0.0%	0	31.6%	6	12.5%	4	18.3%	11	19.0%	8	12.2%	10
Tesco, Haddington, East Lothian	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Tesco, Hardengreen, Eskbank, Dalkeith, Midlothian	0.4%	1	0.0%	0	0.5%	1	0.0%	0	5.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco, North Berwick, East Lothian	1.2%	3	1.5%	1	1.1%	2	0.0%	0	0.0%	0	9.4%	3	0.0%	0	0.0%	0	0.0%	0
Internet / home delivery	4.0%	10	0.0%	0	5.4%	10	12.5%	1	5.3%	1	6.3%	2	6.7%	4	0.0%	0	1.2%	1
Aldi, Whittingehame Drive, Haddington	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Asda, Spott Road, Dunbar	1.6%	4	1.5%	1	1.6%	3	0.0%	0	10.5%	2	0.0%	0	1.7%	1	2.4%	1	0.0%	0
Co-op, Main Street, Chirnside	1.2%	3	3.1%	2	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	2.4%	2
Local shops, Berwick-upon-Tweed	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Sainsbury's, Pinnaclehill Industrial Estate, Kelso	2.0%	5	1.5%	1	2.2%	4	0.0%	0	0.0%	0	0.0%	0	3.3%	2	4.8%	2	1.2%	1
(Don't know / varies)	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0
Base:		251		65		186		8		19		32		60		42		82

Q01BAre there any other stores that you regularly use for your main food and grocery shopping? [MR]

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Aldi, King Street, Galashiels	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Aldi, North Road, Berwick-upon-Tweed	8.8%	22	7.7%	5	9.1%	17	12.5%	1	5.3%	1	15.6%	5	6.7%	4	11.9%	5	7.3%	6
Asda, Currie Road, Galashiels	2.8%	7	0.0%	0	3.8%	7	0.0%	0	5.3%	1	9.4%	3	3.3%	2	2.4%	1	0.0%	0
Asda, Main Street, Tweedmouth (Berwick)	9.6%	24	7.7%	5	10.2%	19	12.5%	1	5.3%	1	6.3%	2	6.7%	4	16.7%	7	9.8%	8
Asda, The Jewel / Newcraighall, Edinburgh	1.6%	4	0.0%	0	2.2%	4	12.5%	1	0.0%	0	0.0%	0	3.3%	2	2.4%	1	0.0%	0
Co-op, Newtown St, Duns	7.2%	18	7.7%	5	7.0%	13	0.0%	0	0.0%	0	6.3%	2	11.7%	7	7.1%	3	7.3%	6
Co-op, Old Town, Peebles	0.4%	1	0.0%	0	0.5%	1	12.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Costcutter, Murray St, Duns	2.8%	7	3.1%	2	2.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.5%	7
Farmfoods, Berwick-upon-Tweed	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Lidl, Shedden Park Road, Kelso	1.2%	3	1.5%	1	1.1%	2	0.0%	0	0.0%	0	6.3%	2	0.0%	0	0.0%	0	1.2%	1
Marks & Spencer, Berwick-upon-Tweed	2.8%	7	1.5%	1	3.2%	6	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	7.3%	6
Morrisons, North Road, Berwick-upon-Tweed	14.3%	36	18.5%	12	12.9%	24	12.5%	1	10.5%	2	15.6%	5	15.0%	9	11.9%	5	15.9%	13
Tesco Extra, Paton Street, Galashiels	2.4%	6	1.5%	1	2.7%	5	0.0%	0	5.3%	1	6.3%	2	3.3%	2	0.0%	0	1.2%	1
Tesco, Berwick-upon-Tweed	8.4%	21	4.6%	3	9.7%	18	25.0%	2	10.5%	2	9.4%	3	11.7%	7	7.1%	3	4.9%	4
Tesco, North Berwick, East Lothian	1.6%	4	3.1%	2	1.1%	2	12.5%	1	0.0%	0	3.1%	1	0.0%	0	0.0%	0	2.4%	2
Internet / home delivery	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Spott Road, Dunbar	1.6%	4	0.0%	0	2.2%	4	0.0%	0	0.0%	0	0.0%	0	1.7%	1	2.4%	1	2.4%	2
Co-op, Castle Gate, Berwick-upon-Tweed	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Co-op, Duns Road, Gifford	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Co-op, Main Street, Chirnside	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Local shops, Berwick-upon-Tweed	1.2%	3	3.1%	2	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	2.4%	2
Local shops, Duns	1.2%	3	1.5%	1	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	2.4%	2
Sainsbury's, Pinnaclehill Industrial Estate, Kelso	3.6%	9	0.0%	0	4.8%	9	0.0%	0	0.0%	0	3.1%	1	8.3%	5	2.4%	1	2.4%	2
Waitrose, Morningside Road, Edinburgh	0.8%	2	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	1	2.4%	1	0.0%	0
(No others)	40.2%	101	47.7%	31	37.6%	70	37.5%	3	57.9%	11	37.5%	12	40.0%	24	40.5%	17	35.4%	29
Base:		251		65		186		8		19		32		60		42		82

Q02 Which retailer do you purchase your main food internet / home delivery shopping from?
Those who shop online at Q01

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Asda	46.2%	6	0.0%	0	46.2%	6	0.0%	0	0.0%	0	100.0%	3	33.3%	1	33.3%	1	0.0%	0
Morrisons	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's	15.4%	2	0.0%	0	15.4%	2	100.0%	1	0.0%	0	0.0%	0	0.0%	0	33.3%	1	0.0%	0
Tesco	30.8%	4	0.0%	0	30.8%	4	0.0%	0	100.0%	1	0.0%	0	66.7%	2	0.0%	0	100.0%	1
Ocado	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	7.7%	1	0.0%	0	7.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	33.3%	1	0.0%	0
Base:		13		0		13		1		1		3		3		3		1

Q03 What is the main reason you choose (STORE MENTIONED AT Q01) to do your main food and grocery shopping?

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Accessibility by public transport	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Car parking prices	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Car parking provision	2.0%	5	4.6%	3	1.1%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	1	2.4%	1	3.7%	3
Choice of food goods available	13.9%	35	15.4%	10	13.4%	25	25.0%	2	5.3%	1	12.5%	4	15.0%	9	9.5%	4	18.3%	15
Choice of shops nearby selling non-food goods	0.8%	2	1.5%	1	0.5%	1	12.5%	1	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Choice of shops selling food goods	0.8%	[illegible]	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	0.0%	0
Cleanliness	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Delivery service	3.6%	9	0.0%	0	4.8%	9	12.5%	1	5.3%	1	3.1%	1	3.3%	2	4.8%	2	1.2%	1
Easy to get to by car	0.8%	2	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	1.2%	1
Entertainment / events	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Good internal layout	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Good service / friendly staff	1.6%	4	3.1%	2	1.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	2.4%	2
Habit / always use it / preference for retailer	5.2%	13	6.2%	4	4.8%	9	0.0%	0	10.5%	2	3.1%	1	3.3%	2	4.8%	2	6.1%	5
Internet shopping is convenient	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lower prices	19.1%	48	20.0%	13	18.8%	35	37.5%	3	31.6%	6	21.9%	7	15.0%	9	23.8%	10	14.6%	12
Loyalty card / points scheme	1.6%	4	3.1%	2	1.1%	2	0.0%	0	0.0%	0	3.1%	1	1.7%	1	0.0%	0	2.4%	2
Near to home	28.7%	72	32.3%	21	27.4%	51	12.5%	1	21.1%	4	40.6%	13	30.0%	18	11.9%	5	32.9%	27
Near to work	2.0%	5	1.5%	1	2.2%	4	0.0%	0	5.3%	1	0.0%	0	3.3%	2	4.8%	2	0.0%	0
Nice shopping environment	1.6%	4	1.5%	1	1.6%	3	0.0%	0	0.0%	0	0.0%	0	1.7%	1	4.8%	2	1.2%	1
Only one in the area / no other choice	2.4%	6	1.5%	1	2.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	6.1%	5
Preference for retailer	0.8%	2	1.5%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	0.0%	0
Provision of leisure facilities nearby	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Provision of services nearby, such as banks and other financial services	1.6%	4	0.0%	0	2.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	2	1.2%	1
Public information, signposts and public facilities	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Quality of food goods available	3.2%	8	4.6%	3	2.7%	5	0.0%	0	0.0%	0	3.1%	1	5.0%	3	7.1%	3	1.2%	1
Quality of shops selling food goods	0.8%	2	0.0%	0	1.1%	2	0.0%	0	5.3%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Safety (during the day)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Safety (during the evening / night time)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Staff discount / work there	0.8%	2	0.0%	0	1.1%	2	0.0%	0	5.3%	1	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Value for money	2.8%	7	1.5%	1	3.2%	6	0.0%	0	10.5%	2	6.3%	2	3.3%	2	0.0%	0	1.2%	1
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / no reason in particular)	5.2%	13	1.5%	1	6.5%	12	0.0%	0	0.0%	0	6.3%	2	8.3%	5	4.8%	2	4.9%	4
Base:		251		65		186		8		19		32		60		42		82

Q03ADo you ever use any store in Duns town centre for your main food shopping?
Those who do not mention Co-op or Costcutter, Duns at Q01

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Yes	25.9%	51	20.4%	11	28.0%	40	37.5%	3	11.1%	2	29.6%	8	26.5%	13	25.0%	9	25.9%	14
No	74.1%	146	79.6%	43	72.0%	103	62.5%	5	88.9%	16	70.4%	19	73.5%	36	75.0%	27	74.1%	40
(Don't know)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		197		54		143		8		18		27		49		36		54

Q04 Why do you not use stores in Duns Town Centre for your main food shopping? [MR]
Those who do not visit Duns Town Centre at Q03A

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Too far away from home or work	19.9%	29	16.3%	7	21.4%	22	0.0%	0	25.0%	4	26.3%	5	11.1%	4	18.5%	5	27.5%	11
Choice of leisure facilities (cinema, gym, pubs etc)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Choice of services (hairdressers, banks etc)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Environmental quality of centre	0.7%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	2.8%	1	0.0%	0	0.0%	0
Lack of choice and range of shops	44.5%	65	39.5%	17	46.6%	48	60.0%	3	31.3%	5	47.4%	9	50.0%	18	40.7%	11	40.0%	16
Not accessible by public transport	1.4%	2	0.0%	0	1.9%	2	0.0%	0	0.0%	0	0.0%	0	2.8%	1	3.7%	1	0.0%	0
Inconveniently located car parking	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Expensive car parking	0.7%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nothing, no reason to visit	7.5%	11	9.3%	4	6.8%	7	0.0%	0	0.0%	0	0.0%	0	8.3%	3	14.8%	4	10.0%	4
Too expensive	32.2%	47	32.6%	14	32.0%	33	40.0%	2	37.5%	6	31.6%	6	38.9%	14	33.3%	9	25.0%	10
Don't like the Co-op store	1.4%	2	2.3%	1	1.0%	1	0.0%	0	6.3%	1	0.0%	0	0.0%	0	0.0%	0	2.5%	1
(Don't know)	0.7%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	1
Base:		146		43		103		5		16		19		36		27		40

Mean score: Main food shop spend [£]

Q05 How much does your household normally spend on main food shopping in a week?

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
£1-10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£11-20	2.4%	6	3.1%	2	2.2%	4	0.0%	0	0.0%	0	6.3%	2	1.7%	1	0.0%	0	3.7%	3
£21-30	4.8%	12	6.2%	4	4.3%	8	0.0%	0	0.0%	0	3.1%	1	3.3%	2	2.4%	1	8.5%	7
£31-40	10.4%	26	15.4%	10	8.6%	16	0.0%	0	10.5%	2	3.1%	1	10.0%	6	14.3%	6	13.4%	11
£41-50	11.2%	28	13.8%	9	10.2%	19	37.5%	3	10.5%	2	9.4%	3	3.3%	2	11.9%	5	14.6%	12
£51-60	8.4%	21	6.2%	4	9.1%	17	0.0%	0	10.5%	2	6.3%	2	8.3%	5	9.5%	4	8.5%	7
£61-70	6.4%	16	3.1%	2	7.5%	14	12.5%	1	0.0%	0	3.1%	1	10.0%	6	7.1%	3	3.7%	3
£71-80	9.2%	23	1.5%	1	11.8%	22	0.0%	0	15.8%	3	3.1%	1	13.3%	8	11.9%	5	7.3%	6
£81-90	1.6%	4	3.1%	2	1.1%	2	0.0%	0	5.3%	1	6.3%	2	1.7%	1	0.0%	0	0.0%	0
£91-100	14.3%	36	13.8%	9	14.5%	27	12.5%	1	15.8%	3	28.1%	9	23.3%	14	14.3%	6	3.7%	3
£101-150	13.1%	33	13.8%	9	12.9%	24	12.5%	1	21.1%	4	21.9%	7	15.0%	9	11.9%	5	8.5%	7
£151-200	1.2%	3	0.0%	0	1.6%	3	0.0%	0	0.0%	0	0.0%	0	3.3%	2	0.0%	0	1.2%	1
£201+	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	15.1%	38	18.5%	12	14.0%	26	25.0%	2	10.5%	2	6.3%	2	6.7%	4	16.7%	7	22.0%	18
(Refused)	1.6%	4	1.5%	1	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	4
Mean:		*76.6*		*69.3*		*79.0*		*71.7*		*85.8*		*93.2*		*84.6*		*74.4*		*61.8*
Base:		251		65		186		8		19		32		60		42		82

Mean Score [100% = 100, 90% = 90, 80% = 80, 70% = 70, 60% = 60, 50% or less = 25]

Q06 Of your weekly food shopping budget what percentage do you spend on your main food shop?

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
100%	13.9%	35	15.4%	10	13.4%	25	12.5%	1	21.1%	4	12.5%	4	13.3%	8	9.5%	4	14.6%	12
90%	22.3%	56	26.2%	17	21.0%	39	25.0%	2	21.1%	4	21.9%	7	18.3%	11	28.6%	12	23.2%	19
80%	17.1%	43	12.3%	8	18.8%	35	25.0%	2	21.1%	4	21.9%	7	21.7%	13	16.7%	7	9.8%	8
70%	9.2%	23	7.7%	5	9.7%	18	12.5%	1	5.3%	1	6.3%	2	16.7%	10	14.3%	6	3.7%	3
60%	4.4%	11	6.2%	4	3.8%	7	0.0%	0	0.0%	0	6.3%	2	3.3%	2	0.0%	0	8.5%	7
50% or less	9.2%	23	9.2%	6	9.1%	17	12.5%	1	0.0%	0	6.3%	2	10.0%	6	9.5%	4	11.0%	9
(Don't know / varies)	23.9%	60	23.1%	15	24.2%	45	12.5%	1	31.6%	6	25.0%	8	16.7%	10	21.4%	9	29.3%	24
Mean:		*77.6*		*78.2*		*77.4*		*76.4*		*88.5*		*79.2*		*76.0*		*77.6*		*76.0*
Base:		251		65		186		8		19		32		60		42		82

Q07 How often do you normally do your main food shopping at (STORE MENTIONED AT Q01)?

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Daily	0.8%	2	1.5%	1	0.5%	1	0.0%	0	0.0%	0	3.1%	1	0.0%	0	0.0%	0	1.2%	1
At least two times a week	6.8%	17	3.1%	2	8.1%	15	0.0%	0	10.5%	2	0.0%	0	0.0%	0	9.5%	4	13.4%	11
At least once a week	66.5%	167	72.3%	47	64.5%	120	87.5%	7	73.7%	14	65.6%	21	61.7%	37	59.5%	25	70.7%	58
At least once a fortnight	15.5%	39	12.3%	8	16.7%	31	12.5%	1	15.8%	3	18.8%	6	20.0%	12	21.4%	9	7.3%	6
At least once a month	6.4%	16	4.6%	3	7.0%	13	0.0%	0	0.0%	0	6.3%	2	10.0%	6	7.1%	3	6.1%	5
At least every two months	0.8%	2	0.0%	0	1.1%	2	0.0%	0	0.0%	0	3.1%	1	1.7%	1	0.0%	0	0.0%	0
Less often	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Have only visited once	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	3.2%	8	6.2%	4	2.2%	4	0.0%	0	0.0%	0	3.1%	1	6.7%	4	2.4%	1	1.2%	1
Base:		251		65		186		8		19		32		60		42		82

Q08 How do you normally travel to (STORE MENTIONED AT Q01)?
Not those who shop online at Q01

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Car / van (as driver)	78.6%	187	81.5%	53	77.5%	134	71.4%	5	83.3%	15	79.3%	23	84.2%	48	84.6%	33	71.6%	58
Car / van (as passenger)	11.3%	27	7.7%	5	12.7%	22	14.3%	1	11.1%	2	10.3%	3	7.0%	4	15.4%	6	12.3%	10
Bus, minibus or coach	1.7%	4	1.5%	1	1.7%	3	0.0%	0	5.6%	1	0.0%	0	1.8%	1	0.0%	0	2.5%	2
Motorcycle, scooter or moped	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	7.1%	17	6.2%	4	7.5%	13	0.0%	0	0.0%	0	6.9%	2	5.3%	3	0.0%	0	13.6%	11
Taxi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Metro	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bicycle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter / disability vehicle	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.3%	3	3.1%	2	0.6%	1	14.3%	1	0.0%	0	3.4%	1	1.8%	1	0.0%	0	0.0%	0
Base:		238		65		173		7		18		29		57		39		81

Q09 When you go main food shopping is your trip linked with any other activity?
Not those who shop online at Q01

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Yes – non-food shopping	10.5%	25	6.2%	4	12.1%	21	14.3%	1	0.0%	0	10.3%	3	14.0%	8	10.3%	4	8.6%	7
Yes – other-food shopping	3.4%	8	3.1%	2	3.5%	6	0.0%	0	0.0%	0	0.0%	0	3.5%	2	10.3%	4	2.5%	2
Yes – visiting services such as banks and other financial institutions	3.4%	8	3.1%	2	3.5%	6	0.0%	0	0.0%	0	6.9%	2	1.8%	1	2.6%	1	3.7%	3
Yes – leisure activity (bowling, bingo, cinema)	5.0%	12	6.2%	4	4.6%	8	0.0%	0	5.6%	1	6.9%	2	5.3%	3	0.0%	0	7.4%	6
Yes – travelling to / from work	8.4%	20	6.2%	4	9.2%	16	0.0%	0	11.1%	2	10.3%	3	10.5%	6	15.4%	6	3.7%	3
Yes – travelling to / from school / college / university	0.4%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	3.4%	1	0.0%	0	0.0%	0	0.0%	0
Yes – getting petrol	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Yes – visiting café / pub / restaurant	6.7%	16	6.2%	4	6.9%	12	14.3%	1	5.6%	1	3.4%	1	0.0%	0	5.1%	2	12.3%	10
Yes – visiting health service such as doctor, dentist, hospital	2.1%	5	0.0%	0	2.9%	5	0.0%	0	5.6%	1	0.0%	0	3.5%	2	5.1%	2	0.0%	0
Yes – visiting other service such as laundrette, dry cleaning, key cutting, hairdresser, health and beauty, tanning etc.	2.1%	5	1.5%	1	2.3%	4	14.3%	1	0.0%	0	0.0%	0	3.5%	2	0.0%	0	2.5%	2
Yes – getting petrol	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Yes – visiting family / friends	5.0%	12	7.7%	5	4.0%	7	0.0%	0	0.0%	0	6.9%	2	5.3%	3	5.1%	2	6.2%	5
Yes – other activity	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
No activity	50.8%	121	58.5%	38	48.0%	83	57.1%	4	66.7%	12	44.8%	13	49.1%	28	46.2%	18	53.1%	43
(Don't know / varies)	1.7%	4	0.0%	0	2.3%	4	0.0%	0	5.6%	1	6.9%	2	1.8%	1	0.0%	0	0.0%	0
Base:		238		65		173		7		18		29		57		39		81

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	

Q10 Where do you do this linked trip?
Those who link their trip at Q09 (But not friends / family)

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Marks & Spencer, Berwick-upon-Tweed	1.0%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0
Morrisons, North Road, Berwick-upon-Tweed	1.0%	1	4.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0
Tesco Extra, Paton Street, Galashiels	1.0%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1
Tesco, Berwick-upon-Tweed	1.0%	1	0.0%	0	1.3%	1	33.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Dunbar	1.0%	1	4.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0
Berwick-upon-Tweed	61.4%	62	68.2%	15	59.5%	47	66.7%	2	60.0%	3	75.0%	9	60.0%	15	57.9%	11	60.6%	20
Duns	15.8%	16	13.6%	3	16.5%	13	0.0%	0	20.0%	1	8.3%	1	4.0%	1	10.5%	2	30.3%	10
Edinburgh City Centre	4.0%	4	0.0%	0	5.1%	4	0.0%	0	0.0%	0	0.0%	0	8.0%	2	5.3%	1	0.0%	0
Eyemouth	1.0%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0
Galashiels	6.9%	7	4.5%	1	7.6%	6	0.0%	0	0.0%	0	16.7%	2	8.0%	2	15.8%	3	0.0%	0
Kelso	2.0%	2	0.0%	0	2.5%	2	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	3.0%	1
Newtown St Boswells	1.0%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.3%	1	0.0%	0
(Don't know / varies)	3.0%	3	4.5%	1	2.5%	2	0.0%	0	20.0%	1	0.0%	0	4.0%	1	0.0%	0	3.0%	1
Base:		101		22		79		3		5		12		25		19		33

Mean score: Linked trip spend [£]

Q10A Typically how much do you spend on this linked trip ?
Those who link their trip at Q09 (But not friends / family)

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
£0	12.9%	13	13.6%	3	12.7%	10	0.0%	0	20.0%	1	8.3%	1	8.0%	2	26.3%	5	12.1%	4
£1-10	14.9%	15	13.6%	3	15.2%	12	0.0%	0	0.0%	0	8.3%	1	4.0%	1	15.8%	3	27.3%	9
£11-20	9.9%	10	13.6%	3	8.9%	7	33.3%	1	20.0%	1	0.0%	0	4.0%	1	5.3%	1	18.2%	6
£21-30	3.0%	3	0.0%	0	3.8%	3	0.0%	0	0.0%	0	0.0%	0	12.0%	3	0.0%	0	0.0%	0
£31-40	3.0%	3	0.0%	0	3.8%	3	0.0%	0	0.0%	0	16.7%	2	0.0%	0	0.0%	0	3.0%	1
£41-50	5.0%	5	9.1%	2	3.8%	3	0.0%	0	0.0%	0	0.0%	0	12.0%	3	5.3%	1	3.0%	1
£51-60	1.0%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0
£61-70	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£71-80	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£81-90	1.0%	1	0.0%	0	1.3%	1	33.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£91-100	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£101-110	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£111-120	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£121+	1.0%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0
(Don't know / varies)	40.6%	41	31.8%	7	43.0%	34	33.3%	1	40.0%	2	50.0%	6	40.0%	10	42.1%	8	33.3%	11
(Refused)	7.9%	8	18.2%	4	5.1%	4	0.0%	0	20.0%	1	16.7%	2	12.0%	3	5.3%	1	3.0%	1
Mean:		*19.3*		*15.2*		*20.4*		*55.0*		*7.5*		*20.0*		*38.8*		*8.0*		*11.6*
Base:		101		22		79		3		5		12		25		19		33

Q11 Do you make 'top up' shopping trips for staple goods, such as bread and milk, in between your main food shopping trip?

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Yes	75.7%	190	75.4%	49	75.8%	141	87.5%	7	78.9%	15	78.1%	25	83.3%	50	69.0%	29	73.2%	60
No	24.3%	61	24.6%	16	24.2%	45	12.5%	1	21.1%	4	21.9%	7	16.7%	10	31.0%	13	26.8%	22
Base:		251		65		186		8		19		32		60		42		82

Q12 Where did you last go to undertake this 'top-up' shopping?
Those who do top-up shopping at Q11

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Aldi, North Road, Berwick-upon-Tweed	3.2%	6	0.0%	0	4.3%	6	14.3%	1	6.7%	1	8.0%	2	0.0%	0	0.0%	0	3.3%	2
Asda, Currie Road, Galashiels	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Asda, Main Street, Tweedmouth (Berwick)	1.6%	3	0.0%	0	2.1%	3	0.0%	0	0.0%	0	4.0%	1	0.0%	0	6.9%	2	0.0%	0
Co-op, 70 High Street, Selkirk	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Highcroft, Kelso	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Co-op, Newtown St, Duns	57.4%	109	53.1%	26	58.9%	83	42.9%	3	46.7%	7	56.0%	14	64.0%	32	62.1%	18	55.0%	33
Costcutter, Murray St, Duns	6.3%	12	10.2%	5	5.0%	7	0.0%	0	6.7%	1	4.0%	1	4.0%	2	0.0%	0	10.0%	6
Farmfoods, Berwick-upon-Tweed	1.1%	2	2.0%	1	0.7%	1	0.0%	0	6.7%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Marks & Spencer, Berwick-upon-Tweed	1.1%	2	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	1	3.4%	1	0.0%	0
Morrisons, North Road, Berwick-upon-Tweed	5.8%	11	6.1%	3	5.7%	8	0.0%	0	0.0%	0	4.0%	1	6.0%	3	3.4%	1	10.0%	6
Tesco Extra, Paton Street, Galashiels	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Tesco, Berwick-upon-Tweed	3.7%	7	6.1%	3	2.8%	4	14.3%	1	0.0%	0	0.0%	0	6.0%	3	3.4%	1	3.3%	2
Asda, Spott Road, Dunbar	1.6%	3	0.0%	0	2.1%	3	0.0%	0	6.7%	1	4.0%	1	0.0%	0	3.4%	1	0.0%	0
Co-op, Duns Road, Gifford	0.5%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Co-op, Main Street, Chirnside	12.1%	23	18.4%	9	9.9%	14	28.6%	2	26.7%	4	8.0%	2	14.0%	7	10.3%	3	8.3%	5
Local shops, Berwick-upon-Tweed	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Local shops, Chirnside	0.5%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Cornhill-on-Tweed	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Local shops, Duns	1.1%	2	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	1.7%	1
Morrisons, The Gyle Centre, Edinburgh	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
(Don't know / varies)	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0	0.0%	0
Base:		190		49		141		7		15		25		50		29		60

Q12AWhere do you normally go for 'top-up' shopping?
Those who do top-up shopping at Q11

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Aldi, North Road, Berwick-upon-Tweed	3.2%	6	0.0%	0	4.3%	6	14.3%	1	6.7%	1	8.0%	2	0.0%	0	0.0%	0	3.3%	2
Asda, Currie Road, Galashiels	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Asda, Main Street, Tweedmouth (Berwick)	1.6%	3	0.0%	0	2.1%	3	0.0%	0	0.0%	0	4.0%	1	0.0%	0	6.9%	2	0.0%	0
Co-op, 70 High Street, Selkirk	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Highcroft, Kelso	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Co-op, Newtown St, Duns	56.8%	108	51.0%	25	58.9%	83	42.9%	3	46.7%	7	56.0%	14	62.0%	31	62.1%	18	53.3%	32
Costcutter, Murray St, Duns	5.3%	10	6.1%	3	5.0%	7	0.0%	0	6.7%	1	0.0%	0	6.0%	3	0.0%	0	8.3%	5
Farmfoods, Berwick-upon-Tweed	1.1%	2	2.0%	1	0.7%	1	0.0%	0	6.7%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Marks & Spencer, Berwick-upon-Tweed	1.1%	2	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	1	3.4%	1	0.0%	0
Morrisons, North Road, Berwick-upon-Tweed	5.3%	10	8.2%	4	4.3%	6	0.0%	0	0.0%	0	0.0%	0	4.0%	2	3.4%	1	11.7%	7
Tesco Extra, Paton Street, Galashiels	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Tesco, Berwick-upon-Tweed	4.2%	8	6.1%	3	3.5%	5	14.3%	1	0.0%	0	0.0%	0	8.0%	4	3.4%	1	3.3%	2
Asda, Spott Road, Dunbar	1.6%	3	0.0%	0	2.1%	3	0.0%	0	6.7%	1	4.0%	1	0.0%	0	3.4%	1	0.0%	0
Co-op, Duns Road, Gifford	0.5%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Co-op, Main Street, Chirnside	12.6%	24	18.4%	9	10.6%	15	28.6%	2	26.7%	4	12.0%	3	14.0%	7	10.3%	3	8.3%	5
Local shops, Berwick-upon-Tweed	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Local shops, Chirnside	0.5%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Cornhill-on-Tweed	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Local shops, Duns	1.6%	3	2.0%	1	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	3.3%	2
Morrisons, The Gyle Centre, Edinburgh	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
(Don't know / varies)	1.1%	2	2.0%	1	0.7%	1	0.0%	0	0.0%	0	8.0%	2	0.0%	0	0.0%	0	0.0%	0
Base:		190		49		141		7		15		25		50		29		60

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	

Q12B Are there any other stores that you regularly use for 'top-up' shopping? [MR]
Those who do top-up shopping at Q11

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Asda, Currie Road, Galashiels	1.1%	2	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	1	3.4%	1	0.0%	0
Asda, Main Street, Tweedmouth (Berwick)	1.6%	3	0.0%	0	2.1%	3	14.3%	1	0.0%	0	4.0%	1	2.0%	1	0.0%	0	0.0%	0
Asda, The Jewel / Newcraighall, Edinburgh	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	1	0.0%	0
Co-op, Newtown St, Duns	2.1%	4	2.0%	1	2.1%	3	0.0%	0	0.0%	0	4.0%	1	2.0%	1	0.0%	0	3.3%	2
Costcutter, Murray St, Duns	7.9%	15	2.0%	1	9.9%	14	0.0%	0	6.7%	1	8.0%	2	8.0%	4	6.9%	2	8.3%	5
Lidl, Shedden Park Road, Kelso	2.1%	4	2.0%	1	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.7%	4
Marks & Spencer, Berwick-upon-Tweed	2.6%	5	2.0%	1	2.8%	4	0.0%	0	0.0%	0	4.0%	1	0.0%	0	3.4%	1	5.0%	3
Morrisons, North Road, Berwick-upon-Tweed	1.1%	2	2.0%	1	0.7%	1	0.0%	0	0.0%	0	4.0%	1	0.0%	0	0.0%	0	1.7%	1
Tesco Extra, Paton Street, Galashiels	1.1%	2	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	2	0.0%	0
Tesco, Berwick-upon-Tweed	1.1%	2	0.0%	0	1.4%	2	0.0%	0	6.7%	1	4.0%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, North Berwick, East Lothian	0.5%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Internet / home delivery	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Co-op, Main Street, Chirnside	1.6%	3	2.0%	1	1.4%	2	0.0%	0	6.7%	1	0.0%	0	0.0%	0	3.4%	1	1.7%	1
Local shops, Berwick-upon-Tweed	2.1%	4	0.0%	0	2.8%	4	0.0%	0	0.0%	0	0.0%	0	2.0%	1	3.4%	1	3.3%	2
Local shops, Chirnside	0.5%	1	0.0%	0	0.7%	1	0.0%	0	6.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Duns	2.1%	4	2.0%	1	2.1%	3	0.0%	0	0.0%	0	0.0%	0	2.0%	1	6.9%	2	1.7%	1
Local shops, Greenlaw	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
Sainsbury's, Pinnaclehill Industrial Estate, Kelso	1.1%	2	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0	4.0%	2	0.0%	0	0.0%	0
(Don't know / varies)	0.5%	1	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0
(No others)	70.0%	133	81.6%	40	66.0%	93	85.7%	6	73.3%	11	72.0%	18	72.0%	36	65.5%	19	66.7%	40
Base:		190		49		141		7		15		25		50		29		60

Q13 How often do you make 'top up' shopping trips to (STORE MENTIONED AT Q11)?
Those who do top-up shopping at Q11

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Daily	6.3%	12	10.2%	5	5.0%	7	0.0%	0	6.7%	1	0.0%	0	8.0%	4	10.3%	3	6.7%	4
At least two times a week	54.2%	103	34.7%	17	61.0%	86	57.1%	4	40.0%	6	68.0%	17	50.0%	25	69.0%	20	46.7%	28
At least once a week	28.4%	54	38.8%	19	24.8%	35	28.6%	2	46.7%	7	28.0%	7	32.0%	16	13.8%	4	28.3%	17
At least once a fortnight	6.3%	12	12.2%	6	4.3%	6	14.3%	1	0.0%	0	4.0%	1	6.0%	3	6.9%	2	8.3%	5
At least once a month	1.6%	3	2.0%	1	1.4%	2	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	3.3%	2
At least every two months	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Less often	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Have only visited once	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.6%	5	2.0%	1	2.8%	4	0.0%	0	6.7%	1	0.0%	0	2.0%	1	0.0%	0	5.0%	3
Base:		190		49		141		7		15		25		50		29		60

GEN Gender of respondent.

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Male	25.9%	65	100.0%	65	0.0%	0	25.0%	2	10.5%	2	28.1%	9	16.7%	10	26.2%	11	35.4%	29
Female	74.1%	186	0.0%	0	100.0%	186	75.0%	6	89.5%	17	71.9%	23	83.3%	50	73.8%	31	64.6%	53
Base:		251		65		186		8		19		32		60		42		82

AGE Could I ask, how old are you?

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
18 to 24	3.2%	8	3.1%	2	3.2%	6	100.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
25 to 34	7.6%	19	3.1%	2	9.1%	17	0.0%	0	100.0%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0
35 to 44	12.7%	32	13.8%	9	12.4%	23	0.0%	0	0.0%	0	100.0%	32	0.0%	0	0.0%	0	0.0%	0
45 to 54	23.9%	60	15.4%	10	26.9%	50	0.0%	0	0.0%	0	0.0%	0	100.0%	60	0.0%	0	0.0%	0
55 to 64	16.7%	42	16.9%	11	16.7%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	42	0.0%	0
65 +	32.7%	82	44.6%	29	28.5%	53	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	82
(Refused)	3.2%	8	3.1%	2	3.2%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		251		65		186		8		19		32		60		42		82

Appendix 4: Retail Impact Analysis Tables

	Total		Male		Female		18 to 24		25 to 34		35 to 44		45 to 54		55 to 64		65 +	
Q01 Where did you last go to undertake your main food and grocery shopping?																		
Aldi, North Road, Berwick-upon-Tweed	8.0%	20	13.8%	9	5.9%	11	0.0%	0	15.8%	3	0.0%	0	10.0%	6	7.1%	3	9.8%	8
Asda, Currie Road, Galashiels	4.0%	10	6.2%	4	3.2%	6	12.5%	1	5.3%	1	9.4%	3	3.3%	2	4.8%	2	1.2%	1
Asda, Main Street, Tweedmouth (Berwick)	3.6%	9	6.2%	4	2.7%	5	37.5%	3	15.8%	3	3.1%	1	1.7%	1	2.4%	1	0.0%	0
Co-op, High Street, Coldstream	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Co-op, Highcroft, Kelso	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Co-op, Newtown St, Duns	21.1%	53	15.4%	10	23.1%	43	0.0%	0	5.3%	1	15.6%	5	18.3%	11	14.3%	6	34.1%	28
Costcutter, Murray St, Duns	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Berwick-upon-Tweed	1.6%	4	0.0%	0	2.2%	4	0.0%	0	0.0%	0	9.4%	3	1.7%	1	0.0%	0	0.0%	0
Lidl, Shedden Park Road, Kelso	0.8%	2	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	1	2.4%	1	0.0%	0
Marks & Spencer, Berwick-upon-Tweed	1.2%	3	1.5%	1	1.1%	2	0.0%	0	0.0%	0	3.1%	1	1.7%	1	0.0%	0	1.2%	1
Morrisons, Moredun, Edinburgh	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Morrisons, North Road, Berwick-upon-Tweed	29.1%	73	27.7%	18	29.6%	55	37.5%	3	10.5%	2	31.3%	10	28.3%	17	38.1%	16	28.0%	23
Sainsbury's Local, High Street, Selkirk	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Tesco Extra, Paton Street, Galashiels	1.6%	4	0.0%	0	2.2%	4	0.0%	0	5.3%	1	3.1%	1	0.0%	0	4.8%	2	0.0%	0
Tesco, Berwick-upon-Tweed	13.9%	35	13.8%	9	14.0%	26	0.0%	0	26.3%	5	12.5%	4	18.3%	11	14.3%	6	11.0%	9
Tesco, Haddington, East Lothian	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Tesco, North Berwick, East Lothian	2.0%	5	4.6%	3	1.1%	2	0.0%	0	0.0%	0	3.1%	1	1.7%	1	0.0%	0	3.7%	3
Internet / home delivery	5.2%	13	0.0%	0	7.0%	13	12.5%	1	5.3%	1	9.4%	3	5.0%	3	7.1%	3	1.2%	1
Aldi, Whittingehame Drive, Haddington	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Asda, Spott Road, Dunbar	1.6%	4	1.5%	1	1.6%	3	0.0%	0	10.5%	2	0.0%	0	1.7%	1	2.4%	1	0.0%	0
Co-op, Castle Gate, Berwick-upon-Tweed	0.4%	1	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1
Co-op, Main Street, Chirnside	1.2%	3	3.1%	2	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	2.4%	2
Local shops, Berwick-upon-Tweed	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Sainsbury's, Pinnaclehill Industrial Estate, Kelso	1.6%	4	1.5%	1	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	1.2%	1
Base:		251		65		186		8		19		32		60		42		82

Co-operative Group: Langtongate, Duns

Quantitative Retail Turnover & Impact Assessment Tables

Jan-14

GL Hearn

Table 1 - Study Area Population

Year		
2013	**2015**	**2016**
8,704	8,822	8,885

Notes *Population data sourced from Scottish Borders Retail Study 2011. Table 2*

Table 2 - Study Area Convenience Expenditure Per Head

Year		
2013	**2015**	**2016**
£2,290	£2,309	£2,318

Notes *Goods based consumer expenditure per head derived from Experian Business Strategies Retail Planner Report*
3.7% deduction made from per capita expenditure rates to take account of SFT as per results of household survey.
Convenience expenditure growth rate of 0.4% per annum sourced from Experian Retail Planner Briefing Note 9, September 2012.
2012 Prices

Co-operative Group: Langtongate, Duns - Retail Analysis Tables

Table 3 - Convenience Expenditure Generated

	Year		
	2013	**2015**	**2016**
	£M	**£M**	**£M**
Study Area	£19.93	£20.37	£20.59

Notes *Product of Population (Table 1) and Expenditure per Head (Table 2).*

Co-operative Group: Langtongate, Duns - Retail Analysis Tables

Table 4 - Convenience Expenditure Generated - Main Food Shopping ***74%***

	Year		
	2013	**2015**	**2016**
	£M	**£M**	**£M**
Study Area	£14.75	£15.07	£15.24

Notes *Main food / Top up food shopping split advised by Household Survey as 74% / 26% overall*

Co-operative Group: Langtongate, Duns - Retail Analysis Tables

Table 5 - Convenience Expenditure Generated - Top Up Food Shopping ***26%***

	Year		
	2013	**2015**	**2016**
	£M	**£M**	**£M**
Study Area	£5.18	£5.30	£5.35

Notes *Main food / Top up food shopping split advised by Household Survey as 74% / 26% overall*

Table 6 - Main Food Shopping Market Share Patterns and Turnovers

	Zone 1	Main Food		
	%	2013	2015	2016
Within Catchment		**£14.75**	**£15.07**	**£15.24**
Co-op, Newtown St, Duns	11.18%	£1.65	£1.69	£1.70
Costcutter, Murray St, Duns	0.63%	£0.09	£0.09	£0.10
Local shops, Duns	0.29%	£0.04	£0.04	£0.04
Co-op, Main Street, Chirnside	0.80%	£0.12	£0.12	£0.12
Outwith Catchment				
Co-op, Duns Road, Gifford	0.09%	£0.01	£0.01	£0.01
Asda, Currie Road, Galashiels	5.95%	£0.88	£0.90	£0.91
Tesco Extra, Paton Street, Galashiels	2.97%	£0.44	£0.45	£0.45
Aldi, King Street, Galashiels	0.11%	£0.02	£0.02	£0.02
Morrisons, North Road, Berwick-upon-Tweed	25.61%	£3.78	£3.86	£3.90
Tesco, Berwick-upon-Tweed	16.15%	£2.38	£2.43	£2.46
Aldi, North Road, Berwick-upon-Tweed	9.25%	£1.36	£1.39	£1.41
Asda, Main Street, Tweedmouth (Berwick)	6.73%	£0.99	£1.01	£1.03
Marks & Spencer, Berwick-upon-Tweed	2.48%	£0.37	£0.37	£0.38
Farmfoods, Berwick-upon-Tweed	2.75%	£0.41	£0.41	£0.42
Co-op, Castle Gate, Berwick-upon-Tweed	0.09%	£0.01	£0.01	£0.01
Local shops, Berwick-upon-Tweed	0.50%	£0.07	£0.08	£0.08
Sainsbury's, Pinnaclehill Industrial Estate, Kelso	2.18%	£0.32	£0.33	£0.33
Co-op, Highcroft, Kelso	0.23%	£0.03	£0.03	£0.03
Lidl, Shedden Park Road, Kelso	1.01%	£0.15	£0.15	£0.15
Sainsbury's Local, High Street, Selkirk	0.21%	£0.03	£0.03	£0.03
Co-op, Old Town, Peebles	0.21%	£0.03	£0.03	£0.03
Tesco, North Berwick, East Lothian	2.02%	£0.30	£0.30	£0.31
Tesco, Haddington, East Lothian	0.23%	£0.03	£0.03	£0.03
Aldi, Whittingehame Drive, Haddington	0.21%	£0.03	£0.03	£0.03
Asda, Spott Road, Dunbar	2.29%	£0.34	£0.34	£0.35
Waitrose, Morningside Road, Edinburgh	0.21%	£0.03	£0.03	£0.03
Asda, The Jewel / Newcraighall, Edinburgh	1.01%	£0.15	£0.15	£0.15
Morrisons, Moredun, Edinburgh	0.21%	£0.03	£0.03	£0.03
Tesco, Hardengreen, Eskbank, Dalkeith, Midlothian	0.70%	£0.10	£0.11	£0.11
Internet / home delivery	3.70%	£0.55	£0.56	£0.56

Table 7 - Top Up Food Shopping Market Share Patterns and Turnovers

	Zone 1 %	2013 £5.18	2015 £5.30	2016 £5.35
Within Catchment				
Co-op, Newtown St, Duns	50.70%	£2.63	£2.68	£2.71
Costcutter, Murray St, Duns	7.14%	£0.37	£0.38	£0.38
Local shops, Duns	1.69%	£0.09	£0.09	£0.09
Co-op, Main Street, Chirnside	14.07%	£0.73	£0.75	£0.75
Local shops, Chirnside	1.19%	£0.06	£0.06	£0.06
Outwith Catchment				
Asda, Currie Road, Galashiels	0.73%	£0.04	£0.04	£0.04
Tesco Extra, Paton Street, Galashiels	0.67%	£0.03	£0.04	£0.04
Co-op, Duns Road, Gifford	0.32%	£0.02	£0.02	£0.02
Local shops, Cornhill-on-Tweed	0.35%	£0.02	£0.02	£0.02
Local shops, Greenlaw	0.15%	£0.01	£0.01	£0.01
Aldi, North Road, Berwick-upon-Tweed	3.94%	£0.20	£0.21	£0.21
Asda, Main Street, Tweedmouth (Berwick)	2.34%	£0.12	£0.12	£0.13
Marks & Spencer, Berwick-upon-Tweed	1.66%	£0.09	£0.09	£0.09
Morrisons, North Road, Berwick-upon-Tweed	3.81%	£0.20	£0.20	£0.20
Tesco, Berwick-upon-Tweed	3.98%	£0.21	£0.21	£0.21
Local shops, Berwick-upon-Tweed	0.92%	£0.05	£0.05	£0.05
Farmfoods, Berwick-upon-Tweed	1.40%	£0.07	£0.07	£0.07
Lidl, Shedden Park Road, Kelso	0.55%	£0.03	£0.03	£0.03
Co-op, Highcroft, Kelso	0.35%	£0.02	£0.02	£0.02
Sainsbury's, Pinnaclehill Industrial Estate, Kelso	0.30%	£0.02	£0.02	£0.02
Co-op, 70 High Street, Selkirk	0.73%	£0.04	£0.04	£0.04
Asda, Spott Road, Dunbar	2.22%	£0.12	£0.12	£0.12
Tesco, North Berwick, East Lothian	0.14%	£0.01	£0.01	£0.01
Morrisons, The Gyle Centre, Edinburgh	0.32%	£0.02	£0.02	£0.02
Asda, The Jewel / Newcraighall, Edinburgh	0.18%	£0.01	£0.01	£0.01
Internet / home delivery	0.15%	£0.01	£0.01	£0.01

Table 8 - All Food Turnover

	Main Food 2013	Main Food 2015	Main Food 2016	Top Up 2013	Top Up 2015	Top Up 2016	Combined 2013	Combined 2015	Combined 2016
	£14.75	**£15.07**	**£15.24**	**£5.18**	**£5.30**	**£5.35**	**£19.93**	**£20.37**	**£20.59**
Within Catchment									
Co-op, Newtown St, Duns	£1.65	£1.69	£1.70	£2.63	£2.68	£2.71	£4.28	£4.37	£4.42
Costcutter, Murray St, Duns	£0.09	£0.09	£0.10	£0.37	£0.38	£0.38	£0.46	£0.47	£0.48
Local shops, Duns	£0.04	£0.04	£0.04	£0.09	£0.09	£0.09	£0.13	£0.13	£0.14
Co-op, Main Street, Chirnside	£0.12	£0.12	£0.12	£0.73	£0.75	£0.75	£0.85	£0.87	£0.88
Local shops, Chirnside	£0.00	£0.00	£0.00	£0.06	£0.06	£0.06	£0.06	£0.06	£0.06
							£5.78	**£5.90**	**£5.97**
Outwith Catchment									
Co-op, Duns Road, Gifford	£0.01	£0.01	£0.01	£0.02	£0.02	£0.02	£0.03	£0.03	£0.03
Asda, Currie Road, Galashiels	£0.88	£0.90	£0.91	£0.04	£0.04	£0.04	£0.92	£0.94	£0.95
Tesco Extra, Paton Street, Galashiels	£0.44	£0.45	£0.45	£0.03	£0.04	£0.04	£0.47	£0.48	£0.49
Aldi, King Street, Galashiels	£0.02	£0.02	£0.02	£0.00	£0.00	£0.00	£0.02	£0.02	£0.02
Morrisons, North Road, Berwick-upon-Tweed	£3.78	£3.86	£3.90	£0.20	£0.20	£0.20	£3.97	£4.06	£4.11
Tesco, Berwick-upon-Tweed	£2.38	£2.43	£2.46	£0.21	£0.21	£0.21	£2.59	£2.64	£2.67
Aldi, North Road, Berwick-upon-Tweed	£1.36	£1.39	£1.41	£0.20	£0.21	£0.21	£1.57	£1.60	£1.62
Asda, Main Street, Tweedmouth (Berwick)	£0.99	£1.01	£1.03	£0.12	£0.12	£0.13	£1.11	£1.14	£1.15
Marks & Spencer, Berwick-upon-Tweed	£0.37	£0.37	£0.38	£0.09	£0.09	£0.09	£0.45	£0.46	£0.47
Farmfoods, Berwick-upon-Tweed	£0.41	£0.41	£0.42	£0.07	£0.07	£0.07	£0.48	£0.49	£0.49
Co-op, Castle Gate, Berwick-upon-Tweed	£0.01	£0.01	£0.01	£0.00	£0.00	£0.00	£0.01	£0.01	£0.01
Local shops, Berwick-upon-Tweed	£0.07	£0.08	£0.08	£0.05	£0.05	£0.05	£0.12	£0.12	£0.13
Sainsbury's, Pinnaclehill Industrial Estate, Kelso	£0.32	£0.33	£0.33	£0.02	£0.02	£0.02	£0.34	£0.34	£0.35
Co-op, Highcroft, Kelso	£0.03	£0.03	£0.03	£0.02	£0.02	£0.02	£0.05	£0.05	£0.05
Lidl, Shedden Park Road, Kelso	£0.15	£0.15	£0.15	£0.03	£0.03	£0.03	£0.18	£0.18	£0.18
Sainsbury's Local, High Street, Selkirk	£0.03	£0.03	£0.03	£0.00	£0.00	£0.00	£0.03	£0.03	£0.03
Co-op, 70 High Street, Selkirk	£0.00	£0.00	£0.00	£0.04	£0.04	£0.04	£0.04	£0.04	£0.04
Co-op, Old Town, Peebles	£0.03	£0.03	£0.03	£0.00	£0.00	£0.00	£0.03	£0.03	£0.03
Tesco, North Berwick, East Lothian	£0.30	£0.30	£0.31	£0.01	£0.01	£0.01	£0.31	£0.31	£0.32
Tesco, Haddington, East Lothian	£0.03	£0.03	£0.03	£0.00	£0.00	£0.00	£0.03	£0.03	£0.03
Aldi, Whittingeharne Drive, Haddington	£0.03	£0.03	£0.03	£0.00	£0.00	£0.00	£0.03	£0.03	£0.03
Asda, Spott Road, Dunbar	£0.34	£0.34	£0.35	£0.12	£0.12	£0.12	£0.45	£0.46	£0.47
Morrisons, The Gyle Centre, Edinburgh	£0.00	£0.00	£0.00	£0.02	£0.02	£0.02	£0.02	£0.02	£0.02
Waitrose, Morningside Road, Edinburgh	£0.03	£0.03	£0.03	£0.00	£0.00	£0.00	£0.03	£0.03	£0.03
Asda, The Jewel / Newcraighall, Edinburgh	£0.15	£0.15	£0.15	£0.01	£0.01	£0.01	£0.16	£0.16	£0.16
Morrisons, Moredun, Edinburgh	£0.03	£0.03	£0.03	£0.00	£0.00	£0.00	£0.03	£0.03	£0.03
Tesco, Hardengreen, Eskbank, Dalkeith, Midlothian	£0.10	£0.11	£0.11	£0.00	£0.00	£0.00	£0.10	£0.11	£0.11
Local shops, Cornhill-on-Tweed	£0.00	£0.00	£0.00	£0.02	£0.02	£0.02	£0.02	£0.02	£0.02
Local shops, Greenlaw	£0.00	£0.00	£0.00	£0.01	£0.01	£0.01	£0.01	£0.01	£0.01
Internet / home delivery	£0.55	£0.56	£0.56	£0.01	£0.01	£0.01	£0.55	£0.57	£0.57

Table 9 - Proposed Sales Area & Turnover

Convenience Sales Area	Convenience Goods Sales Density	Convenience Goods Benchmark Turnover 2013	Convenience Goods Benchmark Turnover 2015	Convenience Goods Benchmark Turnover 2016
sqm	£/sqm	£m	£m	£m
702	£7,899	£5.55	£5.57	£5.58

Notes

Trading density is based on published company average (Verdict on Grocery 2012)
Allowance per annum for new stores turnover g. 0.15%

Table 10 - Analysis of Notable Overtrading

Store	Sales Floorspace	Estimated Convenience Sales Density	Convenience Benchmark Sales	Market Share Turnover from Study Area 2015	Turnover from Northumberland Retail Study 2015	Difference/ Overtrading 2015
	sqm	£/sqm	£m	£m		£m
						Overtrading
Co-op, Newtown Street, Duns	385	£7,836	£3.02	£4.37	N/A	£1.35
Morrisons, North Road, Berwick Upon Twee(	1,634	£12,737	£20.81		£43.78	£22.97
Tesco, Ord Drive, Berwick Upon Tweed	1,542	£11,384	£17.55		£19.32	£1.77

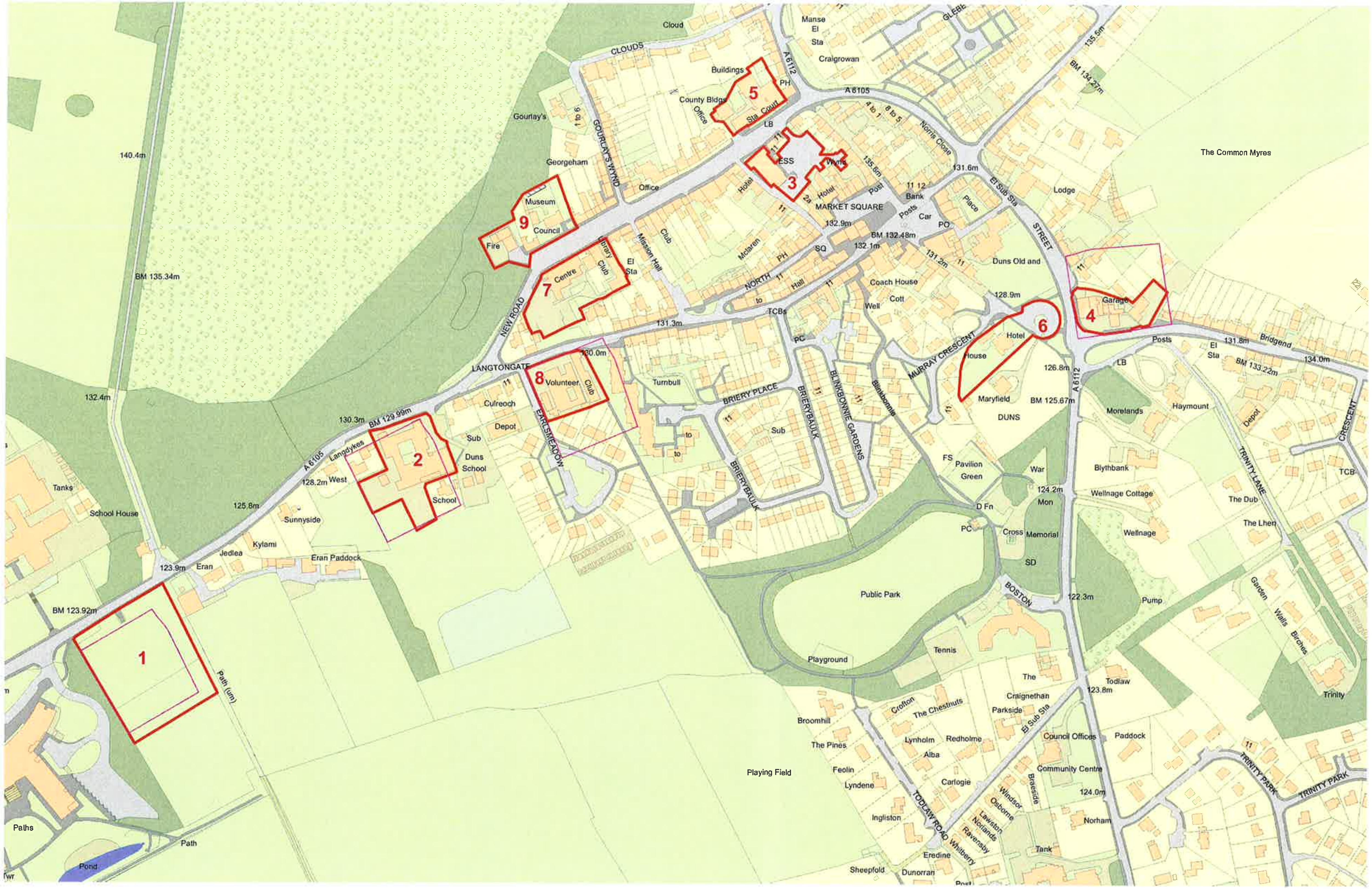
Notes

Company Average Trading Density - based upon published trading information provided in Retail Rankings and Verdict on Grocery Retailers.
Company Average Turnover - product of sales floorspace and company average trading density.
Difference between Implied V Benchmark shows the degree of overtrading within stores/centres.

Table 11 - Convenience Goods Trade Diversions

	Study Area 1	Weight	Study Area 1	Study Area 1	Total Diversion £5.57	2015 Pre Diversion Turnover	2014 Post Diversion Turnover	Trading Impact %
Within Catchment								
Co-op, Newtown St, Duns	21.46%	5.54	118.87%	78.52%	£4.37	£4.37	£0.00	100.00%
Costcutter, Murray St, Duns	2.32%	0.10	0.23%	0.15%	£0.01	£0.47	£0.46	1.81%
Local shops, Duns	0.66%	0.10	0.07%	0.04%	£0.00	£0.13	£0.13	1.81%
Co-op, Main Street, Chirnside	4.25%	0.00	0.00%	0.00%	£0.00	£0.87	£0.87	0.00%
Local shops, Chirnside	0.31%	0.00	0.00%	0.00%	£0.00	£0.06	£0.06	0.00%
Outwith Catchment								
Co-op, Duns Road, Gifford	0.15%	0.00	0.00%	0.00%	£0.00	£0.03	£0.03	0.00%
Asda, Currie Road, Galashiels	4.59%	0.50	2.30%	1.52%	£0.08	£0.94	£0.85	9.03%
Tesco Extra, Paton Street, Galashiels	2.37%	0.10	0.24%	0.16%	£0.01	£0.48	£0.47	1.81%
Aldi, King Street, Galashiels	0.08%	0.00	0.00%	0.00%	£0.00	£0.02	£0.02	0.00%
Morrisons, North Road, Berwick-upon-Tweed	19.94%	1.00	19.94%	13.17%	£0.73	£43.78	£43.05	1.67%
Tesco, Berwick-upon-Tweed	12.99%	0.75	9.74%	6.43%	£0.36	£19.32	£18.96	1.85%
Aldi, North Road, Berwick-upon-Tweed	7.87%	0.00	0.00%	0.00%	£0.00	£1.60	£1.60	0.00%
Asda, Main Street, Tweedmouth (Berwick)	5.59%	0.00	0.00%	0.00%	£0.00	£1.14	£1.14	0.00%
Marks & Spencer, Berwick-upon-Tweed	2.27%	0.00	0.00%	0.00%	£0.00	£0.46	£0.46	0.00%
Farmfoods, Berwick-upon-Tweed	2.40%	0.00	0.00%	0.00%	£0.00	£0.49	£0.49	0.00%
Co-op, Castle Gate, Berwick-upon-Tweed	0.07%	0.00	0.00%	0.00%	£0.00	£0.01	£0.01	0.00%
Local shops, Berwick-upon-Tweed	0.61%	0.00	0.00%	0.00%	£0.00	£0.12	£0.12	0.00%
Sainsbury's, Pinnaclehill Industrial Estate, Kelso	1.69%	0.00	0.00%	0.00%	£0.00	£0.34	£0.34	0.00%
Co-op, Highcroft, Kelso	0.26%	0.00	0.00%	0.00%	£0.00	£0.05	£0.05	0.00%
Lidl, Shedden Park Road, Kelso	0.89%	0.00	0.00%	0.00%	£0.00	£0.18	£0.18	0.00%
Sainsbury's Local, High Street, Selkirk	0.15%	0.00	0.00%	0.00%	£0.00	£0.03	£0.03	0.00%
Co-op, 70 High Street, Selkirk	0.19%	0.00	0.00%	0.00%	£0.00	£0.04	£0.04	0.00%
Co-op, Old Town, Peebles	0.16%	0.00	0.00%	0.00%	£0.00	£0.03	£0.03	0.00%
Tesco, North Berwick, East Lothian	1.53%	0.00	0.00%	0.00%	£0.00	£0.31	£0.31	0.00%
Tesco, Haddington, East Lothian	0.17%	0.00	0.00%	0.00%	£0.00	£0.03	£0.03	0.00%
Aldi, Whittingehame Drive, Haddington	0.15%	0.00	0.00%	0.00%	£0.00	£0.03	£0.03	0.00%
Asda, Spott Road, Dunbar	2.27%	0.00	0.00%	0.00%	£0.00	£0.46	£0.46	0.00%
Morrisons, The Gyle Centre, Edinburgh	0.08%	0.00	0.00%	0.00%	£0.00	£0.02	£0.02	0.00%
Waitrose, Morningside Road, Edinburgh	0.16%	0.00	0.00%	0.00%	£0.00	£0.03	£0.03	0.00%
Asda, The Jewel / Newcraighall, Edinburgh	0.79%	0.00	0.00%	0.00%	£0.00	£0.16	£0.16	0.00%
Morrisons, Moredun, Edinburgh	0.15%	0.00	0.00%	0.00%	£0.00	£0.03	£0.03	0.00%
Tesco, Hardengreen, Eskbank, Dalkeith, Midlothiar	0.52%	0.00	0.00%	0.00%	£0.00	£0.11	£0.11	0.00%
Local shops, Cornhill-on-Tweed	0.09%	0.00	0.00%	0.00%	£0.00	£0.02	£0.02	0.00%
Local shops, Greenlaw	0.04%	0.00	0.00%	0.00%	£0.00	£0.01	£0.01	0.00%
Internet / home delivery	2.78%	0.00	0.00%	0.00%	£0.00	£0.57	£0.57	0.00%
	100.00%		151.38%		£5.57	£76.76	£71.20	

Appendix 5: Sequential Site Analysis Plan



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architecture
design
development

client	
project:	Proposed New Store Duns
title:	Alternative Site Options
scale	1:2500 @ A2
date	19/08/13
drawn:	DNW
number:	9105/0-08 rev