

Moray Retail Study 2021

Final Report

Appendix A:  
Moray Strategic Retail Model  
2021

For Moray Council

March 2022



Hargest Planning Ltd

# **Moray Retail Study 2021**

## **Final Report**

### **Appendix A: Moray Strategic Retail Model 2021**

**For Moray Council**

**March 2022**

#### **reference:**

Contact: **Keith Hargest**

Tel: **07977 982357; 0131 516 1803**

Email: **[keith.hargest@btconnect.com](mailto:keith.hargest@btconnect.com)**

# Schedule of model scenarios

Scenario of Market Services				
A		MARKET CONCENTRATION		
Scenario	Test No.	Description		
Market Concentration	2	Reduce market share for Elgin CC and Edgar Road per annum		
		Conv	GC	BG
		0.0%	1.0%	0.5%
B		EXPENDITURE GROWTH AND SFT ASSUMPTIONS		
Scenario	Test no.	Description		
Annual Growth Rates	2	Experian Retail Planner 19 Central		
Assumptions for 2021 proportion accounted for by SFT				
		Moray		
Convenience		6.30%		
Gen Comparison		26.60%		
BG Comparison		26.60%		
C		SALES DENSITIES SSUMPTIONS		
Scenario	Test No.	Description		
Sales Densities	3	Change sales densities by RR change 2002-2020		

- 1 No change in market concentration 2021-2035
- 2 Reduce market share for Elgin CC and Edgar Road per annum:
- 3 Reduce market share for Elgin CC and Edgar Road per annum:

- 1 Precisely Oct 2021 Forecasts (2020-based)
- 2 Experian Jan 2022 Forecasts RPNB 19
- 3 Experian Retail Planner 18 Optimistic
- 4 Experian Retail Planner 18 Pessimistic

- 1 No change
- 2 Increase sales densities by Experian Nov 2020
- 3 Change sales densities by RR change 2002-2020

## SUMMARY RESULTS

CENTRE	Sector	Turnover £m				Sales Density as Percentage of Notional Average			
		2021	2025	2030	2035	2021	2025	2030	2035
Elgin City Centre	Convenience	£62.38m	£61.50m	£61.05m	£61.01m	89%	90%	93%	96%
	Gen Comp	£80.48m	£86.62m	£91.71m	£98.48m	90%	95%	98%	103%
	Bulky Goods	£12.01m	£13.16m	£14.25m	£15.65m	107%	115%	121%	130%
	All Goods	£154.87m	£161.28m	£167.01m	£175.14m	91%	95%	98%	102%
Edgar Road Commercial Centre	Convenience	£46.97m	£46.27m	£45.79m	£45.62m	97%	98%	100%	102%
	Gen Comp	£62.30m	£66.92m	£70.67m	£75.69m	135%	143%	147%	153%
	Bulky Goods	£33.65m	£36.79m	£39.82m	£43.69m	127%	136%	144%	154%
	All Goods	£142.92m	£149.98m	£156.28m	£165.01m	118%	124%	128%	135%
Forres Town Centre	Convenience	£6.62m	£6.51m	£6.66m	£6.76m	80%	81%	85%	95%
	Gen Comp	£5.53m	£6.18m	£7.09m	£8.12m	74%	81%	91%	101%
	Bulky Goods	£1.75m	£1.96m	£2.25m	£2.59m	106%	117%	131%	134%
	All Goods	£13.90m	£14.66m	£16.00m	£17.46m	80%	84%	92%	101%
Keith Town Centre	Convenience	£2.84m	£2.73m	£2.63m	£2.54m	65%	64%	64%	64%
	Gen Comp	£5.49m	£6.00m	£6.51m	£7.14m	92%	99%	105%	112%
	Bulky Goods	£2.62m	£2.90m	£3.18m	£3.52m	138%	150%	160%	173%
	All Goods	£10.95m	£11.62m	£12.31m	£13.21m	90%	95%	100%	107%
Buckie Town Centre	Convenience	£15.24m	£14.77m	£14.67m	£14.55m	93%	92%	94%	97%
	Gen Comp	£10.16m	£11.20m	£12.47m	£14.00m	91%	98%	106%	117%
	Bulky Goods	£1.43m	£1.58m	£1.76m	£1.98m	105%	114%	124%	136%
	All Goods	£26.84m	£27.55m	£28.90m	£30.52m	92%	95%	101%	107%
Lossiemouth	All Goods	£5.58m	£5.58m	£5.71m	£5.86m	91%	92%	95%	99%
Aberlour	All Goods	£3.99m	£4.06m	£4.06m	£4.13m	81%	83%	86%	89%
Dufftown	All Goods	£2.67m	£2.66m	£2.66m	£2.68m	77%	78%	79%	82%
Roths	All Goods	£1.31m	£1.32m	£1.34m	£1.36m	100%	102%	105%	109%
Cullen	All Goods	£3.68m	£3.80m	£4.01m	£4.27m	85%	88%	93%	99%
Fochabers	All Goods	£4.35m	£4.47m	£4.55m	£4.67m	93%	97%	100%	104%

**TABLE 1: POPULATION**

Scenario	Test no.	Description
2021	1	NRS 2018-based + 2021 HLA
2025	2	NRS 2018-based + 2021 HLA
2030	3	NRS 2018-based + 2021 HLA
2035	4	NRS 2018-based + 2021 HLA

Zone		Population						
		2011	2019	2020	2021	2025	2030	2035
1	Elgin City	23128	22548	22706	22910	23507	23695	24069
2	Elgin Rural	10917	13243	13166	13116	12883	12465	12036
3	Forres	15580	16604	16571	16571	16633	17082	17281
4	Lossiemouth	7926	7835	7816	7813	7643	7556	7403
5	Speyside & Glenlivet	8398	8090	8034	7995	7917	7734	7514
6	Keith	7783	7599	7564	7544	7379	7113	6848
7	Buckie	14763	15214	15181	15178	14982	14923	14760
8	Fochabers	4800	4686	4671	4665	4718	4604	4480
<b>Total Moray</b>		<b>93295</b>	<b>95820</b>	<b>95710</b>	<b>95792</b>	<b>95662</b>	<b>95170</b>	<b>94390</b>

**TABLE 2: RESIDENTS' AVAILABLE EXPENDITURE PER CAPITA**  
2019 Prices

Zone	Available Expenditure Per Capita - Gross Special Forms of Trading																	
	Convenience Goods						General Comparison Goods						Bulky Goods					
	2019	2020	2021	2025	2030	2035	2019	2020	2021	2025	2030	2035	2019	2020	2021	2025	2030	2035
1	£2,426	£2,637	£2,540	£2,495	£2,509	£2,527	£2,682	£2,727	£2,778	£3,083	£3,553	£4,104	£895	£910	£927	£1,029	£1,186	£1,370
2	£2,551	£2,773	£2,671	£2,623	£2,638	£2,657	£3,248	£3,302	£3,364	£3,733	£4,303	£4,970	£896	£911	£928	£1,030	£1,187	£1,371
3	£2,532	£2,752	£2,651	£2,604	£2,618	£2,637	£2,919	£2,968	£3,023	£3,355	£3,867	£4,467	£897	£912	£929	£1,031	£1,188	£1,373
4	£2,413	£2,623	£2,526	£2,481	£2,495	£2,513	£2,698	£2,743	£2,794	£3,101	£3,574	£4,129	£898	£913	£930	£1,032	£1,190	£1,374
5	£2,417	£2,627	£2,531	£2,486	£2,499	£2,518	£2,557	£2,600	£2,648	£2,939	£3,387	£3,913	£899	£914	£931	£1,033	£1,191	£1,376
6	£2,464	£2,678	£2,580	£2,534	£2,548	£2,567	£2,560	£2,603	£2,652	£2,943	£3,391	£3,918	£900	£915	£932	£1,035	£1,192	£1,377
7	£2,410	£2,619	£2,523	£2,478	£2,492	£2,510	£2,424	£2,464	£2,511	£2,786	£3,211	£3,709	£901	£916	£933	£1,036	£1,194	£1,379
8	£2,602	£2,828	£2,724	£2,676	£2,691	£2,710	£3,919	£3,984	£4,059	£4,505	£5,192	£5,997	£902	£917	£934	£1,037	£1,195	£1,380

Zone	Available Expenditure Per Capita - Net Special Forms of Trading																	
	Convenience Goods						General Comparison Goods						Bulky Goods					
	2019	2020	2021	2025	2030	2035	2019	2020	2021	2025	2030	2035	2019	2020	2021	2025	2030	2035
1	£2,327	£2,494	£2,380	£2,333	£2,331	£2,340	£2,194	£2,029	£2,039	£2,278	£2,547	£2,893	£732	£677	£680	£760	£850	£966
2	£2,446	£2,623	£2,503	£2,453	£2,451	£2,461	£2,657	£2,457	£2,469	£2,759	£3,085	£3,504	£733	£678	£681	£761	£851	£967
3	£2,428	£2,603	£2,484	£2,435	£2,432	£2,442	£2,388	£2,208	£2,219	£2,480	£2,773	£3,149	£734	£678	£682	£762	£852	£968
4	£2,314	£2,481	£2,367	£2,320	£2,318	£2,327	£2,207	£2,041	£2,051	£2,292	£2,563	£2,911	£735	£679	£683	£763	£853	£969
5	£2,318	£2,485	£2,371	£2,324	£2,322	£2,331	£2,092	£1,934	£1,944	£2,172	£2,429	£2,759	£735	£680	£683	£764	£854	£970
6	£2,363	£2,533	£2,417	£2,369	£2,367	£2,377	£2,094	£1,936	£1,946	£2,175	£2,432	£2,762	£736	£681	£684	£765	£855	£971
7	£2,311	£2,478	£2,364	£2,317	£2,315	£2,325	£1,983	£1,833	£1,843	£2,059	£2,302	£2,615	£737	£681	£685	£765	£856	£972
8	£2,495	£2,675	£2,553	£2,502	£2,500	£2,510	£3,206	£2,964	£2,979	£3,329	£3,722	£4,228	£738	£682	£686	£766	£857	£973

**TABLE 3: RESDIENTS' TOTAL AVAILABLE EXPENDITURE**

2019 Prices.

Zone	Available Expenditure Per Capita - Gross Special Forms of Trading																	
	Convenience Goods						General Comparison Goods						Bulky Goods					
	2019	2020	2021	2025	2030	2035	2019	2020	2021	2025	2030	2035	2019	2020	2021	2025	2030	2035
1	£54.7m	£59.9m	£58.2m	£58.6m	£59.4m	£60.8m	£60.5m	£61.9m	£63.6m	£72.5m	£84.2m	£98.8m	£20.2m	£20.7m	£21.2m	£24.2m	£28.1m	£33.0m
2	£33.8m	£36.5m	£35.0m	£33.8m	£32.9m	£32.0m	£43.0m	£43.5m	£44.1m	£48.1m	£53.6m	£59.8m	£11.9m	£12.0m	£12.2m	£13.3m	£14.8m	£16.5m
3	£42.0m	£45.6m	£43.9m	£43.3m	£44.7m	£45.6m	£48.5m	£49.2m	£50.1m	£55.8m	£66.1m	£77.2m	£14.9m	£15.1m	£15.4m	£17.1m	£20.3m	£23.7m
4	£18.9m	£20.5m	£19.7m	£19.0m	£18.9m	£18.6m	£21.1m	£21.4m	£21.8m	£23.7m	£27.0m	£30.6m	£7.0m	£7.1m	£7.3m	£7.9m	£9.0m	£10.2m
5	£19.6m	£21.1m	£20.2m	£19.7m	£19.3m	£18.9m	£20.7m	£20.9m	£21.2m	£23.3m	£26.2m	£29.4m	£7.3m	£7.3m	£7.4m	£8.2m	£9.2m	£10.3m
6	£18.7m	£20.3m	£19.5m	£18.7m	£18.1m	£17.6m	£19.5m	£19.7m	£20.0m	£21.7m	£24.1m	£26.8m	£6.8m	£6.9m	£7.0m	£7.6m	£8.5m	£9.4m
7	£36.7m	£39.8m	£38.3m	£37.1m	£37.2m	£37.1m	£36.9m	£37.4m	£38.1m	£41.7m	£47.9m	£54.7m	£13.7m	£13.9m	£14.2m	£15.5m	£17.8m	£20.4m
8	£12.2m	£13.2m	£12.7m	£12.6m	£12.4m	£12.1m	£18.4m	£18.6m	£18.9m	£21.3m	£23.9m	£26.9m	£4.2m	£4.3m	£4.4m	£4.9m	£5.5m	£6.2m
Total	£236.6m	£256.8m	£247.6m	£242.8m	£242.9m	£242.7m	£268.5m	£272.6m	£277.9m	£308.1m	£353.0m	£404.2m	£86.0m	£87.4m	£89.1m	£98.7m	£113.2m	£129.7m

Zone	Available Expenditure Per Capita - Net Special Forms of Trading																	
	Convenience Goods						General Comparison Goods						Bulky Goods					
	2019	2020	2021	2025	2030	2035	2019	2020	2021	2025	2030	2035	2019	2020	2021	2025	2030	2035
1	£52.5m	£56.6m	£54.5m	£54.8m	£55.2m	£56.3m	£49.5m	£46.1m	£46.7m	£53.6m	£60.4m	£69.6m	£16.5m	£15.4m	£15.6m	£17.9m	£20.1m	£23.2m
2	£32.4m	£34.5m	£32.8m	£31.6m	£30.5m	£29.6m	£35.2m	£32.3m	£32.4m	£35.5m	£38.5m	£42.2m	£9.7m	£8.9m	£8.9m	£9.8m	£10.6m	£11.6m
3	£40.3m	£43.1m	£41.2m	£40.5m	£41.6m	£42.2m	£39.6m	£36.6m	£36.8m	£41.2m	£47.4m	£54.4m	£12.2m	£11.2m	£11.3m	£12.7m	£14.6m	£16.7m
4	£18.1m	£19.4m	£18.5m	£17.7m	£17.5m	£17.2m	£17.3m	£16.0m	£16.0m	£17.5m	£19.4m	£21.5m	£5.8m	£5.3m	£5.3m	£5.8m	£6.4m	£7.2m
5	£18.8m	£20.0m	£19.0m	£18.4m	£18.0m	£17.5m	£16.9m	£15.5m	£15.5m	£17.2m	£18.8m	£20.7m	£5.9m	£5.5m	£5.5m	£6.0m	£6.6m	£7.3m
6	£18.0m	£19.2m	£18.2m	£17.5m	£16.8m	£16.3m	£15.9m	£14.6m	£14.7m	£16.0m	£17.3m	£18.9m	£5.6m	£5.1m	£5.2m	£5.6m	£6.1m	£6.6m
7	£3.0m	£37.6m	£35.9m	£34.7m	£34.5m	£34.3m	£30.2m	£27.8m	£28.0m	£30.8m	£34.4m	£38.6m	£11.2m	£10.3m	£10.4m	£11.5m	£12.8m	£14.3m
8	£11.7m	£12.5m	£11.9m	£11.8m	£11.5m	£11.2m	£15.0m	£13.8m	£13.9m	£15.7m	£17.1m	£18.9m	£3.5m	£3.2m	£3.2m	£3.6m	£3.9m	£4.4m
Total	£194.7m	£242.9m	£232.0m	£227.1m	£225.7m	£224.7m	£219.6m	£202.8m	£204.0m	£227.7m	£253.1m	£285.0m	£70.4m	£65.0m	£65.4m	£72.9m	£81.1m	£91.4m

**TABLE 4: TOURIST - NET AVAILABLE EXPENDITURE**  
**2019 Prices**

Zone	Tourism Expenditure to Zones - Net Special Forms of Trading																	
	Convenience Goods						General Comparison Goods						Bulky Goods					
	2019	2020	2021	2025	2030	2035	2019	2020	2021	2025	2030	2035	2019	2020	2021	2025	2030	2035
1	£0.12m	£0.06m	£0.12m	£0.13m	£0.14m	£0.14m	£1.48m	£0.74m	£1.48m	£1.62m	£1.81m	£2.02m	£0.00m	£0.00m	£0.00m	£0.00m	£0.0m	£0.0m
2	£0.30m	£0.15m	£0.30m	£0.31m	£0.33m	£0.35m	£1.06m	£0.53m	£1.06m	£1.16m	£1.30m	£1.45m	£0.00m	£0.00m	£0.00m	£0.00m	£0.0m	£0.0m
3	£0.21m	£0.10m	£0.21m	£0.22m	£0.23m	£0.24m	£0.97m	£0.49m	£0.97m	£1.06m	£1.19m	£1.32m	£0.00m	£0.00m	£0.00m	£0.00m	£0.0m	£0.0m
4	£0.69m	£0.34m	£0.69m	£0.72m	£0.76m	£0.81m	£2.56m	£1.28m	£2.56m	£2.80m	£3.12m	£3.48m	£0.00m	£0.00m	£0.00m	£0.00m	£0.0m	£0.0m
5	£0.20m	£0.10m	£0.20m	£0.21m	£0.22m	£0.24m	£1.18m	£0.59m	£1.18m	£1.29m	£1.44m	£1.61m	£0.00m	£0.00m	£0.00m	£0.00m	£0.0m	£0.0m
6	£0.02m	£0.01m	£0.02m	£0.02m	£0.02m	£0.02m	£0.17m	£0.09m	£0.17m	£0.19m	£0.21m	£0.23m	£0.00m	£0.00m	£0.00m	£0.00m	£0.0m	£0.0m
7	£0.38m	£0.19m	£0.38m	£0.40m	£0.42m	£0.45m	£1.57m	£0.79m	£1.57m	£1.72m	£1.92m	£2.14m	£0.00m	£0.00m	£0.00m	£0.00m	£0.0m	£0.0m
8	£0.23m	£0.11m	£0.23m	£0.24m	£0.25m	£0.27m	£0.90m	£0.45m	£0.90m	£0.99m	£1.10m	£1.23m	£0.00m	£0.00m	£0.00m	£0.00m	£0.0m	£0.0m
Total	£2.1m	£1.1m	£2.1m	£2.2m	£2.4m	£2.5m	£9.9m	£5.0m	£9.9m	£10.8m	£12.1m	£13.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m

TABLE 5A: CONVENIENCE EXPENDITURE FLOWS 2021  
FLOWS FROM ORIGIN ZONES  
2019 Prices

Zone	Total	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals			
		Zone 1: Elgin Town Centre  Zone 1: Elgin :Edgar Road  Other Zone 1			Zone 2	Zone 3: Forres Town Centre  Zone 3: Other Forres  Other Zone 3			Zone 4: Lossiemouth Town Centre  Lossiemouth OOC + Other Zone 4		Zone 5: Aberlour  Zone 5: Dufftown  Zone 5: Rothes  Other Zone 5				Zone 6: Keith Town Centre  Zone 6: Other Keith  Other Zone 6			Zone 7: Buckie Town Centre  Zone 7: Other Buckie  Zone 7: Cullen  Other Zone 7				Zone 8: Fochlabers Town Centre  Other Zone 8		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total	
Available Expenditure																															
1	£54.5m	50.0%	35.0%	14.0%																									99%	1%	100.0%
2	£32.8m	42.0%	32.0%	10.0%	10.0%	1.0%	1.5%		0.5%	2.0%																			99%	1%	100.0%
3	£41.2m	5.0%				15.0%	60.0%	10.0%	20.0%	25.0%																			90%	10%	100.0%
4	£18.5m	35.0%	17.5%	1.5%			1.0%				15.0%	10.0%	5.0%	6.0%															100%	0%	100.0%
5	£19.0m	20.0%	30.0%	2.0%			1.0%																						94%	6%	100.0%
6	£18.2m	3.0%	3.0%												15.0%	5.0%	1.0%		3.0%	2.0%					1.0%	5%		98%	2%	100.0%	
7	£35.9m	1.0%	3.0%																38.0%	46.0%	5.0%	3.0%						99%	1%	100.0%	
8	£11.9m	22.0%	23.0%	7.0%															7.0%	8.0%			25.0%	8.0%				100%	0%	100.0%	
Total	£231.99m																														
Tourism: Percent of Net Expenditure	£2.13m	25%	45%	3%	5%	3%	10%	0%	5%	10%	5%	2%	1%	2%	1%	5%	0%		4%	5%	1%	1%	4%	5%					100%	0%	100.0%
Inflows - % of turnover from:																															
Aberdeenshire		5%	5%												3%	3%															
Highland		3%	3%			1%	5%					3%							1%	5%	5%										

TABLE 5B: CONVENIENCE EXPENDITURE FLOWS 2021  
EXPENDITURE FLOWS  
2019 Prices  
3

Zone	Total	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		
		Zone 1: Elgin Town Centre				Zone 3: Forres Town Centre			Zone 4: Lossiemouth Town Centre		Zone 5: Aberdeen				Zone 6: Keith Town Centre			Zone 7: Buckie Town Centre				Zone 8: Fochabers Town Centre		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total
		Zone 1: Elgin - Edgar Road			Zone 2	Zone 3: Other Forres			Other Zone 4		Zone 5: Dufftown				Zone 6: Other Keith			Zone 7: Other Buckie				Other Zone 8								
	Available Expenditure			Other Zone 1				Other Zone 3					Other Zone 5																	
1	£54.5m	£27.3m	£19.1m	£7.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£54.0m	£0.5m	£54.5m	
2	£32.8m	£13.8m	£10.5m	£3.3m	£3.3m	£0.3m	£0.5m	£0.0m	£0.2m	£0.7m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£32.5m	£0.3m	£32.8m	
3	£41.2m	£2.1m	£0.0m	£0.0m	£0.0m	£6.2m	£24.7m	£4.1m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£4.1m	£0.0m	£37.0m	£4.1m	£41.2m
4	£18.5m	£6.5m	£3.2m	£0.3m	£0.0m	£0.0m	£0.2m	£0.0m	£3.7m	£4.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£18.5m	£0.0m	£18.5m	
5	£19.0m	£3.8m	£5.7m	£0.4m	£0.0m	£0.0m	£0.2m	£0.0m	£0.0m	£0.0m	£2.8m	£1.9m	£0.9m	£1.1m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£17.8m	£1.1m	£19.0m	
6	£18.2m	£0.5m	£0.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.2m	£0.0m	£0.0m	£2.7m	£12.8m	£0.2m	£0.5m	£0.4m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£17.9m	£0.4m	£18.2m	
7	£35.9m	£0.4m	£1.1m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£1.1m	£0.0m	£13.6m	£16.5m	£1.8m	£1.1m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£35.5m	£0.4m	£35.9m	
8	£11.9m	£2.6m	£2.7m	£0.8m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.8m	£1.0m	£0.0m	£0.0m	£3.0m	£1.0m	£0.0m	£0.0m	£0.0m	£11.9m	£0.0m	£11.9m	
Total	£232.0m	£56.9m	£42.9m	£12.4m	£3.3m	£6.5m	£25.6m	£4.1m	£3.9m	£5.3m	£2.8m	£2.1m	£0.9m	£1.1m	£2.7m	£14.8m	£0.2m	£15.0m	£17.8m	£1.8m	£1.1m	£3.0m	£1.0m	£0.0m	£0.9m	£5.9m	£0.0m	£225.1m	£6.9m	£232.0m
Market Share of Moray Res' Av Exp		25%	18%	5%	1%	3%	11%	2%	2%	2%	1%	1%	0%	0%	1%	6%	0%	6%	8%	1%	0%	1%	0%	0%	0%	3%	0%	97%	3%	100%
Inflows																														
Tourists		£0.53m	£0.37m	£0.05m	£0.11m	£0.05m	£0.16m	£0.00m	£0.11m	£0.11m	£0.11m	£0.04m	£0.02m	£0.04m	£0.02m	£0.09m	£0.00m	£0.07m	£0.10m	£0.02m	£0.02m	£0.07m	£0.03m							£2.13m
Aberdeenshire		£3.09m	£2.33m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.06m	£0.00m	£0.00m	£0.08m	£0.46m	£0.00m	£0.15m	£0.94m	£0.09m	£0.00m	£0.00m	£0.00m							£7.21m
Highland		£1.86m	£1.40m	£0.00m	£0.00m	£0.07m	£1.35m	£0.00m	£0.00m	£0.00m	£0.09m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m							£4.75m
TOTAL TURNOVER OF CENTRE		£62.38m	£46.97m	£12.46m	£3.39m	£6.62m	£27.07m	£4.12m	£3.97m	£5.39m	£3.04m	£2.18m	£0.97m	£1.18m	£2.84m	£15.33m	£0.18m	£15.24m	£18.86m	£1.91m	£1.10m	£3.05m	£0.98m							

TABLE 5C: CONVENIENCE EXPENDITURE FLOWS 2021  
TRADE DRAW TO TOWNS/CENTRES

Zone	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		
	Zone 1: Elgin Town Centre				Zone 3: Forres Town Centre			Zone 4: Lossiemouth Town Centre		Zone 5: Aberdeen				Zone 6: Keith Town Centre			Zone 7: Buckie Town Centre				Zone 8: Fochabers Town Centre		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total
	Zone 1: Elgin -Edgar Road		Other Zone 1	Zone 2	Zone 3: Other Forres		Other Zone 3	Other Zone 4		Zone 5: Dufftown		Zone 5: Rothes	Other Zone 5	Other Zone 6		Other Zone 7													
1	44%	41%	61%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
2	22%	26%	97%	5%	2%	0%	4%	12%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
3	3%	0%	0%	0%	93%	91%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
4	10%	7%	2%	0%	0%	1%	0%	93%	86%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
5	6%	12%	3%	0%	0%	1%	0%	0%	0%	94%	87%	98%	96%	0%	6%	0%	0%	0%	0%	0%	0%								
6	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	8%	0%	0%	96%	83%	100%	4%	2%	0%	0%	0%								
7	1%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	89%	88%	94%	98%	0%	0%							
8	4%	6%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	5%	0%	0%	98%	97%							
External inflows of expenditure from:																													
Tourists	1%	1%	0%	3%	1%	1%	0%	3%	2%	4%	2%	2%	4%	1%	1%	0%	0%	1%	1%	2%	2%	3%							
Aberdeenshire	5%	5%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%	3%	3%	0%	0%	5%	5%	0%	0%	0%							
Highland	3%	3%	0%	0%	1%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
Total Inflows	9%	9%	0%	3%	2%	6%	0%	3%	2%	6%	5%	2%	4%	4%	4%	0%	1%	5%	5%	2%	2%	3%							
Grand Total	£62.38m	£46.97m	£12.46m	£3.39m	£6.62m	£27.07m	£4.12m	£3.97m	£5.39m	£3.04m	£2.18m	£0.97m	£1.18m	£2.84m	£15.33m	£0.18m	£15.24m	£18.86m	£1.91m	£1.10m	£3.05m	£0.98m							
Total Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%						£239.2m		



**TABLE 6A: GENERAL COMPARISON GOODS EXPENDITURE FLOWS 2021  
FLOWS FROM ORIGIN ZONES  
2019 Prices**

Zone		Total			Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals																														
					Zone 1: Elgin Town Centre	Zone 1: Elgin-Edgar Road	Other Zone 1	Zone 2	Zone 3: Forres Town Centre	Zone 3: Other Forres	Other Zone 3	Zone 4: Lossiemouth Town Centre	Lossiemouth OOC + Other Zone 4	Zone 5: Aberlour	Zone 5: Dufftown	Zone 5: Rothes	Other Zone 5	Zone 6: Keith Town Centre	Zone 6: Other Keith	Other Zone 6	Zone 7: Buckie Town Centre	Zone 7: Other Buckie	Zone 7: Cullen	Other Zone 7	Zone 8: Forchabers Town Centre	Other Zone 8	Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total																												
Available Expenditure																																																													
1	£46.7m	50.0%	37.0%	1.5%	2.0%	13.0%	13.0%	12.0%	1.0%	6.0%	1.0%		1.0%	1.0%	1.5%	1.5%	1.0%	5.0%	37.0%		1.0%	10.0%	5.0%	1.0%	4.0%		1.0%	9.0%	0.5%	89.5%	10.5%	100.0%																													
2	£32.4m	40.5%	35.0%																														5.0%	5.0%	2.0%																										
3	£36.8m	20.0%	18.0%																																																										
4	£16.0m	42.5%	38.0%	1.0%																																																									
5	£15.5m	42.0%	27.0%	1.5%																														2.0%																											
6	£14.7m	12.0%	10.0%																																																										
7	£28.0m	19.5%	22.5%																																																										
8	£13.9m	41.0%	33.5%	1.0%																																																									
Total		£203.99m																																																											
Tourism: Percent of Net Expenditure		45%																																																											
£9.91m		10%																																																											
Inflows - % of turnover from:																																																													
Aberdeenshire		6%																																																											
Highland		3%																																																											
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TABLE 6B: GENERAL COMPARISON GOODS EXPENDITURE FLOWS 2021  
EXPENDITURE FLOWS  
2019 Prices  
3

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**TABLE 6C: GENERAL COMPARISON GOODS EXPENDITURE FLOWS 2021  
TRADE DRAW TO TOWNS/CENTRES**

Zone	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		
	Zone 1: Elgin Town Centre			Zone 2	Zone 3: Forres Town Centre			Zone 4: Lossiemouth Town Centre		Zone 5: Aberdeen				Zone 6: Keith Town Centre			Zone 7: Buckie Town Centre				Zone 8: Fochabers Town Centre		Leakage				Totals		
	Zone 1: Elgin: Edgar Road	Other Zone 1			Zone 3: Other Forres	Other Zone 3		Zone 4: Other Zone 4		Zone 5: Dufftown	Zone 5: Rothies	Other Zone 5		Zone 6: Other Keith	Other Zone 6		Zone 7: Other Buckie	Zone 7: Cullen	Other Zone 7	Zone 8: Other Zone 8		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total	
1	29%	28%	32%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
2	16%	18%	0%	100%	0%	23%	18%	40%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
3	9%	11%	0%	0%	86%	68%	50%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
4	8%	10%	7%	0%	0%	2%	60%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
5	8%	7%	10%	0%	0%	4%	0%	0%	0%	17%	39%	100%	100%	3%	11%	0%	0%	0%	0%	0%	0%								
6	2%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	75%	74%	1%	0%	0%	0%	0%	0%								
7	7%	10%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	0%		91%	68%	79%	100%	0%								
8	7%	7%	6%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	10%		0%	24%	0%	0%	43%								
External inflows of expenditure from:																													
Tourists	4%	0%	45%	0%	9%	0%	17%	0%	0%	83%	61%	0%	0%	9%	3%		5%	5%	17%	0%	57%								
Aberdeenshire	6%	4%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	2%			3%	3%	4%	0%	0%								
Highland	3%	3%	0%	0%	5%	5%	8%	0%	0%	0%	0%	0%	0%	0%			0%	0%	0%	0%	0%								
Total Inflows	13%	7%	45%	0%	14%	5%	25%	0%	0%	83%	61%	0%	0%	16%	5%	£0.00m	£10.16m	£4.08m	£1.77m	£0.28m	£1.30m	£0.00m					£201.0m		
Grand Total	£80.48m	£62.30m	£2.22m	£0.65m	£5.53m	£7.06m	£8.89m	£1.61m	£0.16m	£0.90m	£0.40m	£0.23m	£0.23m	£5.49m	£7.29m	£0.00m	£10.16m	£4.08m	£1.77m	£0.28m	£1.30m	£0.00m							
Total Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%								

TABLE 7A: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2021  
FLOWS FROM ORIGIN ZONES  
2019 Prices

Zone	Total	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		
		Zone 1: Elgin Town Centre Zone 1: Elgin :Edgar Road Other Zone 1			Zone 2	Zone 3: Forres Town Centre Zone 3: Other Forres Other Zone 3			Zone 4: Lossiemouth Town Centre Lossiemouth OOC + Other Zone 4	Zone 5: Aberfour Zone 5: Dufftown Zone 5: Rothes Other Zone 5				Zone 6: Keith Town Centre Zone 6: Other Keith Other Zone 6			Zone 7: Buckie Town Centre Zone 7: Other Buckie Zone 7: Cullen Other Zone 7				Zone 8: Fochabers Town Centre Other Zone 8	Aberdeen Aberdeenshire Highland Other	Moray Leakage Total							
Available Expenditure																														
1	£15.6m	23.0%	53.3%	15.0%	2.0%																			3.0%		3.0%	0.7%	93.3%	6.7%	100.0%
2	£8.9m	21.0%	51.3%	15.0%	2.0%																			3.0%		5.0%	0.7%	91.3%	8.7%	100.0%
3	£11.3m	10.0%	28.8%	10.0%		15.0%	15.0%	2.0%																1.0%		17.5%	0.7%	80.8%	19.2%	100.0%
4	£5.3m	19.0%	55.3%	10.0%				2.0%		1.0%														3.0%		9.0%	0.7%	87.3%	12.7%	100.0%
5	£5.5m	24.0%	37.8%	10.0%							1.0%	1.5%	2.0%		9.0%									4.0%		10.0%	0.7%	85.3%	14.7%	100.0%
6	£5.2m	12.5%	54.8%	10.0%											12.5%									7.5%		2.0%	0.7%	89.8%	10.2%	100.0%
7	£10.4m	10.0%	51.3%	10.0%											9.0%									4.0%		2.0%	0.7%	93.3%	6.7%	100.0%
8	£3.2m	14.0%	51.0%	15.0%											9.0%									3.4%		5.0%	0.6%	91.0%	9.0%	100.0%
Total	£65.38m																													
Tourism: Percent of Net Expenditure	£0.00m																													
Inflows - % of turnover from:																														
Aberdeenshire		5%	5%												10.0%	1%														
Highland		3%	3%			3%	3%											3%	3%	3%										

TABLE 7B: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2021  
EXPENDITURE FLOWS  
2019 Prices  
3

Zone	Total	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals			
		Zone 1: Elgin Town Centre Zone 1: Elgin :Edgar Road Other Zone 1			Zone 2	Zone 3: Forres Town Centre Zone 3: Other Forres Other Zone 3			Zone 4: Lossiemouth Town Centre Other Zone 4		Zone 5: Aberlour	Zone 5: Dufftown	Zone 5: Rothes	Other Zone 5	Zone 6: Keith Town Centre	Zone 6: Other Keith	Other Zone 6	Zone 7: Buckie Town Centre	Zone 7: Other Buckie	Zone 7: Cullen	Other Zone 7	Zone 8: Fochabers Town Centre	Other Zone 8	Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total	
Available Expenditure																															
1	£15.6m	£3.6m	£8.3m	£2.3m	£0.3m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.5m	£0.0m	£0.5m	£0.1m	£14.5m	£1.0m	£15.6m	
2	£8.9m	£1.9m	£4.6m	£1.3m	£0.2m	£0.0m	£0.0m	£0.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.3m	£0.0m	£0.4m	£0.1m	£8.2m	£0.8m	£8.9m		
3	£11.3m	£1.1m	£3.3m	£1.1m	£0.0m	£1.7m	£0.0m	£0.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.1m	£0.0m	£2.0m	£0.1m	£9.1m	£2.2m	£11.3m		
4	£5.3m	£1.0m	£2.9m	£0.5m	£0.0m	£0.0m	£0.0m	£0.1m	£0.0m	£0.1m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.2m	£0.0m	£0.5m	£0.0m	£4.7m	£0.7m	£5.3m		
5	£5.5m	£1.3m	£2.1m	£0.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.1m	£0.1m	£0.1m	£0.0m	£0.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.2m	£0.0m	£0.5m	£0.0m	£4.7m	£0.8m	£5.5m		
6	£5.2m	£0.6m	£2.8m	£0.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.4m	£0.0m	£0.1m	£0.0m	£4.6m	£0.5m	£5.2m		
7	£10.4m	£1.0m	£5.3m	£1.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.9m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.4m	£0.0m	£0.2m	£0.1m	£9.7m	£0.7m	£10.4m		
8	£3.2m	£0.4m	£1.6m	£0.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.3m	£0.0m	£0.0m	£0.0m	£0.1m	£0.0m	£0.0m	£0.0m	£0.0m	£0.1m	£0.0m	£0.2m	£0.0m	£2.9m	£0.3m	£3.2m	
Total	£65.4m	£11.0m	£31.0m	£7.9m	£0.5m	£1.7m	£1.7m	£0.5m	£0.0m	£0.1m	£0.1m	£0.1m	£0.0m	£2.4m	£0.0m	£0.0m	£0.0m	£1.4m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£2.1m	£0.0m	£4.4m	£0.4m	£58.4m	£7.0m	£65.3m	
Market Share of Moray Res' Av Exp		17%	47%	12%	1%	3%	3%	1%	0%	0%	0%	0%	0%	4%	0%	0%	0%	2%	0%	0%	0%	0%	0%	3%	0%	7%	1%	89%	11%	100%	
Inflows																															
Tourists		£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m							£0.00m	
Aberdeenshire		£0.60m	£1.68m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.26m	£0.00m	£0.00m	£0.00m	£0.04m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m						£2.59m	
Highland		£0.36m	£1.01m	£0.00m	£0.00m	£0.05m	£0.05m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m						£1.47m	
TOTAL TURNOVER OF CENTRE		£12.01m	£33.65m	£7.92m	£0.49m	£1.75m	£1.75m	£0.51m	£0.00m	£0.05m	£0.05m	£0.08m	£0.11m	£0.00m	£2.62m	£0.00m	£0.00m	£1.43m	£0.03m	£0.00m	£0.00m	£0.00m	£0.00m								
	£0.50m																														

TABLE 7C: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2021  
TRADE DRAW TO TOWNS/CENTRES

Zone	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		
	Zone 1: Elgin Town Centre Zone 1: Elgin :Edgar Road Other Zone 1			Zone 2	Zone 3: Forres Town Centre Zone 3: Other Forres Other Zone 3			Zone 4: Lossiemouth Town Centre Other Zone 4		Zone 5: Aberlour Zone 5: Dufftown Zone 5: Rothes Other Zone 5				Zone 6: Keith Town Centre Zone 6: Other Keith Other Zone 6			Zone 7: Buckie Town Centre Zone 7: Other Buckie Zone 7: Cullen Other Zone 7				Zone 8: Fochabers Town Centre Other Zone 8		Leakage Aberdeen Aberdeenshire Highland Other				Moray Leakage Total		
1	30%	25%	30%	64%	0%	0%	0%	0%	0%	0%	0%	0%		0%			0%	0%											
2	16%	14%	17%	36%	0%	0%	0%	0%	0%	0%	0%	0%		0%			0%	0%											
3	9%	10%	14%	0%	97%	97%	44%	0%	0%	0%	0%	0%		0%			0%	0%											
4	8%	9%	7%	0%	0%	0%	21%	100%	0%	0%	0%	0%		0%			0%	0%											
5	11%	6%	7%	0%	0%	0%	0%	0%	100%	100%	100%			19%			0%	0%											
6	5%	8%	7%	0%	0%	0%	0%	0%	0%	0%	0%			25%			0%	0%											
7	9%	16%	13%	0%	0%	0%	0%	0%	0%	0%	0%			36%			93%	97%											
8	4%	5%	6%	0%	0%	0%	0%	0%	0%	0%	0%			11%			4%	0%											
External inflows of expenditure from:																													
Tourists	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%			0%			0%	0%											
Aberdeenshire	5%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%			10%			3%	3%											
Highland	3%	3%	0%	0%	3%	3%	0%	0%	0%	0%	0%			0%			0%	0%											
Total Inflows	8%	8%	0%	0%	3%	3%	0%	0%	0%	0%	0%	0%	0%	10%	0%	0%	3%	3%	0%	0%	0%	0%							
Grand Total	£12.01m	£33.65m	£7.92m	£0.49m	£1.75m	£1.75m	£0.51m	£0.00m	£0.05m	£0.05m	£0.08m	£0.11m	£0.00m	£2.62m	£0.00m	£0.00m	£1.43m	£0.03m	£0.00m	£0.00m	£0.00m	£0.00m						£62.5m	
Total Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%							

TABLE 8A: CONVENIENCE EXPENDITURE FLOWS 2025  
FLOWS FROM ORIGIN ZONES  
2019 Prices

Zone	Total	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals			
		Zone 1: Elgin Town Centre  Zone 1: Elgin :Edgar Road  Other Zone 1			Zone 2	Zone 3: Forres Town Centre  Zone 3: Other Forres  Other Zone 3			Zone 4: Lossiemouth Town Centre  Lossiemouth OOC + Other Zone 4		Zone 5: Aberlour  Zone 5: Dufftown  Zone 5: Rothies  Other Zone 5				Zone 6: Keith Town Centre  Zone 6: Other Keith  Other Zone 6			Zone 7: Buckie Town Centre  Zone 7: Other Buckie  Zone 7: Cullen  Other Zone 7				Zone 8: Fochlabers Town Centre  Other Zone 8		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total	
1	£54.8m	50.0%	35.0%	14.0%					0.5%	2.0%																		99%	1%	100.0%	
2	£31.6m	42.0%	32.0%	10.0%	10.0%	1.0%	1.5%	10.0%																				99%	1%	100.0%	
3	£40.5m	5.0%				15.0%	60.0%		20.0%	25.0%																		90%	10%	100.0%	
4	£17.7m	35.0%	17.5%	1.5%			1.0%																					100%	0%	100.0%	
5	£18.4m	20.0%	30.0%	2.0%			1.0%				15.0%	10.0%	5.0%	6.0%														94%	6%	100.0%	
6	£17.5m	3.0%	3.0%												15.0%	5.0%	1.0%		3.0%	2.0%					1.0%	5.0%		98%	2%	100.0%	
7	£34.7m	1.0%	3.0%															38.0%	46.0%	5.0%	3.0%							99%	1%	100.0%	
8	£11.8m	22.0%	23.0%	7.0%														7.0%	8.0%			25.0%	8.0%					100%	0%	100.0%	
Total	£227.06m																														
Tourism: Percent of Net Expenditure	£2.24m	25%	45%	18%	3%	5%	10%		10%		10%				5%			10%				5%							100%	0%	100.0%
Inflows - % of turnover from:		25%	18%		5%	3%	8%	0%	5%	5%	5%	2%	1%	2%	1%	4%	0%	4%	5%	1%	1%	4%	2%					100%	0%	100.0%	
Aberdeenshire		5%	5%												3%	3%															
Highland		3%	3%			1%	5%				3%	3%						1%	5%	5%											

TABLE 8B: CONVENIENCE EXPENDITURE FLOWS 2025  
EXPENDITURE FLOWS  
2019 Prices  
3

Zone	Total	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals			
		Zone 1: Elgin Town Centre Zone 1: Elgin :Edgar Road Other Zone 1			Zone 2	Zone 3: Forres Town Centre Zone 3: Other Forres Other Zone 3			Zone 4: Lossiemouth Town Centre Other Zone 4		Zone 5: Aberlour Zone 5: Dufftown Zone 5: Rothies Other Zone 5				Zone 6: Keith Town Centre Zone 6: Other Keith Other Zone 6			Zone 7: Buckie Town Centre Zone 7: Other Buckie Zone 7: Cullen Other Zone 7				Zone 8: Fochabers Town Centre Other Zone 8		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total	
Available Expenditure																															
1	£54.8m	£27.4m	£19.2m	£7.7m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.5m	£0.0m	£54.3m	£0.5m	£54.8m
2	£31.6m	£13.3m	£10.1m	£3.2m	£3.2m	£0.3m	£0.5m	£0.0m	£0.2m	£0.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.3m	£0.0m	£31.3m	£0.3m	£31.6m
3	£40.5m	£2.0m	£0.0m	£0.0m	£0.0m	£6.1m	£24.3m	£4.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£4.0m	£0.0m	£36.4m	£4.0m	£40.5m
4	£17.7m	£6.2m	£3.1m	£0.3m	£0.0m	£0.0m	£0.2m	£0.0m	£3.5m	£4.4m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£17.7m	£0.0m	£17.7m
5	£18.4m	£3.7m	£5.5m	£0.4m	£0.0m	£0.0m	£0.2m	£0.0m	£0.0m	£0.0m	£2.8m	£1.8m	£0.9m	£1.1m	£0.0m	£0.9m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.2m	£0.9m	£0.0m	£17.3m	£1.1m	£18.4m
6	£17.5m	£0.5m	£0.5m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.2m	£0.0m	£0.0m	£2.6m	£12.2m	£0.2m	£0.5m	£0.3m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.3m	£0.0m	£0.0m	£17.1m	£0.3m	£17.5m
7	£34.7m	£0.3m	£1.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£1.0m	£0.0m	£13.2m	£16.0m	£1.7m	£1.0m	£0.0m	£0.0m	£0.0m	£0.3m	£0.0m	£0.0m	£0.0m	£34.4m	£0.3m	£34.7m
8	£11.8m	£2.6m	£2.7m	£0.8m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.8m	£0.9m	£0.0m	£0.0m	£3.0m	£0.9m	£0.0m	£0.0m	£0.0m	£0.0m	£11.8m	£0.0m	£11.8m	
Total	£227.1m	£56.1m	£42.2m	£12.3m	£3.2m	£6.4m	£25.1m	£4.0m	£3.7m	£5.1m	£2.8m	£2.0m	£0.9m	£1.1m	£2.6m	£14.2m	£0.2m	£14.5m	£17.3m	£1.7m	£1.0m	£3.0m	£0.9m	£0.0m	£0.9m	£5.8m	£0.0m	£220.3m	£6.7m	£227.1m	
Market Share of Moray Res' Av Exp		25%	19%	5%	1%	3%	11%	2%	2%	2%	1%	1%	0%	0%	1%	6%	0%	6%	8%	1%	0%	1%	0%	0%	0%	3%	0%	97%	3%	100%	
Inflows																															
Tourists		£0.56m	£0.39m	£0.06m	£0.11m	£0.06m	£0.17m	£0.00m	£0.11m	£0.11m	£0.11m	£0.04m	£0.02m	£0.04m	£0.02m	£0.09m	£0.00m	£0.08m	£0.10m	£0.02m	£0.02m	£0.08m	£0.03m							£2.24m	
Aberdeenshire		£3.05m	£2.29m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.06m	£0.00m	£0.00m	£0.08m	£0.44m	£0.00m	£0.15m	£0.91m	£0.09m	£0.00m	£0.00m	£0.00m							£7.07m	
Highland		£1.83m	£1.38m	£0.00m	£0.00m	£0.06m	£1.32m	£0.00m	£0.00m	£0.00m	£0.09m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m							£4.68m	
TOTAL TURNOVER OF CENTRE		£61.50m	£46.27m	£12.35m	£3.27m	£6.51m	£26.62m	£4.05m	£3.82m	£5.18m	£2.96m	£2.12m	£0.94m	£1.15m	£2.73m	£14.73m	£0.17m	£14.77m	£18.27m	£1.85m	£1.06m	£3.03m	£0.98m								

TABLE 8C: CONVENIENCE EXPENDITURE FLOWS 2025  
TRADE DRAW TO TOWNS/CENTRES

Zone	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		
	Zone 1: Elgin Town Centre Zone 1: Elgin -Edgar Road Other Zone 1			Zone 2	Zone 3: Forres Town Centre Zone 3: Other Forres Other Zone 3			Zone 4: Lossiemouth Town Centre Other Zone 4		Zone 5: Aberlour Zone 5: Dufftown Zone 5: Rothies Other Zone 5				Zone 6: Keith Town Centre Zone 6: Other Keith Other Zone 6			Zone 7: Buckie Town Centre Zone 7: Other Buckie Zone 7: Cullen Other Zone 7				Zone 8: Fochabers Town Centre Other Zone 8		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total
1	45%	41%	62%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
2	22%	22%	26%	97%	5%	2%	0%	4%	12%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
3	3%	0%	0%	0%	93%	91%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
4	10%	7%	2%	0%	0%	1%	0%	93%	86%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
5	6%	12%	3%	0%	0%	1%	0%	0%	0%	93%	87%	98%	96%	0%	6%	0%	0%	0%	0%	0%	0%	0%							
6	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	8%	0%	0%	96%	83%	100%	4%	2%	0%	0%	0%	0%							
7	1%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	89%	87%	94%	98%	0%	0%							
8	4%	6%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	6%	5%	0%	0%	97%	97%							
External inflows of expenditure from:																													
Tourists	1%	1%	0%	3%	1%	1%	0%	3%	2%	4%	2%	2%	4%	1%	1%	0%	1%	1%	1%	2%	3%	3%							
Aberdeenshire	5%	5%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%	3%	3%	0%	5%	5%	0%	0%	0%	0%							
Highland	3%	3%	0%	0%	1%	5%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
Total Inflows	9%	9%	0%	3%	2%	6%	0%	3%	2%	7%	5%	2%	4%	4%	4%	0%	2%	6%	6%	2%	3%	3%							
Grand Total	£61.50m	£46.27m	£12.35m	£3.27m	£6.51m	£26.62m	£4.05m	£3.82m	£5.18m	£2.96m	£2.12m	£0.94m	£1.15m	£2.73m	£14.73m	£0.17m	£14.77m	£18.27m	£1.85m	£1.06m	£3.03m	£0.98m							
Total Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%							

TABLE 9A: GENERAL COMPARISON GOODS EXPENDITURE FLOWS 2025  
FLOWS FROM ORIGIN ZONES  
2019 Prices

Zone		Total			Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals						
					Zone 1: Elgin Town Centre			Other Zone 1	Zone 2	Zone 3: Forres Town Centre			Zone 4: Lossiemouth Town Centre	Lossiemouth OOC + Other Zone 4	Zone 5: Aberdeen				Zone 6: Keith Town Centre			Zone 7: Buckie Town Centre				Zone 8: Fochabers Town Centre	Other Zone 8	Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total			
Available Expenditure																																					
1	£53.6m	48.0%	35.5%	1.5%	2.0%	13.0%	5.0%	1.0%	2.0%	1.0%	1.0%	1.5%	1.5%	1.0%	5.0%	28.0%	37.0%	1.0%	10.0%	5.0%	1.0%	4.0%	1.3%	11.9%	0.7%	86.1%	13.9%	100.0%									
2	£35.5m	38.9%	33.6%																																		
3	£41.2m	19.2%	17.3%																																		
4	£17.5m	40.8%	36.5%	1.0%																																	
5	£17.2m	40.3%	25.9%	1.5%			2.0%																														
6	£16.0m	11.5%	9.6%																																		
7	£30.8m	18.7%	21.6%																																		
8	£15.7m	39.4%	32.2%	1.0%																																	
Total		£227.65m																																			
Tourism: Percent of Net Expenditure		45%				20%					10%				8%			10%				8%						100.0%	0.0%	100.0%							
£10.82m		35%			10%		5%	15%			8%				3%			5%		3%			8%						100.0%	0.0%	100.0%						
Inflows - % of turnover from:																																					
Aberdeenshire		6%				4%									7.5%			2%		3%																	
Highland		3%				3%												3%						5%													

TABLE 9B: GENERAL COMPARISON GOODS EXPENDITURE FLOWS 2025  
EXPENDITURE FLOWS  
2019 Prices  
3

Zone		Total			Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																												
		Zone 1: Elgin Town Centre			Zone 1: Elgin :Edgar Road			Other Zone 1	Zone 2	Zone 3: Forres Town Centre			Zone 3: Other Forres			Other Zone 3	Zone 4: Lossiemouth Town Centre			Other Zone 4			Zone 5: Aberfour	Zone 5: Dufftown	Zone 5: Rothas	Other Zone 5	Zone 6: Keith Town Centre			Zone 6: Other Keith			Other Zone 6	Zone 7: Buckie Town Centre			Zone 7: Other Buckie			Zone 7: Cullen	Other Zone 7	Zone 8: Fochabers Town Centre			Other Zone 8			Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																					
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**TABLE 10A: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2025**  
**FLOWS FROM ORIGIN ZONES**  
**2019 Prices**

[illegible]

**TABLE 10B: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2025**  
**EXPENDITURE FLOWS**  
**2019 Prices**  
**3**

[illegible]

**TABLE 10C: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2025  
TRADE DRAW TO TOWNS/CENTRES**

Zone	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		
	Zone 1: Elgin Town Centre			Zone 2	Zone 3: Forbes Town Centre			Zone 4: Lossiemouth Town Centre	Zone 5				Zone 6			Zone 7				Zone 8: Fochabers Town Centre		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total	
	Zone 1: Elgin	Zone 1: Edgar Road	Other Zone 1	Zone 2	Zone 3: Forbes	Zone 3: Other Forbes	Other Zone 3	Other Zone 4	Zone 5: Aberlour	Zone 5: Dufftown	Zone 5: Rothes	Other Zone 5	Zone 6: Keith Town Centre	Zone 6: Other Keith	Other Zone 6	Zone 7: Buckie Town Centre	Zone 7: Other Buckie	Zone 7: Cullen	Other Zone 7	Other Zone 8									
1	31%	25%	30%	65%	0%	0%	0%	0%	0%	0%	0%		0%			0%	0%												
2	15%	13%	17%	0%	0%	0%	35%	0%	0%	0%	0%		0%			0%	0%												
3	9%	10%	14%	0%	97%	97%	45%	0%	0%	0%	0%		0%			0%	0%												
4	8%	9%	7%	0%	0%	0%	21%	100%	0%	0%	0%		0%			0%	0%												
5	11%	6%	7%	0%	0%	0%	0%	0%	100%	100%	100%		19%			0%	0%												
6	5%	8%	6%	0%	0%	0%	0%	0%	0%	0%	0%		24%			0%	0%												
7	9%	16%	13%	0%	0%	0%	0%	0%	0%	0%	0%		36%			92%	97%												
8	4%	5%	6%	0%	0%	0%	0%	0%	0%	0%	0%		11%			5%	0%												
External inflows of expenditure from:																													
Tourists	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%		0%			0%	0%												
Aberdeenshire	5%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%		10%			0%	3%												
Highland	3%	3%	0%	0%	3%	3%	0%	0%	0%	0%	0%		0%			0%	0%												
Total Inflows	8%	8%	0%	0%	3%	3%	0%	0%	0%	0%	0%	0%	10%	0%	0%	3%	3%	0%	0%	0%	0%								
Grand Total	£13.16m	£36.79m	£8.86m	£0.55m	£1.96m	£1.96m	£0.57m	£0.00m	£0.06m	£0.06m	£0.09m	£0.12m	£0.00m	£2.90m	£0.00m	£0.00m	£1.58m	£0.03m	£0.00m	£0.00m	£0.00m	£0.00m							
Total Percent	100%	100%	100%	100%	100%	100%	100%		100%	100%	100%	100%		100%			100%	100%	100%	100%	100%						£68.7m		

TABLE 11A: CONVENIENCE EXPENDITURE FLOWS 2030  
FLOWS FROM ORIGIN ZONES  
2019 Prices

Zone	Total	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals			
		Zone 1: Elgin Town Centre  Zone 1: Elgin :Edgar Road  Other Zone 1			Zone 2	Zone 3: Forres Town Centre  Zone 3: Other Forres  Other Zone 3			Zone 4: Lossiemouth Town Centre  Lossiemouth OOC + Other Zone 4		Zone 5: Aberlour  Zone 5: Dufftown  Zone 5: Rothes  Other Zone 5				Zone 6: Keith Town Centre  Zone 6: Other Keith  Other Zone 6			Zone 7: Buckie Town Centre  Zone 7: Other Buckie  Zone 7: Cullen  Other Zone 7				Zone 8: Fochabers Town Centre  Other Zone 8		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total	
Available Expenditure																															
1	£55.2m	50.0%	35.0%	14.0%					0.5%	2.0%																		99%	1%	100.0%	
2	£30.5m	42.0%	32.0%	10.0%	10.0%	1.0%	1.5%																					99%	1%	100.0%	
3	£41.6m	5.0%				15.0%	60.0%	10.0%																				90%	10%	100.0%	
4	£17.5m	35.0%	17.5%	1.5%			1.0%		20.0%	25.0%																		100%	0%	100.0%	
5	£18.0m	20.0%	30.0%	2.0%			1.0%				15.0%	10.0%	5.0%	6.0%														94%	6%	100.0%	
6	£16.8m	3.0%	3.0%									1.0%	5.0%												1.0%	5.0%		98%	2%	100.0%	
7	£34.5m	1.0%	3.0%												15.0%	5.0%	3.0%		3.0%	2.0%	5.0%	3.0%						99%	1%	100.0%	
8	£11.5m	22.0%	23.0%	7.0%														7.0%	8.0%			25.0%	8.0%					100%	0%	100.0%	
Total		£225.69m																													
Tourism: Percent of Net Expenditure		£2.37m																													
		25%	45%	3%	5%	3%	10%	0%	5%	5%	5%	2%	1%	2%	1%	5%	0%		4%	5%	1%	1%	4%	5%				100%	0%	100.0%	
Inflows - % of turnover from:																															
Aberdeenshire		5%	5%												3%	3%			1%	5%	5%										
Highland		3%	3%			1%	5%				3%	3%																			

TABLE 11B: CONVENIENCE EXPENDITURE FLOWS 2030  
EXPENDITURE FLOWS  
2019 Prices  
3

Zone		Total			Zone 1		Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		

TABLE 11C: CONVENIENCE EXPENDITURE FLOWS 2030  
TRADE DRAW TO TOWNS/CENTRES

Zone	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		
	Zone 1: Elgin Town Centre			Zone 2	Zone 3: Forres Town Centre			Zone 4: Lossiemouth Town Centre		Zone 5: Aberdeen				Zone 6: Keith Town Centre			Zone 7: Buckie Town Centre				Zone 8: Fochabers Town Centre		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total
	Zone 1: Elgin :Edgar Road	Other Zone 1			Zone 3: Other Forres	Other Zone 3		Other Zone 4		Zone 5: Dufftown	Zone 5: Rothes	Other Zone 5		Zone 6: Other Keith	Other Zone 6		Zone 7: Cullen	Other Zone 7		Other Zone 8									
1	45%	42%	63%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
2	21%	21%	25%	96%	5%	2%	0%	4%	12%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
3	3%	0%	0%	0%	94%	91%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
4	10%	7%	2%	0%	0%	1%	0%	93%	86%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%								
5	6%	12%	3%	0%	0%	1%	0%	0%	0%	93%	87%	97%	96%	0%	6%	0%	0%	0%	0%	0%	0%								
6	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	8%	0%	0%	96%	83%	100%	3%	2%	0%	0%	0%								
7	1%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	90%	88%	94%	98%	0%	0%							
8	4%	6%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	5%	0%	0%	97%	96%							
External inflows of expenditure from:																													
Tourists	1%	1%	0%	4%	1%	1%	0%	3%	2%	4%	2%	3%	4%	1%	1%	0%	1%	1%	1%	2%	3%	4%							
Aberdeenshire	5%	5%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%	3%	3%	0%	1%	5%	5%	0%	0%	0%							
Highland	3%	3%	0%	0%	1%	5%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
Total Inflows	9%	9%	0%	4%	2%	6%	0%	3%	2%	7%	5%	3%	4%	4%	4%	0%	2%	6%	6%	2%	3%	4%							
Grand Total	£61.05m	£45.79m	£12.27m	£3.17m	£6.66m	£27.28m	£4.16m	£3.77m	£5.11m	£2.90m	£2.07m	£0.92m	£1.13m	£2.63m	£14.24m	£0.17m	£14.67m	£18.16m	£1.84m	£1.06m	£2.96m	£0.96m					£232.97m		
Total Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%								

TABLE 12A: GENERAL COMPARISON GOODS EXPENDITURE FLOWS 2030  
FLOWS FROM ORIGIN ZONES  
2019 Prices

Zone		Total			Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		
					Zone 1: Elgin Town Centre			Zone 2	Zone 3: Forres Town Centre			Zone 4: Lossiemouth Town Centre		Zone 5: Dufftown				Zone 6: Keith Town Centre			Zone 7: Buckie Town Centre				Zone 8: Fochabers Town Centre		Leakage						
					Zone 1: Elgin :Edgar Road				Zone 3: Other Forres			Lossiemouth OOC + Other Zone 4		Zone 5: Other Zone 5				Zone 6: Other Keith			Zone 7: Other Buckie				Other Zone 8		Aberdeen				Moray		
Available Expenditure					Other Zone 1				Other Zone 3			Other Zone 4		Other Zone 5				Other Zone 6			Other Zone 7				Other Zone 8		Aberdeenshire				Leakage		
1	£60.4m	45.7%	33.8%	1.5%	2.0%	13.0%	5.0%	1.0%	2.0%	1.0%	1.0%	1.5%	1.5%	1.0%	5.0%	1.0%	10.0%	5.0%	1.0%	4.0%	1.7%	15.4%	0.9%	82.0%	18.0%	100.0%							
2	£38.5m	37.0%	32.0%	1.6%																							14.6%	0.8%	83.0%	17.0%	100.0%		
3	£47.4m	18.3%	16.4%	1.1%	25.6%	0.6%	72.7%	27.3%	100.0%																								
4	£19.4m	38.8%	34.7%	1.0%	1.7%	15.0%	0.8%	82.5%	17.5%	100.0%																							
5	£18.8m	38.4%	24.7%	1.5%	5.4%	16.3%	0.7%	77.5%	22.5%	100.0%																							
6	£17.3m	11.0%	9.1%	1.0%	8.7%	4.6%	0.6%	86.1%	13.9%	100.0%																							
7	£34.4m	17.8%	20.6%	1.0%	7.3%	3.6%	0.7%	88.4%	11.6%	100.0%																							
8	£17.1m	37.5%	30.6%	1.0%	4.5%	9.0%	0.9%	85.6%	14.4%	100.0%																							
Total		£253.11m																															
Tourism: Percent of Net Expenditure		45%			20%						10%				8%			10%				8%						100.0%					
£12.08m		35%			10%			5%			15%			8%				3%			2%				8%						0.0%		
Inflows - % of turnover from:																																	
Aberdeenshire		6%			4%			5%			10%			7.5%				2%			3%												
Highland		3%			3%																												

TABLE 12B: GENERAL COMPARISON GOODS EXPENDITURE FLOWS 2030  
EXPENDITURE FLOWS  
2019 Prices  
3

Zone		Total			Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																												
		Zone 1: Elgin Town Centre			Zone 1: Elgin :Edgar Road			Other Zone 1	Zone 2	Zone 3: Forres Town Centre			Zone 3: Other Forres			Other Zone 3	Zone 4: Lossiemouth Town Centre		Other Zone 4		Zone 5: Aberlour	Zone 5: Dufftown		Zone 5: Rothas	Other Zone 5	Zone 6: Keith Town Centre		Zone 6: Other Keith		Other Zone 6	Zone 7: Buckie Town Centre		Zone 7: Other Buckie		Zone 7: Cullen	Other Zone 7	Zone 8: Fochabers Town Centre		Other Zone 8		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																												
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1		£60.4m			£27.6m			£20.4m			£0.9m			£0.0m			£0.0m			£0.0m			£0.6m			£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m		£0.0m	

**TABLE 13A: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2030**  
**FLOWS FROM ORIGIN ZONES**  
**2019 Prices**

[illegible]

**TABLE 13B: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2030**  
**EXPENDITURE FLOWS**  
 2019 Prices  
 3

Zone			Total			Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		

**TABLE 13C: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2030  
TRADE DRAW TO TOWNS/CENTRES**

[illegible]



**TABLE 14A: CONVENIENCE EXPENDITURE FLOWS 2035**  
**FLOWS FROM ORIGIN ZONES**  
**2019 Prices**

[illegible]

**TABLE 14B: CONVENIENCE EXPENDITURE FLOWS 2035**  
**EXPENDITURE FLOWS**  
**2019 Prices**  
**3**

[illegible]

**TABLE 14C: CONVENIENCE EXPENDITURE FLOWS 2035**  
**TRADE DRAW TO TOWNS/CENTRES**

Zone	Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		
	Zone 1: Elgin Town Centre			Zone 2	Zone 3: Forbes Town Centre			Zone 4: Lossiemouth Town Centre		Zone 5: Aberlour Dufftown  Rothies  Other Zone 5				Zone 6: Keith Town Centre  Other Keith  Other Zone 6			Zone 7: Buckie Town Centre  Other Buckle  Cullen  Other Zone 7				Zone 8: Fochabers Town Centre  Other Zone 8		Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total
1	46%	43%	64%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
2	20%	21%	24%	96%	4%	2%	0%	4%	12%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
3	3%	0%	0%	0%	94%	91%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
4	10%	7%	2%	0%	0%	1%	0%	93%	86%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
5	6%	12%	3%	0%	0%	1%	0%	0%	0%	93%	87%	97%	95%	0%	6%	0%	0%	0%	0%	0%	0%	0%							
6	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	8%	0%	0%	96%	82%	100%	3%	2%	0%	0%	0%	0%							
7	1%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	90%	88%	94%	98%	0%	0%							
8	4%	6%	6%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	5%	0%	0%	97%	96%							
External inflows of expenditure from:																													
Tourists	1%	1%	1%	4%	1%	1%	0%	3%	3%	4%	2%	3%	5%	1%	1%	0%	1%	1%	1%	2%	3%	4%							
Aberdeenshire	5%	5%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%	3%	3%	0%	1%	5%	5%	0%	0%	0%							
Highland	3%	3%	0%	0%	1%	5%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%							
Total Inflows	9%	9%	1%	4%	2%	6%	0%	3%	3%	7%	5%	3%	5%	4%	8%	0%	2%	6%	6%	2%	3%	4%							
Grand Total	£61.01m	£45.62m	£12.31m	£3.09m	£6.76m	£27.68m	£4.22m	£3.72m	£5.03m	£2.83m	£2.02m	£0.90m	£1.10m	£2.54m	£13.81m	£0.16m	£14.55m	£18.02m	£1.83m	£1.05m	£2.90m	£0.94m							
Total Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%							£232.1m

**TABLE 15A: GENERAL COMPARISON GOODS EXPENDITURE FLOWS 2035**  
**FLOWS FROM ORIGIN ZONES**  
**2019 Prices**

[illegible]

**TABLE 15B: GENERAL COMPARISON GOODS EXPENDITURE FLOWS 2035**  
**EXPENDITURE FLOWS**  
**2019 Prices**  
**3**

Zone		Total			Zone 1			Zone 2	Zone 3			Zone 4		Zone 5				Zone 6			Zone 7				Zone 8:		Leakage				Totals		

**TABLE 15C: GENERAL COMPARISON GOODS EXPENDITURE FLOWS 2035  
TRADE DRAW TO TOWNS/CENTRES**

[illegible]

**TABLE 16A: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2035**  
**FLOWS FROM ORIGIN ZONES**  
**2019 Prices**

[illegible]

**TABLE 16B: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2035**  
**EXPENDITURE FLOWS**  
**2019 Prices**  
**3**

[illegible]

**TABLE 16C: BULKY COMPARISON GOODS EXPENDITURE FLOWS 2035  
TRADE DRAW TO TOWNS/CENTRES**

[illegible]

TABLE 17: EXISTING FLOORSPACE AND TURNOVER 2021  
2019 Prices

		No.	GFA Sq M	NFA Sq M	Convenience Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m	GFA Sq M	NFA Sq M	General Comparison Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m	GFA Sq M	NFA Sq M	Bulky Goods Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m	GFA Sq M	NFA Sq M	All Goods Total Turnover £m	
ZONE 1: ELGIN																					
1.1 Elgin City Centre																					
Convenience	Tesco	1	4944	3155	£12,143 psm	89%	£38.31m	3955	2524	£8,040 psm	90%	£20.29m	989	631	£6,185 psm	107%	£3.90m	9888	6310	£62.51m	
	Aldi	1	978	685	£11,034 psm	89%	£7.56m	173	121	£11,240 psm	90%	£1.36m						1151	806	£8.91m	
	M&S Foodhall	1	1481	889	£8,105 psm	89%	£7.20m	78	47	£5,367 psm	90%	£0.25m						1559	935	£7.45m	
	Farmfoods	1	815	611	£4,754 psm	89%	£2.90m											815	611	£2.90m	
	Remainder	12	2076	1245	£5,141 psm	89%	£6.40m											2076	1245	£6.40m	
	Total Conv	16	10293	6585			£62.38m	4206	2692			£21.90m	989	631			£3.90m	15488	9907	£88.18m	
General Comparison		73					19689	11814	£4,959 psm	90%	£58.58m						19689	11814	£58.58m		
Bulky Goods		9										3454	2763	£2,934 psm	107%	£8.11m	3454	2763	£8.11m		
Services		142															17460				
Vacant		32															6546				
TOTAL		272	10293	6585			£62.38m	23895	14505			£80.48m	4443	3394			£12.01m	62637	24484	£154.87m	
1.2 Edgar Road Area																					
Convenience	ASDA	1	5399	2969	£12,644 psm	97%	£37.54m	4319	2375	£11,619 psm	135%	£27.60m	1080	594	£7,086 psm	127%	£4.21m	10798	5939	£69.35m	
	Food Warehouse	1	948	759	£6,929 psm	97%	£5.26m											948	759	£5.26m	
	Other	1	678	542	£4,356 psm	97%	£2.36m											678	542	£2.36m	
General Comparison		3	7025	4270			£45.16m	4319	2375			£27.60m	1080	594			£4.21m	12424	7239	£76.97m	
	Next	1						794	595	£3,955 psm	135%	£2.36m						794	595	£2.36m	
	Matalan	1						1946	1459	£2,433 psm	135%	£3.55m						1946	1459	£3.55m	
General Comparison	Home Bargains	1	338	254	£7,154 psm	97%	£1.81m	789	592	£10,012 psm	135%	£5.92m						1127	845	£7.74m	
	New Look	1						804	603	£3,888 psm	135%	£2.34m						804	603	£2.34m	
	Boots	1						651	488	£8,128 psm	135%	£3.97m						651	488	£3.97m	
	JD Sports	1						581	436	£8,118 psm	135%	£3.54m						581	436	£3.54m	
	B&M	1						2474	1855	£4,858 psm	135%	£9.01m						2474	1855	£9.01m	
	Sports Direct	1						909	682	£5,890 psm	135%	£4.01m						909	682	£4.01m	
	Total G Comp	8	338	254			£1.81m	8946	6710			£34.70m	4238	3178	£1,889 psm	127%	£6.00m	9285	6963	£36.52m	
	Bulky Goods	B&Q	1										4238	3178	£1,889 psm	127%	£6.00m	4238	3178	£6.00m	
	Dreams	1											529	397	£1,889 psm	127%	£0.75m	529	397	£0.75m	
	Pets @Home	1											717	538	£1,603 psm	127%	£0.86m	717	538	£0.86m	
Carpetright	1											637	478	£3,218 psm	127%	£1.54m	637	478	£1.54m		
General Comparison	Tapi	1											875	656	£1,389 psm	127%	£0.91m	875	656	£0.91m	
	Currys	1											1406	1055	£13,703 psm	127%	£14.45m	1406	1055	£14.45m	
	Bensons	1											479	359	£13,703 psm	127%	£4.92m	479	359	£4.92m	
	Total BG	7											8881	6661			£29.44m	8881	6661	£29.44m	
	Services	2																706			
	Vacant	4																2533			
	TOTAL EDGAR ROAD AREA		24	7363	4524			£46.97m	13266	9085			£62.30m	9961	7255			£33.65m	33828	20864	£142.92m
	1.3 Local Centres/Parades																				
	Bishopmill	Convenience	1	274	178	£8,550 psm	88%	£1.52m											274	178	£1.52m
		General Comparison	2						254	165	£1,906 psm	85%	£0.31m						254	165	£0.31m
Bulky Goods		7																628			
TOTAL		10	274	178			£1.52m	254	165			£0.31m						1156	343	£1.84m	
Glen Moray Drive																					
Convenience	Gen Comp	1	263	171	£3,305 psm	88%	£0.56m											263	171	£0.56m	
	Bulky Goods	1											62	40	£1,253 psm	100%	£0.05m	62	40	£0.05m	
	Services	3																176			
	Vacant	3																237			
TOTAL		5	263	171			£0.56m						62	40			£0.05m	738	211	£0.61m	
Hermes Road																					
Convenience	Gen Comp	1																40	26	£0.03m	
	Bulky Goods	1											40	26	£1,253 psm	100%	£0.03m	40	26	£0.03m	
	Services	3																234			
TOTAL		4											40	26			£0.03m	274	26	£0.03m	
New Elgin																					
Convenience	Gen Comp	1	47	30	£3,305 psm	88%	£0.10m											47	30	£0.10m	
	Bulky Goods	6																289			
	Services	4																159			
	Vacant	11	47	30			£0.10m											494	30	£0.10m	
TOTAL		11	47	30			£0.10m														
Southfield Drive																					
Convenience	Scotmid	1	383	249	£8,550 psm	88%	£2.13m											383	249	£2.13m	
	Gen Comp	1	112	73	£3,305 psm	88%	£0.24m											112	73	£0.24m	
	Bulky Goods	2						218	142	£1,906 psm	85%	£0.27m						218	142	£0.27m	
	Services	2											422	274	£1,253 psm	100%	£0.34m	422	274	£0.34m	
TOTAL		8	495	321			£2.37m	218	142			£0.27m	422	274			£0.34m	1436	737	£2.98m	
1.4 Remainder Elgin																					
Convenience	Lidl	1	1412	1093	£6,522 psm	88%	£7.13m	249	193	£6,335 psm	85%	£1.22m						1661	1286	£8.35m	
	Others	4	361	235	£3,305 psm	88%	£0.78m														



ZONE 4: LOSSIEMOUTH																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																			
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**TABLE 18: FLOORSPACE AND TURNOVER 2025**  
**2019 Prices**

	No.	GFA Sq M	NFA Sq M	Convenience			General Comparison					GFA Sq M	NFA Sq M	Bulkly Goods			GFA Sq M	NFA Sq M	All Goods		
				Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m			Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m			Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m			Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m
ZONE 1: ELGIN																					
1.1 Elgin City Centre																					
Convenience	Tesco	1	4944	3155	£11,973 psm	90%	£37.77m	3955	2524	£8,654 psm	95%	£21.84m	989	631	£6,777 psm	115%	£4.28m	9888	6310	£63.89m	
	Aldi	1	978	685	£10,880 psm	90%	£7.45m	173	121	£12,098 psm	95%	£1.46m						1151	806	£8.91m	
	M&S Foodhall	1	1481	889	£7,991 psm	90%	£7.10m	78	47	£5,776 psm	95%	£0.27m						1559	935	£7.37m	
	Farmfoods	1	815	611	£4,688 psm	90%	£2.86m											815	611	£2.86m	
	Remainder	12	2076	1245	£5,069 psm	90%	£8.31m											2076	1245	£6.31m	
	Total Conv	16	10293	6585			£61.50m	4206	2692			£23.57m	989	631			£4.28m	15488	9907	£89.35m	
General Comparison		73						19689	11814	£5,337 psm	95%	£63.05m	3454	2763	£3,215 psm	115%	£8.88m	19689	11814	£63.05m	
Bulky Goods		9																3454	2763	£8.88m	
Services		142																17460			
Vacant		32																6546			
TOTAL		272	10293	6585			£61.50m	23895	14505			£86.62m	4443	3394			£13.16m	62637	24484	£161.28m	
1.2 Edgar Road Area																					
Convenience	ASDA	1	5399	2969	£12,431 psm	98%	£36.91m	4319	2375	£12,479 psm	143%	£29.64m	1080	594	£7,748 psm	136%	£4.60m	10798	5399	£71.16m	
	Food Warehouse	1	948	759	£6,812 psm	98%	£5.17m											948	759	£5.17m	
	Other	1	678	542	£4,283 psm	98%	£2.32m											678	542	£2.32m	
		3	7025	4270			£44.40m	4319	2375			£29.64m	1080	594			£4.60m	12424	7239	£78.65m	
General Comparison	Next	1						794	595	£4,248 psm	143%	£2.53m						794	595	£2.53m	
	Matalan	1						1946	1459	£2,613 psm	143%	£3.81m						1946	1459	£3.81m	
	Home Bargains	1	338	254	£7,363 psm	98%	£1.87m	789	592	£10,753 psm	143%	£6.36m						1127	845	£8.23m	
	New Look	1						804	603	£4,176 psm	143%	£2.52m						804	603	£2.52m	
	Boots	1						651	488	£8,729 psm	143%	£4.26m						651	488	£4.26m	
	JD Sports	1						581	436	£8,719 psm	143%	£3.80m						581	436	£3.80m	
	B&M	1						2474	1855	£5,217 psm	143%	£9.68m						2474	1855	£9.68m	
	Sports Direct	1						909	682	£6,326 psm	143%	£4.31m						909	682	£4.31m	
	Total G Comp	8	338	254			£1.87m	8946	6710			£37.27m						9285	6963	£39.14m	
Bulky Goods	B&Q	1											4238	3178	£2,065 psm	136%	£6.56m	4238	3178	£6.56m	
	Dreams	1											529	397	£2,065 psm	136%	£0.82m	529	397	£0.82m	
	Pets @Home	1											717	538	£1,752 psm	136%	£0.94m	717	538	£0.94m	
	Carpetright	1											637	478	£3,519 psm	136%	£1.68m	637	478	£1.68m	
	Tapi	1											875	656	£1,519 psm	136%	£1.00m	875	656	£1.00m	
	Currys	1											1406	1055	£14,983 psm	136%	£15.80m	1406	1055	£15.80m	
	Bensons	1											479	359	£14,983 psm	136%	£5.38m	479	359	£5.38m	
	Total BG	7											8881	6661			£32.19m	8881	6661	£32.19m	
Services		2																706			
Vacant		4																2533			
TOTAL EDGAR ROAD AREA		24	7363	4524			£46.27m	13266	9085			£66.92m	9961	7255	£0 psm		£36.79m	33828	20864	£149.98m	
1.3 Local Centres/Parades																					
Bishopmill																					
Convenience	Scotmid	1	274	178	£8,477 psm	90%	£1.51m	254	165	£2,122 psm	92%	£0.35m						274	178	£1.51m	
General Comparison		2																254	165	£0.35m	
Bulky Goods																					
Services		7																628			
Vacant																					
TOTAL		10	274	178			£1.51m	254	165			£0.35m						1156	343	£1.86m	
Glen Moray Drive																					
Convenience		1	263	171	£3,277 psm	90%	£0.56m											263	171	£0.56m	
Gen Comp																					
Bulky Goods		1											62	40	£1,401 psm	110%	£0.06m	62	40	£0.06m	
Services		3																176			
Vacant																		237			
TOTAL		5	263	171			£0.56m						62	40			£0.06m	738	211	£0.62m	
Hermes Road																					
Convenience																					
Gen Comp																					
Bulky Goods		1											40	26	£1,401 psm	110%	£0.04m	40	26	£0.04m	
Services		3																234			
Vacant																					
TOTAL		4											40	26			£0.04m	274	26	£0.04m	
New Elgin																					
Convenience		1	47	30	£3,277 psm	90%	£0.10m											47	30	£0.10m	
Gen Comp																					
Bulky Goods																					
Services		6																289			
Vacant		4																159			
TOTAL		11	47	30			£0.10m											494	30	£0.10m	
Southfield Drive																					
Convenience	Scotmid	1	383	249	£8,477 psm	90%	£2.11m											383	249	£2.11m	
Gen Comp		1	112	73	£3,277 psm	90%	£0.24m	218	142	£2,122 psm	92%	£0.30m						112	73	£0.24m	
Bulky Goods		2											422	274	£1,401 psm	110%	£0.38m	218	142	£0.30m	
Services		2																422	274	£0.38m	
Vacant		2																302			
TOTAL		8	495	321			£2.35m	218	142			£0.30m	422	274			£0.38m	1436	737	£3.03m	
1.4 Remainder Elgin																					
Convenience	Lidl	1	1412	1093	£6,467 psm	90%	£7.07m	249	193	£7,052 psm	92%	£1.36m						1661	1286	£8.43m	
	Others	4	361	235	£3,277 psm	90%	£0.77m											361	235	£0.77m	
		5	1773	1328			£7.84m	249	193			£1.36m						2022		£9.20m	
General Comparison																					
Bulky Goods	Decora	1						489	391	£1,189 psm	92%	£0.46m	4397	3518	£1,413 psm	110%	£4.97m	4886	3908	£5.44m	
	Gramplan Furnishers	1											2905	2321	£1,413 psm	110%	£3.28m	2905	2321	£3.28m	
	Others	1											145	94	£1,401 psm	110%	£0.13m	145	94	£0.13m	
		3						489	391			£0.46m	7446	5933			£8.38m	7935	6323	£8.85m	
Services		13																1389			
Vacant		3																157			
TOTAL		24	1773	1328			£7.84m	738	584			£1.83m	7446	5933			£8.38m	11504	6323	£18.05m	
Other Zone 1							£12.35m					£2.48m					£8.86m				
TOTAL ZONE 1		358	20507	13137			£120.12m	38370	24481			£156.01m	22373	16922			£58.81m	112066	53019	£334.95m	
ZONE 2: ELGIN RURAL																					
2.1 Hopeman																					
Convenience		4	388	252	£3,874 psm	106%	£0.98m											388	252	£0.98m	
Gen Comp		1						99	64	£2,310 psm	91%	£0.15m						99	64	£0.15m	
Bulky Goods																					
Services		5																372			
Vacant																					
TOTAL		10	388	252			£0.98m	99	64			£0.15m						859	317	£1.13m	
2.2 Burghead																					
Convenience		2	205	133	£3,874 psm	106%	£0.52m														

ZONE 4: LOSSIEMOUTH															
4.1 Lossiemouth Town Centre Convenience Co-op Others Total Convenience	1	458	298	£8,336 psm	88%	£2.48m									
	7	531	345	£3,867 psm	88%	£1.34m									
	8	989	643												
	11														
	0														
General Comparison	1														
Bulky Goods	0														
Services	35														
Vacant	1														
TOTAL	55	989	643	£3.82m			882	573	£3,073 psm	100%	£1.76m	458	298	£2.48m	
													531	345	£1.34m
													989	643	£3.82m
													882	573	£1.76m
													3404	81	
													5366	1216	£5.58m

TABLE 19: FLOORSPACE AND TURNOVER 2030  
2019 Prices

		No.	GFA Sq M	NFA Sq M	Convenience			General Comparison				Bulky Goods				All Goods				
					Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m	GFA Sq M	NFA Sq M	Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m	GFA Sq M	NFA Sq M	Total Turnover £m
ZONE 1: ELGIN																				
1.1 Elgin City Centre																				
Convenience	Tesco	1	4944	3155	£11,886 psm	93%	£37.50m	3955	2524	£9,162 psm	98%	£23.13m	989	631	£7,338 psm	121%	£4.63m	9888	6310	£65.26m
	Aldi	1	978	685	£10,800 psm	93%	£7.40m	173	121	£12,809 psm	98%	£1.55m						1151	806	£8.94m
	M&S Foodhall	1	1481	889	£7,933 psm	93%	£7.05m	78	47	£6,115 psm	98%	£0.29m						1559	935	£7.34m
	Farmfoods	1	815	611	£4,654 psm	93%	£2.84m											815	611	£2.84m
	Remainder	12	2076	1245	£5,032 psm	93%	£6.27m											2076	1245	£6.27m
Total Conv		16	10293	6585			£61.05m	4206	2692			£24.96m	989	631			£4.63m	15488	9907	£90.64m
General Comparison		73						19689	11814	£5,650 psm	98%	£66.75m	3454	2763	£3,481 psm	121%	£9.62m	19689	11814	£66.75m
Bulky Goods		9																3454	2763	£9.62m
Services		142																17460		
Vacant		32																6546		
TOTAL		272	10293	6585			£61.05m	23895	14505			£91.71m	4443	3394			£14.25m	62637	24484	£167.01m
1.2 Edgar Road Area																				
Convenience	ASDA	1	5399	2969	£12,274 psm	100%	£36.44m	4319	2375	£13,180 psm	147%	£31.31m	1080	594	£8,386 psm	144%	£4.98m	10798	5939	£72.73m
	Food Warehouse	1	948	759	£6,726 psm	100%	£5.10m											948	759	£5.10m
	Other	1	678	542	£4,228 psm	100%	£2.29m											678	542	£2.29m
Total		3	7025	4270			£43.84m	4319	2375			£31.31m	1080	594			£4.98m	12424	7239	£80.13m
General Comparison	Next	1						794	595	£4,487 psm	147%	£2.67m						794	595	£2.67m
	Matalan	1						1946	1459	£2,760 psm	147%	£4.03m						1946	1459	£4.03m
	Home Bargains	1	338	254	£7,697 psm	100%	£1.95m	789	592	£11,357 psm	147%	£6.72m						1127	845	£8.67m
	New Look	1						804	603	£4,410 psm	147%	£2.66m						804	603	£2.66m
	Boots	1						651	488	£9,219 psm	147%	£4.50m						651	488	£4.50m
	JD Sports	1						581	436	£9,209 psm	147%	£4.01m						581	436	£4.01m
	B&M	1						2474	1855	£5,510 psm	147%	£10.22m						2474	1855	£10.22m
	Sports Direct	1						909	682	£6,681 psm	147%	£4.55m						909	682	£4.55m
Total G Comp		8	338	254			£1.95m	8946	6710			£39.36m						9285	6963	£41.31m
Bulky Goods	B&Q	1											4238	3178	£2,235 psm	144%	£7.10m	4238	3178	£7.10m
	Dreams	1											529	397	£2,235 psm	144%	£0.89m	529	397	£0.89m
	Pets @Home	1											717	538	£1,897 psm	144%	£1.02m	717	538	£1.02m
	Carpetright	1											637	478	£3,808 psm	144%	£1.82m	637	478	£1.82m
	Tapl	1											875	656	£1,644 psm	144%	£1.08m	875	656	£1.08m
	Currys	1											1406	1055	£16,217 psm	144%	£17.10m	1406	1055	£17.10m
	Bensons	1											479	359	£16,217 psm	144%	£5.83m	479	359	£5.83m
Total BG		7											8881	6661			£34.84m	8881	6661	£34.84m
Services		2																706		
Vacant		4																2533		
TOTAL EDGAR ROAD AREA		24	7363	4524			£45.79m	13266	9085			£70.67m	9961	7255	£0 psm		£39.82m	33828	20864	£156.28m
1.3 Local Centres/Parades																				
Bishopmill																				
Convenience	Scotmid	1	274	178	£8,422 psm	92%	£1.50m											274	178	£1.50m
	General Comparison	2						254	165	£2,366 psm	101%	£0.39m						254	165	£0.39m
Bulky Goods																				
Services		7																628		
Vacant																				
TOTAL		10	274	178			£1.50m	254	165			£0.39m						1156	343	£1.89m
Glen Moray Drive																				
Convenience		1	263	171	£3,255 psm	92%	£0.56m											263	171	£0.56m
	Gen Comp	1																		
Bulky Goods													62	40	£1,557 psm	119%	£0.06m	62	40	£0.06m
Services		3																176		
Vacant																		237		
TOTAL		5	263	171			£0.56m						62	40			£0.06m	738	211	£0.62m
Hermes Road																				
Convenience																				
	Gen Comp																			
Bulky Goods		1											40	26	£1,557 psm	119%	£0.04m	40	26	£0.04m
Services		3																234		
Vacant																				
TOTAL		4											40	26			£0.04m	274	26	£0.04m
New Elgin																				
Convenience		1	47	30	£3,255 psm	92%	£0.10m											47	30	£0.10m
	Gen Comp																			
Bulky Goods																				
Services		6																289		
Vacant		4																159		
TOTAL		11	47	30			£0.10m											494	30	£0.10m
Southfield Drive																				
Convenience	Scotmid	1	383	249	£8,422 psm	92%	£2.10m											383	249	£2.10m
		1	112	73	£3,255 psm	92%	£0.24m											112	73	£0.24m
Gen Comp		2						218	142	£2,366 psm	101%	£0.33m						218	142	£0.33m
Bulky Goods		2											422	274	£1,557 psm	119%	£0.43m	422	274	£0.43m
Services		2																302		
Vacant																				
TOTAL		8	495	321			£2.33m	218	142			£0.33m	422	274			£0.43m			



ZONE 4: LOSSIEMOUTH																
4.1 Lossiemouth Town Centre																
Convenience	1	458	298	£8,244 psm	90%	£2.45m							458	298	£2.45m	
Others	7	531	345	£3,824 psm	90%	£1.32m							531	345	£1.32m	
Total Convenience	8	989	643			£3.77m							989	643	£3.77m	
General Comparison	11						882	573	£3,367 psm	107%	£1.93m		882	573	£1.93m	
Bulky Goods	0															
Services	35												3404			
Vacant	1												81			
TOTAL	55	989	643			£3.77m	882	573			£1.93m		5356	1216	£5.71m	
4.2 Lossiemouth OOC																
Convenience	1	841	547	£9,342 psm	102%	£5.11m	93	61	£3,187 psm	122%	£0.19m		935	608	£5.30m	
General Comparison																
Bulky Goods	1											79	51	£1,252 psm	96%	£0.06m
Services	7												79	51	£0.06m	
Vacant													471			
TOTAL	9	841	547			£5.11m	93	61			£0.19m		1485	659	£5.37m	
4.3 Other Rural Zone 4																
Convenience																
General Comparison																
Bulky Goods																
Services	1												155			
Vacant																
TOTAL	1															
Other Zone 4				£5.11m					£0.19m							
TOTAL ZONE 4	65	1830.51	1190			£8.88m	976	634			£2.12m		79	51	£0.06m	
ZONE 5: SPEYSIDE AND GLENLIVET																
5.1 Aberlour																
Convenience	1	330	215	£6,772 psm	74%	£1.45m							330	215	£1.45m	
Co-op	5	847	551	£2,618 psm	74%	£1.44m							847	551	£1.44m	
Others		1178	765			£2.90m							1178	765	£2.90m	
Total Convenience	6						366	238	£4,603 psm	147%	£1.09m		366	238	£1.09m	
General Comparison	4											66	43	£1,532 psm	98%	£0.07m
Bulky Goods	1												66	43	£0.07m	
Services	7												480			
Vacant	2												133			
TOTAL	20	1178	765			£2.90m	366	238			£1.09m		2223	1046	£4.06m	
5.2 Dufftown																
Convenience	1	353	230	£7,069 psm	77%	£1.62m							353	230	£1.62m	
Co-op	4	253	164	£2,732 psm	77%	£0.45m							253	164	£0.45m	
Others		606	394			£2.07m							606	394	£2.07m	
Total Convenience	5						282	184	£2,668 psm	85%	£0.49m		282	184	£0.49m	
General Comparison	5											87	57	£1,751 psm	112%	£0.10m
Bulky Goods	1												87	57	£0.10m	
Services	19												1426			
Vacant	5												324			
TOTAL	35	606	394			£2.07m	282	184			£0.49m		2725	634	£2.66m	
5.3 Rothes																
Convenience	3	407	264	£3,486 psm	98%	£0.92m	109	71	£3,970 psm	127%	£0.28m		407	264	£0.92m	
General Comparison	2												109	71	£0.28m	
Bulky Goods	1												107	69	£0.13m	
Services	8												480			
Vacant																
TOTAL	14	407	264			£0.92m	109	71			£0.28m		1103	405	£1.34m	
5.4 Tomintoul																
Convenience	2	330	215	£3,309 psm	94%	£0.71m	190	124	£1,864 psm	71%	£0.23m		330	215	£0.71m	
General Comparison	1												190	124	£0.23m	
Bulky Goods																
Services	3												472			
Vacant																
TOTAL	6	330	215			£0.71m	190	124			£0.23m		992	338	£0.94m	
5.5 Other Rural																
Convenience	2	75	48	£8,560 psm	94%	£0.42m	42	28	£1,864 psm	71%	£0.05m		75	48	£0.42m	
General Comparison	2												42	28	£0.05m	
Bulky Goods																
Services	2												134			
Vacant																
TOTAL	6	75	48			£0.42m	42	28			£0.05m		251	76	£0.47m	
Other Zone 5				£1.13m					£0.28m							
TOTAL ZONE 5	81	2595	1687			£7.02m	990	643			£2.15m		260	169	£0.30m	
ZONE 6: KEITH																
6.1 Keith Town Centre (Total)																
Convenience	12	1497	973	£2,700 psm	64%	£2.63m	2608	1695	£3,839 psm	105%	£6.51m		1497	973	£2.63m	
General Comparison	21												2608	1695	£6.51m	
Bulky Goods	3												1443	1082	£3.18m	
Services	37												3851			
Vacant	12												1925			
TOTAL	85	1497	973			£2.63m	2608	1695			£6.51m		11324	3751	£12.31m	
6.2 Keith OOC																
Convenience	1	2369	1540	£9,076 psm	71%	£13.98m	1015	660	£8,538 psm	92%	£5.64m		3385	2200	£19.61m	
General Comparison	1	134	100	£2,592 psm	71%	£0.26m	1205	904	£3,351 psm	92%	£3.03m		1339	1004	£3.29m	
Bulky Goods																
Services																
Vacant																
TOTAL	2	2503	1641			£14.24m	2221	1564			£8.66m		4724	3205	£22.90m	
6.3 Other Rural																
Convenience	2	131	85	£1,976 psm	56%	£0.17m							131	85	£0.17m	
General Comparison																
Bulky Goods																
Services	2												196			
Vacant	1												50			
TOTAL	5	131	85			£0.17m					£0.00m		377	85	£0.17m	
TOTAL ZONE 6	92	4132	2699			£17.04m	4828	3259			£15.17m		1443	1082	£3.18m	
ZONE 7: BUCKIE																
7.1 Buckie Town Centre																
Convenience	1	729	474	£8,643 psm	94%	£4.10m	81	53	£7,096 psm	106%	£0.37m		810	527	£4.47m	
Co-op	1	1393	1093	£6,594 psm	94%	£7.21m	246	193	£8,328 psm	106%	£1.61m		1639	1286	£8.81m	
Others	10	1291	839	£4,009 psm	94%	£3.36m							1291	839	£3.36m	
Total Convenience	12	3413	2406			£14.67m							3740	2652	£16.65m	
General Comparison	1						327	246	£3,898 psm	106%	£2.16m	82	62	£2,266 psm	124%	£0.14m
Orig Factory Shop																
M&Co	1						740	555	£1,459 psm	106%	£0.95m		822	617	£2.30m	
Others	21						1002	651	£3,898 psm	106%	£7.38m		1002	651	£0.95m	
Total Comparison	23						2911	1892	£3,898 psm	106%	£10.49m		2911	1892	£7.38m	
Bulky Goods	4						4653.01	3098			£10.49m	82	62	£2,266 psm	124%	£0.14m
Services	41											1100	715	£2,266 psm	124%	£0.14m
Vacant	6												4735	3160	£10.63m	
TOTAL	86	3413	2406			£14.67m	4980	3344			£12.47m	1182	777		£1.76m	
7.2 Buckie OOC																
Convenience	1	1732	1299	£11,774 psm	92%	£15.30m	742	557	£8,408 psm	90%	£4.68m		2475	1856	£19.98m	
Tesco	8	1354	880	£3,251 psm	92%	£2.86m							1354	880	£2.86m	
Others		3086	2179			£18.16m							3829	2736	£22.84m	
Total Convenience	9						742	557	£2,357 psm	90%	£0.34m		221	143	£0.34m	
General Comparison	3											39	25	£1,292 psm	99%	£0.03m
Bul																

TABLE 20: FLOORSPACE AND TURNOVER 2035  
2019 Prices

		No.	GFA Sq M	NFA Sq M	Convenience			GFA Sq M	NFA Sq M	General Comparison			GFA Sq M	NFA Sq M	Bulkly Goods			GFA Sq M	NFA Sq M	All Goods								
					Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m			Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m			Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m			Turnover Rate £/Sq M	Actual/ Average	Total Turnover £m						
ZONE 1: ELGIN																												
1.1 Elgin City Centre																												
Convenience	Tesco	1	4944	3155	£11,877 psm	96%	£37.47m	3955	2524	£9,838 psm	103%	£24.83m	989	631	£8,061 psm	130%	£5.09m	9888	6310	£67.39m								
	Aldi	1	978	685	£10,792 psm	96%	£7.39m																					
	M&S Foodhall	1	1481	889	£7,927 psm	96%	£7.04m																					
	Farmfoods	1	815	611	£4,650 psm	96%	£2.84m																					
	Remainder	12	2076	1245	£5,028 psm	96%	£6.26m																					
Total Conv		16	10293	6585			£61.01m	4206		2692			989		631			15488		9907								
General Comparison		73					£71.68m	19689		11814			3454		2763			19689		11814								
Bulkly Goods		9																3454		2763								
Services		142																17460		6546								
Vacant		32																										
TOTAL		272	10293	6585			£61.01m	23895		14505			4443		3394			62637		24484								
1.2 Edgar Road Area																												
Convenience	ASDA	1	5399	2969	£12,197 psm	102%	£36.22m	4319	2375	£14,116 psm	153%	£33.53m	1080	594	£9,201 psm	154%	£5.46m	10798	5939	£75.22m								
	Food Warehouse	1	948	759	£6,684 psm	102%	£5.07m																					
	Other	1	678	542	£4,202 psm	102%	£2.28m																					
Total		3	7025	4270			£43.57m	794		595			1080		594			12424		7239								
General Comparison	Next	1						4319	2375	£4,806 psm	153%	£22.86m	1080	594				794	595	£2.86m								
	Matalan	1																										
	Home Bargains	1																										
	New Look	1	338	254	£8,099 psm	102%	£2.05m																					
	Boots	1																										
	JD Sports	1																										
	B&M	1																										
	Sports Direct	1																										
	Total G Comp		8	338	254		£2.05m																					
	B&Q	1																										
Bulkly Goods	Dreams	1						8946	6710	£2,956 psm	153%	£4.31m	4238	3178	£2,452 psm	154%	£7.79m	4238	3178	£7.79m								
	Pets @Home	1																										
	Carpetright	1																										
	Tapl	1																										
	Currys	1																										
	Bensons	1																										
	Total BG		7																									
Services		2																9285		6963								
Vacant		4																706		2533								
TOTAL EDGAR ROAD AREA		24	7363	4524			£45.62m	13266		9085			9961		7255			33828		20864								
1.3 Local Centres/Parades																												
Bishopmill																												
Convenience	Scotmid	1	274	178	£8,444 psm	95%	£1.50m	254	165	£2,664 psm	110%	£0.44m						274	178	£1.50m								
	General Comparison	2																										
Bulkly Goods																		254		165								
Services		7																628										
Vacant																												
TOTAL		10	274	178			£1.50m	254		165								1156		343								
Glen Moray Drive																												
Convenience		1	263	171	£3,264 psm	95%	£0.56m						62	40	£1,756 psm	131%	£0.07m	263	171	£0.56m								
	Gen Comp	1																										
Bulkly Goods																		62		40								
Services		3																176		237								
Vacant																												
TOTAL		5	263	171			£0.56m						62		40			738		211								
Hermes Road																												
Convenience																												
	Gen Comp	1																										
Bulkly Goods		3											40		26			40		26								
Services																		234										
Vacant																												

ZONE 4: LOSSIEMOUTH																	
4.1 Lossiemouth Town Centre Convenience Co-op Others Total Convenience	1	458	298	£8,125 psm	92%	£2.42m							458	298	£2.42m		
	7	531	345	£3,769 psm	92%	£1.30m							531	345	£1.30m		
	8	989	643			£3.72m	882	573	£3,726 psm	116%	£2.14m				£3.72m		
	11												882	573	£2.14m		
	0												3404	81			
General Comparison	35												5356	1216	£5.86m		
Bulky Goods	1												536	1216	£5.86m		
Services	1												536	1216	£5.86m		
Vacant	1												536	1216	£5.86m		
TOTAL	55	989	643			£3.72m	882	573			£2.14m				£0.00m		
4.2 Lossiemouth OOC																	
Convenience	1	841	547	£9,191 psm	104%	£5.03m	93	61	£3,546 psm	132%	£0.22m				935	608	£5.24m
General Comparison	1												79	51	£1,393 psm	104%	£0.07m
Bulky Goods	1												79	51			£0.07m
Services	7												471			£0.07m	
Vacant	1												1485	659			£5.31m
TOTAL	9	841	547			£5.03m	93	61			£0.22m				79	51	£0.07m
4.3 Other Rural Zone 4																	
Convenience	1												155				
General Comparison	1												155				
Bulky Goods	1												155				
Services	1												155				
Vacant	1												155				
TOTAL	1												155				
Other Zone 4													155				
TOTAL ZONE 4	65	1830.51	1190			£8.75m	976	634			£2.35m	79	51			£0.07m	
ZONE 5: SPEYSIDE AND GLENLIVET																	
5.1 Aberlour Convenience Co-op Others Total Convenience	1	330	215	£6,629 psm	75%	£1.42m							330	215	£1.42m		
	5	847	551	£2,563 psm	75%	£1.41m							847	551	£1.41m		
	6	1178	765			£2.83m	366	238	£5,125 psm	159%	£1.22m				£2.83m		
	4												1178	765			
	1												366	238	£1.22m		
General Comparison	7												66	43	£1,690 psm	105%	£0.07m
Bulky Goods	2												66	43			£0.07m
Services	7												490	133			£0.07m
Vacant	2												133				
TOTAL	20	1178	765			£2.83m	366	238			£1.22m				66	43	£0.07m
5.2 Dufftown																	
Convenience	1	353	230	£6,904 psm	78%	£1.59m							353	230	£1.59m		
General Comparison	4	253	164	£2,669 psm	78%	£0.44m							253	164	£0.44m		
Bulky Goods	5	606	394			£2.02m	282	184	£2,964 psm	92%	£0.54m				£2.02m		
Services	1												282	184	£0.54m		
Vacant	19												87	57	£1,932 psm	120%	£0.11m
TOTAL	5												1426	324			£0.11m
5.3 Rothes	35	606	394			£2.02m	282	184			£0.54m				87	57	£0.11m
Convenience	3	407	264	£3,408 psm	99%	£0.90m	109	71	£4,381 psm	136%	£0.31m				407	264	£0.90m
General Comparison	2												109	71			£0.31m
Bulky Goods	1												107	69	£2,100 psm	131%	£0.15m
Services	8												480			£0.15m	
Vacant	1												1103	405			£1.36m
TOTAL	14	407	264			£0.90m	109	71			£0.31m				107	69	£0.15m
5.4 Tomintoul																	
Convenience	2	330	215	£3,240 psm	95%	£0.70m	190	124	£2,057 psm	77%	£0.25m				330	215	£0.70m
General Comparison	1												190	124			£0.25m
Bulky Goods	3												472				
Services	3												472				
Vacant	3												472				
TOTAL	6	330	215			£0.70m	190	124			£0.25m				992	338	£0.95m
5.5 Other Rural																	
Convenience	2	75	48	£8,381 psm	95%	£0.41m	42	28	£2,057 psm	77%	£0.06m				75	48	£0.41m
General Comparison	2												42	28			£0.06m
Bulky Goods	2												134				
Services	2												251	76			£0.46m
Vacant	6	75	48			£0.41m	42	28			£0.06m				251	76	£0.46m
Other Zone 5													251	76			£0.46m
TOTAL ZONE 5	81	2595	1687			£6.86m	990	643			£2.38m	260	169			£0.33m	
ZONE 6: KEITH																	
6.1 Keith Town Centre (Total) Convenience General Comparison Bulky Goods Services Vacant	12	1497	973	£2,612 psm	64%	£2.54m	2608	1695	£4,214 psm	112%	£7.14m				1497	973	£2.54m
	21												2608	1695	£7.14m		
	3												1443	1082	£3,255 psm	173%	£3.52m
	37												1443	1082			£3.52m
	12												3851	1925			
TOTAL	85	1497	973			£2.54m	2608	1695			£7.14m				1443	1082	£3.52m
6.2 Keith OOC																	
Convenience	1	2369	1540	£8,794 psm													