

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

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reference:

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Schedule of model scenarios

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 RPBN 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	£4.00m	£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
Total Moray		93295	95820	95710	95792	95662	95170	94390

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: RESIDENTS' 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 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 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				Moray	Leakage	Total	
	Available Expenditure	Zone 1: Elgin -Edgar Road	Other Zone 1	Zone 2	Zone 3: Other Forres	Other Zone 3	Lossiemouth OOC + Other Zone 4	Aberforour	Dufftown	Rothies	Other Zone 5	Keith Town Centre	Other Keith	Other Zone 6	Buckie Town Centre	Other Buckie	Cullen	Other Zone 7	Fochabers Town Centre	Other Zone 8	Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total				
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%														1.0%					99%	1%	100.0%	
3	£41.2m	5.0%			15.0%	60.0%	10.0%																10.0%					90%	10%	100.0%	
4	£18.5m	35.0%	17.5%	1.5%																								100%	0%	100.0%	
5	£19.0m	20.0%	30.0%	2.0%																								94%	6%	100.0%	
6	£18.2m	3.0%	3.0%					15.0%	10.0%	5.0%	6.0%																	98%	2%	100.0%	
7	£35.9m	1.0%	3.0%																									99%	1%	100.0%	
8	£11.9m	22.0%	23.0%	7.0%																								100%	0%	100.0%	
Total	£231.99m																														
Tourism: Percent of Net Expenditure £2.13m			45%		5%		10%		10%		10%			5%			10%			5%								100%	0%	100.0%	
Inflows - % of turnover from:																															
Aberdeenshire			5%	5%																											
Highland			3%	3%																											

**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				Moray	Leakage	Total
	Available Expenditure	Zone 1: Elgin -Edgar Road	Other Zone 1	Zone 2	Zone 3: Other Forres	Other Zone 3	Lossiemouth OOC + Other Zone 4	Aberforour	Dufftown	Rothies	Other Zone 5	Keith Town Centre	Other Keith	Other Zone 6	Buckie Town Centre	Other Buckie	Cullen	Other Zone 7	Fochabers Town Centre	Other Zone 8	Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total			
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	£0.5m	£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	£0.3m	£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	£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	£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	£0.9m	£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	£0.2m	£0.0m	£0.0m	£0.0m	£2.7m	£12.8m	£0.2m	£0.5m	£0.4m	£0.0m	£0.0m	£0.0m	£0.0m	£0.4m	£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	£1.1m	£0.0m	£13.6m	£16.5m	£1.8m	£1.1m	£0.0m	£0.0m	£0.4m	£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	£0.8m	£1.0m	£0.0m	£0.0m	£3.0m	£1.0m	£0.0m	£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%	1%	1%	0%	0%	1%	6%	0%	6%	8%	1%	0%	1%	0%	0%	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							
Aberdeenshire		£3.09m	£2.33m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.06m	£0.00m	£0.00m	£0.00m	£0.15m	£0.94m	£0.09m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m							
Highland		£1.86m	£1.40m	£0.00m	£0.00m	£0.07m	£1.35m	£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							
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				Moray	Leakage	Total		
	Zone 1: Elgin -Edgar Road	Other Zone 1	Zone 2	Zone 3: Other Forres	Other Zone 3	Lossiemouth OOC + Other Zone 4	Aberforour	Dufftown	Rothies	Other Zone 5	Keith Town Centre	Other Keith	Other Zone 6	Buckie Town Centre	Other Buckie	Cullen	Other Zone 7	Fochabers Town Centre	Other Zone 8	Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total					
1	44%	41%	61%	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%		
2	22%	26%	97%	0%	5%	2%	0%	12%	0%	0%	0%	0%	0%	0%	0%	0%	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%	0%	0%	0%	0%	0%	0%	0%		
4	10%	7%	2%	0%	0%	93%	86%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	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%	0%	0%	0%	0%	0%	0%	0%	0%	0%	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%	0%	0%	0%	0%	0%	0%	0%	0%	
7	1%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	89%	88%	94%	98%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
8	4%	6%	7%	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%	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%	3%	0%	0%	0%	5%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Highland		3%	3%	0%	0%	1%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Total Inflows		9%	9%	0%	3%	2%	5%	0%	3%	6%	5%	2%	4%	4%	5%	6%	2%	3%	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%	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																													
	Available Expenditure	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																											
1	£15.6m	23.0%	53.3%	15.0%	2.0%																										93.3%	6.7%	100.0%																								
2	£8.9m	21.0%	51.3%	15.0%	2.0%																			3.0%		3.0%					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%					80.8%	19.2%	100.0%																								
4	£5.3m	19.0%	55.3%	10.0%				2.0%																3.0%		9.0%					87.3%	12.7%	100.0%																								
5	£5.5m	24.0%	37.8%	10.0%							1.0%	1.5%	2.0%											4.0%		10.0%					85.3%	14.7%	100.0%																								
6	£5.2m	12.5%	54.8%	10.0%										9.0%										7.5%		2.0%					89.8%	10.2%	100.0%																								
7	£10.4m	10.0%	51.3%	10.0%										9.0%										4.0%		2.0%					93.3%	6.7%	100.0%																								
8	£3.2m	14.0%	51.0%	15.0%										9.0%				12.8%	0.3%					3.4%		5.0%					91.0%	9.0%	100.0%																								
Total	£65.38m																																																								
Tourism: Percent of Net Expenditure																												0.0%	0.0%	0.0%																											
Inflows - % of turnover from:																												0.0%	0.0%	0.0%																											
Aberdeenshire		5%	5%																											10.0%	1%																										
Highland		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				
	Available Expenditure	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		
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	£0.0m	£0.3m	£0.0m	£0.4m	£0.1m	£8.2m	£0.8m	£8.9m		
3	£11.3m	£1.1m	£3.3m	£1.1m	£0.2m	£1.7m	£0.2m	£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	£0.0m	£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	£0.0m	£0.0m	£0.0m	£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	£0.0m	£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	£0.6m	£0.0m	£0.0m	£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	£0.9m	£0.0m	£0.0m	£0.0m	£1.3m	£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	£0.3m	£0.0m	£0.0m	£0.0m	£0.1m	£0.0m	£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	£1.4m	£0.0m	£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%	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	£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	£0.04m	£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	£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	£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	£0.00m	£0.00m	£0.00m	£0.00m	£62.5m				
		£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	Aberdeen	Aberdeenshire	Highland	Other	Moray	Leakage	Total		
1	30%	25%	30%	64%	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%	
2	16%	14%	17%	36%	0%	0%	35%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	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%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
4	8%	9%	7%	0%	0%	0%	21%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
5	11%	6%	7%	0%	0%	0%	0%	0%	0%	100%	100%	100%	0%	19%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
6	5%	8%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	25%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
7	9%	16%	13%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	36%	0%	0%	93%	97%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
8	4%	5%	6%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	11%	0%	0%	4%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
External inflows of expenditure from:																															
Tourists		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%	0%	0%	0%
Aberdeenshire		5%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	0%	0%	3%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Highland		3%	3%	0%	0%	3%	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%
Total Inflows		8%	8%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	10%	0%	0%	3%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Grand Total		£12.01m	£33.65m	£7.92m	£0.49m	£1.75m	£1.75m	£0.51m	£0.00m	£0.05m	£0.08m	£0.11m	£0.00m	£2.62m	£0.00m	£0.00m															

**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: 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	£54.8m	50.0%	35.0%	14.0%																															99%	1%	100.0%
2	£31.6m	42.0%	32.0%	10.0%	10.0%	1.0%	1.5%		0.5%	2.0%																									99%	1%	100.0%
3	£40.5m	5.0%				15.0%	60.0%	10.0%																											90%	10%	100.0%
4	£17.7m	35.0%	17.5%	1.5%			1.0%		20.0%	25.0%																									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%																98%	2%	100.0%
7	£34.7m	1.0%	3.0%																																99%	1%	100.0%
8	£11.8m	22.0%	23.0%	7.0%																															100%	0%	100.0%
Total	£227.06m																																				
Tourism: Percent of Net Expenditure	£2.24m	45%	18%	3%	5%	10%	8%	0%	10%	5%	5%	5%	2%	1%	2%		5%	4%	0%			10%				5%								100%	0%	100.0%	
Inflows - % of turnover from:																																					
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: 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	£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	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£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	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£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	£0.0m	£0.0m	£0.0m	£4.0m	£0.0m	£0.0m	£0.0m	£0.0m	£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	£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	£0.0m	£2.8m	£1.8m	£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	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£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	£0.0m	£0.2m	£0.0m	£0.0m	£0.0m	£2.6m	£12.2m	£0.2m	£0.0m	£0.0m	£0.5m	£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	£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	£0.0m	£0.0m	£1.0m	£0.0m	£0.0m	£0.0m	£13.2m	£16.0m	£1.7m	£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	£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	£0.0m	£0.0m	£0.0m	£0.0m	£0.8m	£0.9m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£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	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£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%	0%	0%	0%	0%	0%	0%	0%	0%	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	£0.09m	£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	£0.00m	£0.06m	£0.00m	£0.00m	£0.00m	£0.08m	£0.44m	£0.00m	£0.08m	£0.44m	£0.00m	£0.15m	£0.91m	£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	£0.00m	£0.00m	£7.07m	
Highland		£1.83m	£1.38m	£0.00m	£0.00m	£0.06m	£1.32m	£0.00m	£0.09m	£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	£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	£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: 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	
1	45%	41%	62%	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%	0%	0%	0%	0%	0%
2	22%	22%	26%	97%	5%	2%	0%	4%																											

**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					
	Available Expenditure	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			
1	£55.2m	50.0%	35.0%	14.0%																											99%	1%	100.0%
2	£30.5m	42.0%	32.0%	10.0%	10.0%	1.0%	1.5%		0.5%	2.0%																					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%												15.0%	5.0%	1.0%								1.0%	5.0%					98%	2%	100.0%
7	£34.5m	1.0%	3.0%																												99%	1%	100.0%
8	£11.5m	22.0%	23.0%	7.0%																											100%	0%	100.0%
Total	£225.69m																																
Tourism: Percent of Net Expenditure	£2.37m	45%	18%	3%	5%	10%	8%	0%	10%	5%	2%	1%	2%	5%	4%	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%	3%					1%	5%	5%														

**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								
	Available Expenditure	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						
1	£55.2m	£27.6m	£19.3m	£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	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£54.7m	£0.6m	£55.2m		
2	£30.5m	£12.8m	£9.8m	£3.1m	£3.1m	£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	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£30.2m	£0.3m	£30.5m
3	£41.6m	£2.1m	£0.0m	£0.0m	£0.0m	£6.2m	£24.9m	£4.2m	£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	£0.0m	£0.0m	£0.0m	£4.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£37.4m	£4.2m	£41.6m		
4	£17.5m	£6.1m	£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	£0.0m	£0.0m	£0.0m	£0.0m	£17.5m	£0.0m	£17.5m	
5	£18.0m	£3.6m	£5.4m	£0.4m	£0.0m	£0.0m	£0.2m	£0.0m	£0.0m	£0.0m	£2.7m	£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	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£16.9m	£1.1m	£18.0m	
6	£16.8m	£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	£2.5m	£11.8m	£0.2m	£0.5m	£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	£16.5m	£0.3m	£16.8m	
7	£34.5m	£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	£13.1m	£15.9m	£1.7m	£1.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£34.2m	£0.3m	£34.5m	
8	£11.5m	£2.5m	£2.6m	£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	£0.8m	£0.9m	£0.0m	£0.0m	£0.0m	£2.9m	£0.9m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£11.5m	£0.0m	£11.5m		
Total	£225.7m	£55.6m	£41.7m	£12.2m	£3.1m	£6.5m	£25.7m	£4.2m	£3.7m	£5.0m	£2.7m	£2.0m	£0.9m	£1.1m	£2.5m	£13.7m	£0.2m	£14.4m	£17.2m	£1.7m	£1.0m	£2.9m	£0.9m	£0.0m	£0.0m	£5.9m	£0.0m	£218.9m	£6.8m	£225.7m						
Market Share of Moray Res' Av Exp		25%	18%	5%	1%	3%	11%	2%	2%	1%	1%	0%	0%	1%	6%	0%	6%	8%	1%	0%	1%	0%	0%	0%	0%	3%	0%	97%	3%	100%						
Inflows																																				
Tourists		£0.59m	£0.42m	£0.06m	£0.12m	£0.06m	£0.18m	£0.00m	£0.12m	£0.12m	£0.12m	£0.05m	£0.02m	£0.05m	£0.02m	£0.09m	£0.00m	£0.08m	£0.11m	£0.02m	£0.02m	£0.08m	£0.04m											£2.37m		
Aberdeenshire		£3.02m	£2.27m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.06m	£0.00m	£0.00m	£0.08m	£0.42m	£0.00m	£0.15m	£0.90m	£0.09m	£0.00m	£0.00m	£0.00m											£6.99m		
Highland		£1.81m	£1.36m	£0.00m	£0.00m	£0.07m	£1.35m	£0.00m	£0.00m	£0.00m	£0.08m	£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		£61.05m	£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													

**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 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				
1	45%	42%	63%	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%	0%		
2	21%	25%	96%	0%	5%	2%	0%	4%	12%	0%	0%	0%	0%	0%	0%	0%	0%	0%	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%	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%	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%	0%	0%	0%	0%	0%	0%	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%	0%	0%	0%	0%	0%	0%	0%	0%	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%	0%	0%	0%	0%	0%	0%	0%	0%	0%	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%</																											

**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						
	Available Expenditure	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				
1	£60.4m	45.7%	33.8%	1.5%																											82.0%	18.0%	100.0%	
2	£38.5m	37.0%	32.0%		2.0%				2.0%															1.7%		15.4%	0.9%			83.0%	17.0%	100.0%		
3	£47.4m	18.3%	16.4%			13.0%	5.0%	1.0%																1.6%		14.6%	0.8%			72.7%	27.3%	100.0%		
4	£19.4m	38.8%	34.7%	1.0%					6.0%	1.0%														1.1%		25.6%	0.6%			82.5%	17.5%	100.0%		
5	£18.8m	38.4%	24.7%	1.5%			2.0%				1.0%	1.0%	1.5%	1.5%										1.7%		15.0%	0.8%			77.5%	22.5%	100.0%		
6	£17.3m	11.0%	9.1%											28.0%	5.0%									5.4%		16.3%	0.7%			86.1%	13.9%	100.0%		
7	£34.4m	17.8%	20.6%											1.0%				33.0%	10.0%	5.0%	1.0%			8.7%		4.6%	0.6%			88.4%	11.6%	100.0%		
8	£17.1m	37.5%	30.6%	1.0%										0.5%	5.0%									7.3%		3.6%	0.7%			85.6%	14.4%	100.0%		
Total	£253.11m																																	
Tourism: Percent of Net Expenditure	£12.08m	35%	45%	10%		5%	20%	15%			8%	3%		5%	3%		5%	2%	3%			8%									100.0%	0.0%	100.0%	
Inflows - % of turnover from:																																		
Aberdeenshire		6%	4%											7.5%	2%		3%	3%	5%															
Highland		3%	3%			5%	5%	10%																										

**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				
	Available Expenditure	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		
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	£1.0m	£0.0m	£9.3m	£0.5m	£49.5m	£10.9m	£60.4m		
2	£38.5m	£14.2m	£12.3m	£0.0m	£0.8m	£0.0m	£1.9m	£1.9m	£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	£0.0m	£0.6m	£0.0m	£5.6m	£0.3m	£31.9m	£6.5m	£38.5m		
3	£47.4m	£8.7m	£7.8m	£0.0m	£0.0m	£6.2m	£6.2m	£5.7m	£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	£0.5m	£0.0m	£12.1m	£0.3m	£34.4m	£12.9m	£47.4m		
4	£19.4m	£7.5m	£6.7m	£0.2m	£0.0m	£0.0m	£0.0m	£0.2m	£1.2m	£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	£0.3m	£0.0m	£2.9m	£0.2m	£16.0m	£3.4m	£19.4m		
5	£18.8m	£7.2m	£4.6m	£0.3m	£0.0m	£0.0m	£0.4m	£0.0m	£0.0m	£0.0m	£0.2m	£0.2m	£0.3m	£0.3m	£0.0m	£0.0m	£0.0m	£0.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£1.0m	£0.0m	£3.1m	£0.1m	£14.6m	£4.2m	£18.8m		
6	£17.3m	£1.9m	£1.6m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£4.8m	£6.4m	£0.0m	£0.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£1.5m	£0.0m	£0.8m	£0.1m	£14.9m	£2.4m	£17.3m		
7	£34.4m	£6.1m	£7.1m	£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	£0.0m	£11.3m	£3.4m	£1.7m	£0.3m	£0.0m	£0.0m	£2.5m	£0.0m	£1.2m	£0.2m	£30.4m	£4.0m	£34.4m		
8	£17.1m	£6.4m	£5.2m	£0.2m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.1m	£0.9m	£0.0m	£0.0m	£0.0m	£1.2m	£0.0m	£0.0m	£0.7m	£0.0m	£0.8m	£0.0m	£1.5m	£0.2m	£14.7m	£2.5m	£17.1m		
Total	£253.1m	£79.6m	£65.7m	£1.6m	£0.8m	£6.2m	£8.5m	£8.4m	£1.9m	£0.2m	£0.2m	£0.3m	£0.3m	£5.5m	£8.2m	£0.0m	£11.5m	£4.6m	£1.7m	£0.3m	£0.7m	£0.0m	£8.3m	£0.0m	£36.6m	£1.9m	£206.3m	£46.8m	£253.1m			
Market Share of Moray Res' Av Exp		31%	26%	1%	0%	2%	3%	3%	1%	0%	0%	0%	0%	2%	3%	0%	5%	2%	1%	0%	0%	0%	3%	0%	14%	1%	81%	19%	100%			
Inflows																																
Tourists		£4.23m	£0.00m	£1.21m	£0.00m	£0.60m	£0.00m	£1.81m	£0.00m	£0.00m	£0.91m	£0.30m	£0.00m	£0.00m	£0.60m	£0.30m	£0.00m	£0.60m	£0.24m	£0.36m	£0.00m	£0.91m	£0.00m									£12.08m
Aberdeenshire		£5.25m	£2.83m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.00m	£0.44m	£0.17m	£0.00m	£0.36m	£0.14m	£0.09m	£0.00m	£0.00m	£0.00m									£9.28m
Highland		£2.62m	£2.12m	£0.00m	£0.00m	£0.32m	£0.45m	£0.93m	£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									£6.45m
TOTAL TURNOVER OF CENTRE	£91.71m	£70.67m	£2.76m	£0.77m	£7.09m	£8.90m	£11.15m	£1.93m	£0.19m	£1.09m	£0.49m	£0.28m	£0.28m	£6.51m	£8.66m	£0.00m	£12.47m	£5.02m	£2.17m	£0.34m	£1.59m	£0.00m										
		£3.82m																														

**TABLE 12C: GENERAL COMPARISON GOODS 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 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		
1	30%	29%	33%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%									
2	16%	17%	0%	100%	0%	22%	17%	40%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%										
3	9%	11%	0%	0%	87%	69%	51%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%										
4	8%	10%	7%	0%	0%	0%	2%	60%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%										
5	8%	7%	10%	0%	0%	4%	0%	0%	0%	17%	38%	100%	100%	3%	11%		0%	0%	0%	0%	0%										
6	2%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	74%	0%		1%	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	5%	0%	44%	0%	9%	0%	16%	0%	0%	83%	62%	0%	0%	9%	3%		5%	5%	17%	0%	57%										
Aberdeenshire	6%	4%	0%	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%	0%										
Total Inflows	13%	7%	44%	0%	13%</																										

ZONE 4: LOSSIEMOUTH																	
4.1 Lossiemouth Town Centre																	
Convenience	Co-op	1	458	298	£8,671 psm	89%	£2.58m							458	298	£2.58m	
	Others	7	531	345	£4,022 psm	89%	£1.39m							531	345	£1.39m	
	Total Convenience	8	989	643			£3.97m							989	643	£3.97m	
General Comparison		11						882	573	£2,807 psm	94%	£1.61m		882	573	£1.61m	
Bulky Goods		0															
Services		35															
Vacant		1															
TOTAL		55	989	643			£3.97m	882	573			£1.61m	£0.00m	5356	1216	£5.58m	
4.2 Lossiemouth OOC																	
Convenience	Co-op	1	841	547	£9,851 psm	102%	£5.39m	93	61	£2,638 psm	106%	£0.16m		935	608	£5.55m	
General Comparison		1											79	51	£1,036 psm	83%	
Bulky Goods		1															
Services		7												79	51	£0.05m	
Vacant		1												471			
TOTAL		9	841	547			£5.39m	93	61			£0.16m	£0.05m	1485	659	£5.60m	
4.3 Other Rural Zone 4																	
Convenience		1														155	
General Comparison		1															
Bulky Goods		1															
Services		1															
Vacant		1															
TOTAL		1														155	
Other Zone 4							£5.39m					£0.16m	£0.05m				
TOTAL ZONE 4		65	1830.514	1190			£9.36m	976	634			£1.77m	£0.05m	6995	1875	£11.18m	
ZONE 5: SPEYSIDE AND GLENLIVET																	
5.1 Aberlour																	
Convenience	Co-op	1	330	215	£7,104 psm	73%	£1.53m							330	215	£1.53m	
	Others	5	847	551	£2,746 psm	73%	£1.51m							847	551	£1.51m	
	Total Convenience	6	1178	765			£3.04m							1178	765	£3.04m	
General Comparison		4						366	238	£3,781 psm	126%	£0.90m		366	238	£0.90m	
Bulky Goods		1											66	43	£1,267 psm	84%	
Services		7												66	43	£0.05m	
Vacant		2												480	133		
TOTAL		20	1178	765			£3.04m	366	238			£0.90m	£0.05m	2223	1046	£3.99m	
5.2 Dufftown																	
Convenience	Co-op	1	353	230	£7,452 psm	77%	£1.71m							353	230	£1.71m	
	Others	4	253	164	£2,881 psm	77%	£0.47m							253	164	£0.47m	
	Total Convenience	5	606	394			£2.18m							606	394	£2.18m	
General Comparison		5						282	184	£2,196 psm	73%	£0.40m		282	184	£0.40m	
Bulky Goods		1											87	57	£1,449 psm	97%	
Services		19												87	57	£0.08m	
Vacant		5												1426	324		
TOTAL		35	606	394			£2.18m	282	184			£0.40m	£0.08m	2725	634	£2.67m	
5.3 Rothes																	
Convenience		3	407	264	£3,665 psm	98%	£0.97m							407	264	£0.97m	
General Comparison		2						109	71	£3,284 psm	109%	£0.23m		109	71	£0.23m	
Bulky Goods		1											107	69	£1,574 psm	105%	
Services		8												107	69	£0.11m	
Vacant		1												480			
TOTAL		14	407	264			£0.97m	109	71			£0.23m	£0.11m	1103	405	£1.31m	
5.4 Tomintoul																	
Convenience		2	330	215	£3,471 psm	93%	£0.74m							330	215	£0.74m	
General Comparison		1						190	124	£1,542 psm	62%	£0.19m		190	124	£0.19m	
Bulky Goods		1															
Services		3															
Vacant		1															
TOTAL		6	330	215			£0.74m	190	124			£0.19m		992	338	£0.94m	
5.5 Other Rural																	
Convenience	Co-op	2	75	48	£8,979 psm	93%	£0.44m							75	48	£0.44m	
General Comparison		2						42	28	£1,542 psm	62%	£0.04m		42	28	£0.04m	
Bulky Goods		2															
Services		2															
Vacant		1															
TOTAL		6	75	48			£0.44m	42	28			£0.04m		251	76	£0.48m	
Other Zone 5							£1.18m					£0.23m	£0.00m				
TOTAL ZONE 5		81	2595	1687			£7.37m	990	643			£1.77m	£0.25m	7294	2499	£9.39m	
ZONE 6: KEITH																	
6.1 Keith Town Centre (Total)																	
Convenience		12	1497	973	£2,919 psm	65%	£2.84m							1497	973	£2.84m	
General Comparison		21						2608	1695	£3,236 psm	92%	£5.49m		1443	1082	£2.423 psm	138%
Bulky Goods		3												1443	1082	£2.62m	
Services		37												3851	1925		
Vacant		12															
TOTAL		85	1497	973			£2.84m	2608	1695			£5.49m	£2.62m	11324	3751	£10.95m	
6.2 Keith OOC																	
Convenience	Tesco	1	2369	1540	£9,790 psm	72%	£15.08m	1015	660	£7,187 psm	81%	£4.74m		3385	2200	£19.82m	
	Pounstretcher	1	134	100	£2,523 psm	72%	£0.25m	1205	904	£2,820 psm	81%	£2.55m		1339	1004	£2.80m	
	Total Convenience	2	2503	1641			£15.33m	2221	1564			£7.29m	£0.00m	4724	3205	£22.62m	
General Comparison		2															
Bulky Goods		2															
Services		2															
Vacant		1															
TOTAL		5	131	85			£0.18m					£0.00m	£0.00m	377	85	£0.18m	
TOTAL ZONE 6		92	4132	2699			£18.36m	4828	3259			£12.78m	£2.62m	16425	7041	£33.76m	
ZONE 7: BUCKIE																	
7.1 Buckie Town Centre																	
Convenience	Co-op	1	729	474	£8,982 psm	93%	£4.26m	81	53	£5,782 psm	91%	£0.30m		810	527	£4.56m	
	Lidl	1	1393	1093	£6,852 psm	93%	£7.49m	246	193	£6,787 psm	91%	£1.31m		1639	1286	£8.80m	
	Others	10	1291	839	£4,166 psm	93%	£3.50m							1291	839	£3.50m	
	Total Convenience	12	3413	2406			£15.24m					£1.61m		3740	2652	£16.86m	
General Comparison	Orig Factory Shop	1						327	246	£3,177 psm	91%	£1.76m		82	62	£1,845 psm	105%
	M&Co	1						740	555	£3,177 psm	91%	£1.76m		822	617	£1.88m	
	Others	21						1002	651	£1,189 psm	91%	£0.77m		1002	651	£0.77m	
	Total Comparison	23						4653.01	3098			£8.55m		2911	1892	£6.01m	
Bulky Goods		4											82	62	£1,845 psm	105%	
Services		41												1100	715	£1.32m	
Vacant		6												4735	3160	£8.66m	
TOTAL		86	3413	2406			£15.24m	4980	3344			£10.16m	£1.43m	14992	6527	£26.84m	
7.2 Buckie OOC																	
Convenience	Tesco	1	1732	1299	£12,227 psm	90%	£15.89m	742	557	£6,842 psm	77%	£3.81m		2475	1856	£19.70m	
	Others	8	1354	880	£3,376 psm	90%	£2.97m							13			

**TABLE 18: FLOORSPACE AND TURNOVER 2025
2019 Prices**

	No.	Convenience					General Comparison					Bulk Goods					All Goods			
		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	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	£11,973 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%	£6.31m											2076	1245	£6.31m
	Total Conv	16	10293	6585	£61.50m		£61.50m	4206	2692	£5,337 psm	95%	£23.57m	989	631	£6,777 psm	115%	£4.28m	15488	9907	£89.35m
General Comparison		73						19689	11814	£5,337 psm	95%	£63.05m						19689	11814	£63.05m
Bulky Goods		9											3454	2763	£3,215 psm	115%	£8.88m	3454	2763	£8.88m
Services		142																17460	6546	
Vacant		32																6546		
TOTAL		272	10293	6585	£61.50m		£61.50m	23895	14505	£86.62m		£86.62m	4443	3394	£13.16m		£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	5939	£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
	Total Conv	3	7025	4270	£44.40m		£44.40m	4319	2375	£12,479 psm	143%	£29.64m	1080	594	£7,748 psm	136%	£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%	£8.36m						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		£1.87m	8946	6710	£37.27m		£37.27m	4238	3178	£2,065 psm	136%	£6.56m	4238	3178	£6.56m
Bulky Goods	B&Q	1											529	397	£2,065 psm	136%	£0.82m	529	397	£0.82m
	Dreams	1											717	538	£1,752 psm	136%	£0.94m	717	538	£0.94m
	Platts @Home	1											637	478	£3,519 psm	136%	£1.68m	637	478	£1.68m
	Carpetright	1											875	656	£1,519 psm	136%	£1.00m	875	656	£1.00m
	Tapl	1											1406	1055	£14,983 psm	136%	£15.80m	1406	1055	£15.80m
	Currys	1											479	359	£14,983 psm	136%	£5.38m	479	359	£5.38m
	Bensons	1											8881	6661	£32.19m		£32.19m	8881	6661	£32.19m
	Total BG	7											706	2533			706	2533		
Services		2																		
Vacant		4																		
TOTAL EDGAR ROAD AREA		24	7363	4524	£46.27m		£46.27m	13266	9085	£66.92m		£66.92m	9961	7255	£0 psm		£36.79m	33828	20864	£149.98m
1.3 Local Centres/Parades																				
Convenience	Scotmid	1	274	178	£8,477 psm	90%	£1.51m											274	178	£1.51m
General Comparison		2						254	165	£2,122 psm	92%	£0.35m						254	165	£0.35m
Bulky Goods		14																628		
Services		7																		
Vacant																				
TOTAL		10	274	178	£1.51m		£1.51m	254	165	£0.35m		£0.35m						1156	343	£1.86m
Glen Moray Drive																				
Convenience		1	263	171	£3,277 psm	90%	£0.58m											263	171	£0.58m
Gen Comp		1											62	40	£1,401 psm	110%	£0.06m	62	40	£0.06m
Bulky Goods		1																176		
Services		3																237		
Vacant																				
TOTAL		5	263	171	£0.56m		£0.56m						62	40	£0.06m		£0.06m	738	211	£0.62m
Hermes Road																				
Convenience		1																40	26	£0.04m
Gen Comp		1																40	26	£0.04m
Bulky Goods		3																234		
Services																				
Vacant																				
TOTAL		4											40	26	£0.04m		£0.04m	274	26	£0.04m
New Elgin																				
Convenience		1	47	30	£3,277 psm	90%	£0.10m											47	30	£0.10m
Gen Comp		1																		
Bulky Goods		6																289		
Services		4																159		
Vacant																				
TOTAL		11	47	30	£0.10m		£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											112	73	£0.24m
Bulky Goods		2						218	142	£2,122 psm	92%	£0.30m						218	142	£0.30m
Services		2											422	274	£1,401 psm	110%	£0.38m	422	274	£0.38m
Vacant		2																302		
TOTAL		8	495	321	£2.35m		£2.35m	218	142	£0.30m		£0.30m	422	274	£0.38m		£0.38m	1436	737	£0.30m
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
	Total Conv	5	1773	1328	£7.84m		£7.84m	249	193	£1.36m		£1.36m						2022	1355	£9.20m
General Comparison		1						489	391	£1,189 psm	92%	£0.46m	4397	3518	£1,413 psm	110%	£4.97m	4886	3908	£5.44m
Bulky Goods	Decora	1											2905	2321	£1,413 psm	110%	£3.28m	2905	2321	£3.28m
	Grampian Furnishers	1																		

ZONE 4: LOSSIEMOUTH														
4.1 Lossiemouth Town Centre														
Convenience	1	458	298	£8,336 psm	88%	£2.48m						458	298	£2.48m
Others	7	531	345	£3,867 psm	88%	£1.34m						531	345	£1.34m
Total Convenience	8	989	643			£3.82m						989	643	£3.82m
General Comparison	11						882	573	£3,073 psm	100%	£1.76m	882	573	£1.76m
Bulky Goods	0													
Services	35													
Vacant	1													
TOTAL	55	989	643			£3.82m	882	573			£1.76m	5356	1216	£5.58m
4.2 Lossiemouth OOC														
Convenience	1	841	547	£9,467 psm	100%	£5.18m	93	61	£2,883 psm	113%	£0.18m	935	608	£5.35m
General Comparison	1													
Bulky Goods	1													
Services	7													
Vacant	1													
TOTAL	9	841	547			£5.18m	93	61			£0.18m	1485	659	£5.41m
4.3 Other Rural Zone 4														
Convenience	1													
General Comparison	1													
Bulky Goods	1													
Services	1													
Vacant	1													
TOTAL	1													155
Other Zone 4						£5.18m					£0.18m			
TOTAL ZONE 4	65	1830.51	1190			£8.99m	976	634			£1.94m	79	51	£0.06m
ZONE 5: SPEYSIDE AND GLENLIVET														
5.1 Aberlour														
Convenience	1	330	215	£6,915 psm	73%	£1.49m						330	215	£1.49m
Others	5	847	551	£2,673 psm	73%	£1.47m						847	551	£1.47m
Total Convenience	6	1178	765			£2.96m						1178	765	£2.96m
General Comparison	4						366	238	£4,139 psm	135%	£0.98m	366	238	£0.98m
Bulky Goods	7													
Services	1													
Vacant	2													
TOTAL	20	1178	765			£2.96m	366	238			£0.98m	66	43	£1,402 psm
Convenience	1	353	230	£7,237 psm	77%	£1.66m						353	230	£1.66m
Others	4	253	164	£2,797 psm	77%	£0.46m						253	164	£0.46m
Total Convenience	5	606	394			£2.12m						606	394	£2.12m
General Comparison	5						282	184	£2,411 psm	79%	£0.44m	282	184	£0.44m
Bulky Goods	1													
Services	19													
Vacant	5													
TOTAL	35	606	394			£2.12m	282	184			£0.44m	87	57	£1,603 psm
Convenience	3	407	264	£3,564 psm	98%	£0.94m	109	71	£3,634 psm	119%	£0.26m	407	264	£0.94m
General Comparison	2											109	71	£0.26m
Bulky Goods	1											107	69	£0.12m
Services	8											107	69	£0.12m
Vacant	1											480		
TOTAL	14	407	264			£0.94m	109	71			£0.26m	1103	405	£1.32m
Convenience	2	330	215	£3,379 psm	92%	£0.72m						330	215	£0.72m
General Comparison	1						190	124	£1,706 psm	67%	£0.21m	190	124	£0.21m
Bulky Goods	1													
Services	3													
Vacant	1													
TOTAL	6	330	215			£0.72m	190	124			£0.21m	992	338	£0.94m
Convenience	2	75	48	£8,740 psm	92%	£0.42m						75	48	£0.42m
General Comparison	2						42	28	£1,706 psm	67%	£0.05m	42	28	£0.05m
Bulky Goods	2													
Services	2													
Vacant	1													
TOTAL	6	75	48			£0.42m	42	28			£0.05m	251	76	£0.47m
Other Zone 5						£1.15m					£0.26m			
TOTAL ZONE 5	81	2595	1687			£7.17m	990	643			£1.94m	260	169	£0.27m
ZONE 6: KEITH														
6.1 Keith Town Centre (Total)														
Convenience	12	1497	973	£2,801 psm	64%	£2.73m	2608	1695	£3,542 psm	99%	£6.00m	1443	1082	£2,676 psm
General Comparison	21											1497	973	£2.73m
Bulky Goods	3											2608	1695	£6.00m
Services	37											1443	1082	£2.90m
Vacant	12											385	1925	
TOTAL	85	1497	973			£2.73m	2608	1695			£6.00m	1443	1082	£2.90m
Convenience	1	2369	1540	£9,397 psm	71%	£14.47m	1015	660	£7,891 psm	87%	£5.21m	3385	2200	£19.68m
General Comparison	1	134	100	£2,535 psm	71%	£0.25m	1205	904	£3,097 psm	87%	£2.80m	1339	1004	£3.05m
Bulky Goods	1													
Services	1													
Vacant	1													
TOTAL	2	2503	1641			£14.73m	2221	1564			£8.01m	4724	3205	£22.74m
Convenience	2	131	85	£2,052 psm	56%	£0.17m						131	85	£0.17m
General Comparison	2													
Bulky Goods	2													
Services	2													
Vacant	1													
TOTAL	5	131	85			£0.17m					£0.00m	377	85	£0.17m
Other Zone 6						£17.63m					£4.82m			
TOTAL ZONE 6	92	4132	2699			£17.63m	4828	3259			£14.01m	1443	1082	£2.90m
ZONE 7: BUCKIE														
7.1 Buckie Town Centre														
Convenience	1	729	474	£8,702 psm	92%	£4.12m	81	53	£6,373 psm	98%	£0.34m	810	527	£4.46m
Others	1	1393	1093	£6,639 psm	92%	£7.26m	246	193	£7,480 psm	98%	£1.44m	1639	1286	£8.70m
General Comparison	10	1291	839	£4,036 psm	92%	£3.38m						1291	839	£3.38m
Orig Factory Shop	1	3413	2406			£14.77m	327	246	£3,502 psm	98%	£1.78m	3740	2652	£16.55m
M&Co	1						740	555	£3,502 psm	98%	£1.94m	822	617	£2.07m
Others	21						1002	651	£1,311 psm	98%	£0.85m	1002	651	£0.85m
Bulky Goods	4						2911	1892	£3,502 psm	98%	£6.63m	2911	1892	£6.63m
Services	41						4653.01	3098			£9.42m	4735	3160	£9.55m
Vacant	6											1100	715	£1.46m
TOTAL	86	3413	2406			£14.77m	4980	3344			£11.20m	1182	777	£1.58m
Convenience	1	1732	1299	£11,847 psm	90%	£15.39m	742	557	£7,588 psm	83%	£4.23m	2475	1856	£19.62m
Others	8	1354	880	£3,271 psm	90%	£2.88m						1354	880	£2.88m
General Comparison	9	3086	2179			£18.27m	742	557	£2,127 psm	83%	£0.30m	3829	2736	£22.50m
Bulky Goods	2						221	143	£2,127 psm	83%	£0.30m	221	143	£0.30m
Services	9											39	25	£0.03m
Vacant	3											39	25	£0.03m
TOTAL	26	3086	2179			£18.27m	963	700			£4.53m	39	25	£0.03m
Convenience	1	264	172	£8,183 psm	87%	£1.40m						264	172	£1.40m
Others	2	217	141	£3,163 psm	87%	£0.45m						217	141	£0.45m
General Comparison	3	481	312			£1.85m						481	312	£1.85m
Services	13						1326	862	£2,261 psm	89%</				

**TABLE 19: FLOORSPACE AND TURNOVER 2030
2019 Prices**

	No.	Convenience					General Comparison					Bulky Goods					All Goods		
		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	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	£65.28m
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	£5,650 psm	98%	£24.96m	989	631			£4.63m	15488	9907	£90.64m
General Comparison	73						19689	11814	£5,650 psm	98%	£66.75m						19689	11814	£66.75m
Bulky Goods	9											3454	2763	£3,481 psm	121%	£9.62m	3454	2763	£9.62m
Services	142																17460	6546	£9.62m
Vacant	32																		
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	£13,180 psm	147%	£31.31m	1080	594			£4.98m	12424	7239	£80.13m
General Comparison	1						794	595	£4,487 psm	147%	£2.67m						794	595	£2.67m
Next	1						1946	1459	£2,780 psm	147%	£4.03m						1946	1459	£4.03m
Matalan	1						789	592	£11,357 psm	147%	£6.72m						1127	845	£8.67m
Home Bargains	1	338	254	£7,697 psm	100%	£1.95m											804	603	£2.66m
New Look	1						804	603	£4,410 psm	147%	£2.66m						651	488	£4.50m
Boots	1						651	488	£9,219 psm	147%	£4.50m						581	436	£4.01m
JD Sports	1						581	436	£9,209 psm	147%	£4.01m						2474	1855	£10.22m
B&M	1						2474	1855	£5,510 psm	147%	£10.22m						909	682	£4.55m
Sports Direct	1						909	682	£6,681 psm	147%	£4.55m						9285	6963	£41.31m
Total G Comp	8	338	254			£1.95m	8946	6710			£39.36m	4238	3178	£2,235 psm	144%	£7.10m	4238	3178	£7.10m
Bulky Goods	1											529	397	£2,235 psm	144%	£0.89m	529	397	£0.89m
B&Q	1											717	538	£1,897 psm	144%	£1.02m	717	538	£1.02m
Dreams	1											637	478	£3,808 psm	144%	£1.82m	637	478	£1.82m
Pets @Home	1											875	656	£1,644 psm	144%	£1.08m	875	656	£1.08m
Carpetright	1											1406	1055	£16,217 psm	144%	£17.10m	1406	1055	£17.10m
Tapl	1											479	359	£16,217 psm	144%	£5.83m	479	359	£5.83m
Currys	1											8881	6661			£34.84m	8881	6661	£34.84m
Bensons	1																706	2533	
Total BG	7																		
Services	2																		
Vacant	4																		
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	1	274	178	£8,422 psm	92%	£1.50m													
General Comparison	2						254	165	£2,366 psm	101%	£0.39m								
Bulky Goods	14																		
Services	7																		
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%	£0.58m													
Gen Comp	1											62	40	£1,557 psm	119%	£0.06m			
Bulky Goods	1																		
Services	3																		
Vacant																			
TOTAL	5	263	171			£0.56m						62	40			£0.06m	738	211	£0.62m
Hermes Road																			
Convenience																			
Gen Comp	1											40	26	£1,557 psm	119%	£0.04m			
Bulky Goods	3																		
Services																			
Vacant																			
TOTAL	4											40	26			£0.04m	40	26	£0.04m
New Elgin																			
Convenience	1	47	30	£3,255 psm	92%	£0.10m													
Gen Comp	1																		
Bulky Goods	6																		
Services	4																		
Vacant																			
TOTAL	11	47	30			£0.10m											289	159	£0.10m
Southfield Drive																			
Convenience	1	383	249	£8,422 psm	92%	£2.10m													
Gen Comp	1	112	73	£3,255 psm	92%	£0.24m													
Bulky Goods	2						218	142	£2,366 psm	101%	£0.33m								
Services	2											422	274	£1,557 psm	119%	£0.43m			
Vacant	2																		
TOTAL	8	495	321			£2.33m	218	142			£0.33m	422	274			£0.43m	1436	737	£0.90m
1.4 Remainder Elgin																			
Convenience	1	1412	1093	£6,425 psm	92%	£7.02m	249	193	£7,862 psm	101%	£1.52m								
Others	4	361	235	£3,255 psm	92%	£0.76m													
Total Convenience	5	1773	1328			£7.79m	249	193			£1.52m						1661	1286	£8.54m
General Comparison																			
Bulky Goods	1						489	391	£1,326 psm	101%	£0.52m	4397	3518	£1,571 psm	119%	£5.53m	4886	3908	£6.04m
Decorra	1											2905	2321	£1,571 psm	119%	£3.65m	2905	2321	£3.65m
Grampian Furnishers	1											145	94	£1,557 psm	119%	£0.15m	145	94	£0.15m
Others	1											7446	5933			£9.32m	7935	6323	£9

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	1										79	51	£1,252 psm	96%	£0.06m		
Bulky Goods	1										79	51	£0.06m				
Services	7										471						
Vacant	1																
TOTAL	9	841	547			£5.11m	93	61			£0.19m	1485	659	£5.37m			
4.3 Other Rural Zone 4																	
Convenience	1													155			
General Comparison	1																
Bulky Goods	1																
Services	1																
Vacant	1																
TOTAL	1													155			
Other Zone 4						£5.11m					£0.19m			£0.06m			
TOTAL ZONE 4	65	1830.51	1190			£8.88m	976	634			£2.12m	79	51	£0.06m	6995	1875	£11.07m
ZONE 5: SPEYSIDE AND GLENLIVET																	
5.1 Aberlour																	
Convenience	1	330	215	£6,772 psm	74%	£1.45m						330	215	£1.45m			
Others	5	847	551	£2,618 psm	74%	£1.44m						847	551	£1.44m			
Total Convenience	6	1178	765			£2.90m						1178	765	£2.90m			
General Comparison	4						366	238	£4,603 psm	147%	£1.09m	366	238	£1.09m			
Bulky Goods	1										66	43	£1,532 psm	98%	£0.07m		
Services	7										66	43	£0.07m				
Vacant	2										480						
1											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			
Others	4	253	164	£2,732 psm	77%	£0.45m						253	164	£0.45m			
Total Convenience	5	606	394			£2.07m						606	394	£2.07m			
General Comparison	5						282	184	£2,668 psm	85%	£0.49m	282	184	£0.49m			
Bulky Goods	1										87	57	£1,751 psm	112%	£0.10m		
Services	19										282	87	£0.10m				
Vacant	5										1426						
1											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	£1,903 psm	121%	£0.13m		
Services	8										107	69	£0.13m				
Vacant	1										480						
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						330	215	£0.71m			
General Comparison	1						190	124	£1,864 psm	71%	£0.23m	190	124	£0.23m			
Bulky Goods	1																
Services	3										472						
Vacant	1																
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						75	48	£0.42m			
General Comparison	2						42	28	£1,864 psm	71%	£0.05m	42	28	£0.05m			
Bulky Goods	2																
Services	2										134						
Vacant	1																
TOTAL	6	75	48			£0.42m	42	28			£0.05m	251	76	£0.47m			
Other Zone 5						£1.13m					£0.28m			£0.00m			
TOTAL ZONE 5	81	2595	1687			£7.02m	990	643			£2.15m	260	169	£0.30m	7294	2499	£9.46m
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	1443	1082	£2,934 psm	100%	£3.18m	
General Comparison	21											1497	973	£2.63m			
Bulky Goods	3											2608	1695	£6.51m			
Services	37											1443	1082	£3.18m			
Vacant	12											3851					
TOTAL	85	1497	973			£2.63m	2608	1695			£6.51m	1443	1082			£3.18m	
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	1																
Services	1																
Vacant	1																
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	1																
Bulky Goods	1																
Services	2											196					
Vacant	1											50					
TOTAL	5	131	85			£0.17m					£0.00m	377	85	£0.17m			
Other Zone 6						£17.04m	4828	3259			£15.17m	1443	1082	£3.18m	16425	7041	£35.38m
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			
Others	1	1393	1093	£6,594 psm	94%	£7.21m	246	193	£8,328 psm	106%	£1.61m	1639	1286	£8.81m			
General Comparison	10											1291	839	£3.36m			
Orig Factory Shop	1	3413	2406	£4,009 psm	94%	£3.36m	327	246	£3,898 psm	106%	£2.16m	3740	2652	£16.65m			
M&Co	1						740	555	£3,898 psm	106%	£2.16m	822	617	£2.30m			
Others	21						1002	651	£1,459 psm	106%	£0.95m	1002	651	£0.95m			
General Comparison	23						2911	1892	£3,898 psm	106%	£7.38m	2911	1892	£7.38m			
Bulky Goods	4						4653.01	3098			£10.49m	4735	3160	£10.63m			
Services	41										1100	715	£1.62m				
Vacant	6										4693						
TOTAL	86	3413	2406			£14.67m	4980	3344			£12.47m	1182	777	£1.76m	14992	6527	£28.90m
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			
Others	8	1354	880	£3,251 psm	92%	£2.86m						1354	880	£2.86m			
General Comparison	9						742	557	£8,408 psm	90%	£4.68m	3829	2736	£22.84m			
Bulky Goods	2						221	143	£2,357 psm	90%	£0.34m	221	143	£0.34m			
Services	9										39	25	£0.03m				
Vacant	3										39	25	£0.03m				
TOTAL	26	3086	2179			£18.16m	963										

TABLE 20: FLOORSPACE AND TURNOVER 2035
2019 Prices

Zone	No.	Convenience					General Comparison					Bulk Goods					All Goods			
		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	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	£11,877 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	173	121	£13,754 psm	103%	£1.66m						1151	806	£9.05m
	M&S Foodhall	1	1481	889	£7,927 psm	96%	£7.04m	78	47	£6,566 psm	103%	£0.31m						1559	935	£7.35m
	Farmfoods	1	815	611	£4,650 psm	96%	£2.84m											815	611	£2.84m
	Remainder	12	2076	1245	£5,028 psm	96%	£6.26m											2076	1245	£6.26m
	Total Conv	16	10293	6585			£61.01m	4206	2692			£26.80m	989	631				15488	9907	£92.90m
General Comparison		73						19689	11814	£6,067 psm	103%	£71.68m	3454	2763	£3,824 psm	130%	£10.57m	19689	11814	£71.68m
Bulky Goods		9																3454	2763	£10.57m
Services		142																17460	6546	
Vacant		32																		
TOTAL		272	10293	6585			£61.01m	23895	14505			£98.48m	4443	3394				62637	24484	£175.14m
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											948	759	£5.07m
	Other	1	678	542	£4,202 psm	102%	£2.28m											678	542	£2.28m
	Total Conv	3	7025	4270			£43.57m	4319	2375			£33.53m	1080	594				12424	7239	£82.56m
General Comparison	Next	1						794	595	£4,806 psm	153%	£2.89m						794	595	£2.89m
	Matalan	1						1946	1459	£2,956 psm	153%	£4.31m						1946	1459	£4.31m
	Home Bargains	1	338	254	£8,009 psm	102%	£2.05m	789	592	£12,164 psm	153%	£7.20m						1127	845	£9.25m
	New Look	1						804	603	£4,723 psm	153%	£2.85m						804	603	£2.85m
	Boots	1						651	488	£9,874 psm	153%	£4.82m						651	488	£4.82m
	JD Sports	1						581	436	£9,863 psm	153%	£4.30m						581	436	£4.30m
	B&M	1						2474	1855	£5,902 psm	153%	£10.95m						2474	1855	£10.95m
	Sports Direct	1						909	682	£7,156 psm	153%	£4.88m						909	682	£4.88m
	Total G Comp	8	338	254			£2.05m	8946	6710			£42.16m	4238	3178				4238	3178	£7.79m
Bulky Goods	B&Q	1											529	397	£2,452 psm	154%	£7.97m	4238	3178	£7.79m
	Dreams	1											717	538	£2,081 psm	154%	£11.2m	529	397	£9.97m
	Pets @Home	1											637	478	£4,179 psm	154%	£2.00m	717	538	£11.2m
	Carpetright	1											875	656	£1,804 psm	154%	£1.18m	637	478	£2.00m
	Tapl	1											1406	1055	£17,794 psm	154%	£18.77m	875	656	£1.18m
	Currys	1											479	359	£17,794 psm	154%	£6.39m	1406	1055	£18.77m
	Bensons	1											8881	6661				479	359	£6.39m
	Total BG	7																8881	6661	£38.23m
Services		2																706		
Vacant		4																2533		
TOTAL EDGAR ROAD AREA		24	7363	4524			£45.62m	13266	9085			£75.69m	9961	7255	£0 psm			33828	20864	£165.01m
1.3 Local Centres/Parades																				
Convenience	Scotmid	1	274	178	£8,444 psm	95%	£1.50m											274	178	£1.50m
General Comparison		2						254	165	£2,664 psm	110%	£0.44m						254	165	£0.44m
Bulky Goods		14																		
Services		7																628		
Vacant																				
TOTAL		10	274	178			£1.50m	254	165			£0.44m						1156	343	£1.94m
Glen Moray Drive																				
Convenience		1	263	171	£3,264 psm	95%	£0.58m											263	171	£0.58m
Gen Comp		1																62	40	£0.07m
Bulky Goods		3																62	40	£0.07m
Services																		176		
Vacant																		237		
TOTAL		5	263	171			£0.58m						62	40				738	211	£0.63m
Hermes Road																				
Convenience																				
Gen Comp		1																40	26	£0.05m
Bulky Goods		3																40	26	£0.05m
Services																		234		
Vacant																				
TOTAL		4											40	26				274	26	£0.05m
New Elgin																				
Convenience		1	47	30	£3,264 psm	95%	£0.10m											47	30	£0.10m
Gen Comp																				
Bulky Goods		6																		
Services		4																289		
Vacant																		159		
TOTAL		11	47	30			£0.10m											494	30	£0.10m
Southfield Drive																				
Convenience	Scotmid	1	383	249	£8,444 psm	95%	£2.10m											383	249	£2.10m
Gen Comp		1	112	73	£3,264 psm	95%	£0.24m											112	73	£0.24m
Bulky Goods		2						218	142	£2,664 psm	110%	£0.38m						218	142	£0.38m
Services		2																422	274	£1,756 psm
Vacant		2																302		£0.48m
TOTAL		8	495	321			£2.34m	218	142			£0.38m	422	274				1436	737	£3.20m
1.4 Remainder Elgin																				
Convenience	Lidl	1	1412	1093	£6,442 psm	95%	£7.04m	249	193	£8,853 psm	110%	£1.71m						1661	1286	£8.75m
	Others	4	361	235	£3,264 psm	95%	£0.77m											361	235	£0.77m
	Total Conv	5	1773	1328			£7.81m	249	193			£1.71m						2022	1255	£9.52m
General Comparison																				
Bulky Goods	Decora	1						489	391	£1,493 psm	110%	£0.58m	4397	3518	£1,771 psm	131%	£6.23m	4886	3908	£6.81m
	Grampian Furnishers	1											2905	2321	£1,771 psm	131%	£4.11m	2905	2321	£4.11m
	Others	1											145	94	£1,756 psm	131%	£0.17m	145	94	£0.17m
	Total BG	3						489	391			£0.58m	7446	5933				7935	6323	£11.09m
Services		13																		

ZONE 4: LOSSIEMOUTH															
4.1 Lossiemouth Town Centre		1	458	298	£8,125 psm	92%	£2.42m								
Convenience	Co-op	7	531	345	£3,769 psm	92%	£1.30m						458	298	£2.42m
Others													531	345	£1.30m
Total Convenience		8	989	643			£3.72m						989	643	£3.72m
General Comparison		11						882	573	£3,726 psm	116%	£2.14m	882	573	£2.14m
Bulky Goods		0													
Services		35													
Vacant		1													
TOTAL		55	989	643			£3.72m	882	573			£2.14m	5356	1216	£5.86m
4.2 Lossiemouth OOC															
Convenience	Co-op	1	841	547	£9,191 psm	104%	£5.03m	93	61	£3,546 psm	132%	£0.22m	935	608	£5.24m
General Comparison															
Bulky Goods		1											79	51	£0.07m
Services		7											471		£0.07m
Vacant															
TOTAL		9	841	547			£5.03m	93	61			£0.22m	79	51	£0.07m
4.3 Other Rural Zone 4															
Convenience		1													
General Comparison															
Bulky Goods		1													
Services		7													
Vacant															
TOTAL		1											155		
Other Zone 4							£5.03m					£0.22m			
TOTAL ZONE 4		65	1830.51	1190			£8.76m	976	634			£2.35m	79	51	£0.07m
ZONE 5: SPEYSIDE AND GLENLIVET															
5.1 Aberlour															
Convenience	Co-op	1	330	215	£6,629 psm	75%	£1.42m						330	215	£1.42m
Others		5	847	551	£2,563 psm	75%	£1.41m						847	551	£1.41m
Total Convenience		6	1178	765			£2.83m						1178	765	£2.83m
General Comparison		4						366	238	£5,125 psm	159%	£1.22m			
Bulky Goods		7													
Services		1								66	43	£1,690 psm	105%	£0.07m	
Vacant		2													
TOTAL		20	1178	765			£2.83m	366	238			£1.22m	66	43	£0.07m
5.2 Dufftown															
Convenience	Co-op	1	353	230	£6,904 psm	78%	£1.59m						353	230	£1.59m
Others		4	253	164	£2,669 psm	78%	£0.44m						253	164	£0.44m
Total Convenience		5	606	394			£2.02m						606	394	£2.02m
General Comparison		5						282	184	£2,964 psm	92%	£0.54m			
Bulky Goods		1													
Services		19								87	57	£1,932 psm	120%	£0.11m	
Vacant		5													
TOTAL		35	606	394			£2.02m	282	184			£0.54m	87	57	£0.11m
5.3 Rothes															
Convenience		3	407	264	£3,408 psm	99%	£0.90m	109	71	£4,381 psm	136%	£0.31m			
General Comparison		2													
Bulky Goods		1													
Services		8								107	69	£2,100 psm	131%	£0.15m	
Vacant															
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								
General Comparison		1						190	124	£2,057 psm	77%	£0.25m			
Bulky Goods		1													
Services		3													
Vacant															
TOTAL		6	330	215			£0.70m	190	124			£0.25m			
5.5 Other Rural															
Convenience	Co-op	2	75	48	£8,381 psm	95%	£0.41m								
General Comparison		2						42	28	£2,057 psm	77%	£0.06m			
Bulky Goods		2													
Services		2													
Vacant															
TOTAL		6	75	48			£0.41m	42	28			£0.06m			
Other Zone 5							£1.10m					£0.31m			
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		12	1497	973	£2,612 psm	64%	£2.54m	2608	1695	£4,214 psm	112%	£7.14m			
General Comparison		21													
Bulky Goods		3											1443	1082	£3,255 psm
Services		37											1443	1082	£3.52m
Vacant		12											3857	1925	
TOTAL		85	1497	973			£2.54m	2608	1695			£7.14m	1443	1082	£3.52m
6.2 Keith OOC															
Convenience	Tesco	1	2369	1540	£8,794 psm	71%	£13.54m	1015	660	£9,363 psm	98%	£6.18m			
General Comparison	Pounstretcher	1	134	100	£2,659 psm	71%	£0.27m	1205	904	£3,674 psm	98%	£3.32m			
Bulky Goods															
Services															
Vacant															
TOTAL		2	2503	1641			£13.81m	2221	1564			£9.50m			£19.72m
6.3 Other Rural															
Convenience		2	131	85	£1,910 psm	56%	£0.16m								
General Comparison															
Bulky Goods		2													
Services		1													
Vacant		1													
TOTAL		5	131	85			£0.16m					£0.00m			£0.16m
TOTAL ZONE 6		92	4132	2699			£16.52m	4828	3259			£16.64m	1443	1082	£3.52m
ZONE 7: BUCKIE															
7.1 Buckie Town Centre															
Convenience	Co-op	1	729	474	£8,571 psm	97%	£4.06m	81	53	£7,966 psm	117%	£0.42m			
Others	Lidl	1	1393	1093	£6,539 psm	97%	£7.15m	246	193	£9,350 psm	117%	£1.80m			
Total Convenience		10	1291	839	£3,976 psm	97%	£3.34m								
General Comparison		1	3413	2406			£14.55m	327	246			£2.22m			
Orig Factory Shop															
M&Co		21						740	555	£4,377 psm	117%	£2.43m	82	62	£2,544 psm
Others		2						1002	651	£1,638 psm	117%	£1.07m			
Total Comparison		23						2911	1892	£4,377 psm	117%	£8.28m	82	62	£1.82m
Bulky Goods		4						4653.01	3098			£11.78m	1100	715	£2,544 psm
Services		41													
Vacant		6													
TOTAL		86	3413	2406			£14.55m	4980	3344			£14.00m	1182	777	£1.98m
7.2 Buckie OOC															
Convenience	Tesco	1	1732	1299	£11,681 psm	94%	£15.18m	742	557	£9,406 psm	98%	£5.24m			
Others		8	1354	880	£3,225 psm	94%	£2.84m								
Total Convenience		9	3086	2179			£18.02m	742	557			£5.24m			
General Comparison		3						221	143	£2,637 psm	98%	£0.38m	39	25	£1,451 psm
Bulky Goods		2													
Services		9													
Vacant		3													
TOTAL		26	3086	2179			£18.02m	963							