Midlothian Local Development Plan
Main Issues Report 2013:
Technical Note

Retailing and Town Centres

Midlothian

Retailing and Town Centres Technical Note

1.1 Scottish Planning Policy (SPP) National policy stresses that town centres should be the focus for a diverse range of uses, including retail, leisure, entertainment, recreation, cultural and community uses as well as homes and businesses. Development plans should identify a network of centres. The network of centres may change over time, and significant changes to the network of centres should be addressed through development plans rather than being driven by individual applications. The development plan should enable gaps and deficiencies to be remedied by identifying locations for development. Commercial realities should be taken into account when plans are prepared. The development plan should assess how town centres can accommodate development, identify relevant opportunities, and provide the framework for town centre strategies.

1.2 The SPP sets out a sequential approach to selecting locations for development, unless the development plan identifies an exception. The order of priorities: is town centre; edge of town centre; other commercial centres identified in the development plan; and finally, out of centre locations that are or can be made easily accessible by a choice of transport modes.

1.3 Strategic Development Plan for Edinburgh and South East Scotland (SESplan) The Proposed Plan identifies a network of centres composed of four types of centre, viz. Regional Town Centres, Strategic Town Centres, Other Town Centres and Commercial Centres. There are no Regional Town Centres or Strategic Town Centres in Midlothian. Other Town Centres and Commercial Centres are to be identified in Local Development Plans (LDPs), including a clear definition of their roles. The importance of Edinburgh City Centre at the top of the network of centres is highlighted, and it has a role as the regional centre for the whole of the SESplan area. LDPs can assist in promoting and protecting town centres by promoting the sequential approach. Unless an exception is identified through the LDP and justified by rigorous analysis, priority should be in accordance with the sequential approach.

1.4 Town Centres The adopted Edinburgh and Lothians Structure Plan 2015 identifies three strategic town centres in Midlothian (at Bonnyrigg, Dalkeith and Penicuik), and a commercial centre at Straiton. In addition, the Midlothian Local Plan 2008 identifies a further five non-strategic town centres: at Gorebridge, Loanhead, Mayfield, Newtongrange, and Shawfair (proposed).

1.5 Town centre health checks were carried out on the strategic town centres (Bonnyrigg, Dalkeith and Penicuik) in 2011; a summary of the results is appended as Appendix 1. The health check revealed an overall score that was in excess of 60 out of 100 in all three centres, based on an aggregate assessment of physical condition and functionality indicators. Using data from the Lothian Joint Valuation Board, it is possible to consider the quantitative performance of the town centres, in terms of scale of retail space on offer, and vacancy rates. This information is set out in Appendix 2. The household survey carried out as part of the Midlothian Retail Study (refer to para 1.7 for more details on the study) considers the scale of trade at Midlothian's town centres. This matter is considered in greater detail from para 1.11, but it is evident that the Midlothian's town centres are in many cases undertrading, and taking a relatively small share of Midlothian's retail expenditure.

1.6 [1]SPP indicates that town centres should develop as foci for a range of uses, which contribute to their vibrancy. There is evidence in other studies, particularly the review into the future of the High Street carried out for the UK Government 'The Portas Review', that town centre health may be encouraged through a more liberal approach to the uses that may be permitted there. Midlothian Local Plan 2008 policy SHOP3 exercises control on changes from shop units to other uses in Bonnyrigg, Dalkeith and Midlothian. There is potential, through the Midlothian Local Development Plan (MLDP) Main Issues Report (MIR) process, to canvass views on a more liberalised policy, which would allow other uses which are aimed at visiting members of the public, while retaining control over changes of use to activities which would decrease the vibrancy of the area (for example converting shop units with street frontages to housing).

1.7 Midlothian Retail Study 2012 Midlothian Council commissioned a study of retail patterns in 2012, from RDPC Ltd, as an input to preparation of the MLDP. The Study is appended to this note under separate cover as Appendix 3.

1.8 Purpose: The study sought to establish the availability of retail expenditure which could support current and future retail development in Midlothian, up to 2021. 2021 was chosen as a reasonable end date for the projections due to the unpredictable nature of the variables.

1.9 Study Inputs: A household survey was carried out to ascertain current shopping patterns in the area – the household survey area was extended to include parts of Edinburgh and East Lothian. Additional work was undertaken to identify additional expenditure inflows into Midlothian. Population estimates were prepared, based on housing allocations and taking into account the strategic planning framework being laid down in the Proposed Strategic Development Plan for Edinburgh. The use of policy based population forecasts was important, as the National Records Service of Scotland (formerly General Register Office Scotland) projections are trend based, and do not reflect the substantial development commitments in Midlothian. The first results from the Scottish Census were published in December 2012 and suggest that there are slightly more people in Midlothian than previously estimated: if the Council's calculation of the number of dwellings is correct then the average number of people per dwellinghouse is more, which suggests that the Council's

[1] Convenience and Comparison shopping definition. Convenience goods are generally those goods which are purchased on a frequent basis, such as at a regular shopping trip to a supermarket. They are generally consumed or expire in a relatively short period after purchase. This category is normally thought to be comprised of: food and non-alcoholic beverages, alcoholic drink, tobacco, non-durable household goods; and newspapers & magazines.

Comparison Goods are generally purchased on a less frequent basis, after more deliberation and comparison and are not generally consumed in a relatively short period after purchase. This category is normally thought to be comprised of: books; clothing and footwear; furniture, floor coverings and household textiles; audio-visual equipment and other durable goods; hardware and DIY supplies; chemists goods; jewellery, watches and clocks; bicycles; and recreational and other miscellaneous goods.

population projections are conservative. Retail expenditure estimates to 2021, for convenience and comparison[*1] goods were acquired from Pitney Bowes Insight. Estimates of the current retail floorspace in Midlothian, were derived from the Lothian Joint Valuation Board (Assessors) records. A list of new retail projects with planning permission or at an advanced stage was also provided to the consultant, in order to model the likely stock of retail floorspace in 2021.

1.10 Methodology: Using population estimates and per capita expenditure estimates, the total expenditure in Midlothian was projected to 2021. The population and expenditure estimates were applied to the results of the household survey to gauge the pattern of expenditure distribution within, into and out of Midlothian. From this work, the performance and trade draw characteristics of shopping locations within Midlothian were derived, and the potential for additional floorspace was estimated.

1.11 Findings: An estimated surplus of convenience expenditure of around £39 million by 2021 was estimated. This would support additional floorspace in the convenience sector (above commitments already taken into account) of around 6,500 square metres (gross). This level of surplus equates to one or possibly two new superstores in the convenience sector. Sub-area analysis indicates that the potential lies primarily in the A7/A68/Borders Rail corridor; when the A7/A68 and Shawfair areas are examined together, the case for retail investment in this combined corridor is yet more evident.

1.12 An estimated surplus of comparison expenditure (assuming proportional flows of leakage and inflow remain constant) by 2021, is around £118 million. Given the uncertainty in the economy, an alternative scenario using lower growth rates was run (using a lower growth rate over the 9 year period than has ever been observed over the last 40 years). This resulted in a surplus of around £77 million by 2021. The development that this expenditure could support depends on whether it takes the form of mainstream or bulky goods retail space (sales per unit of area are lower with bulky goods development). Based on the main projection, around 39,000 square metres (gross) of additional 'mainstream' floorspace could be supported, or around 52,000 square metres if developed in bulky goods format. Based on the alternative scenario, around 26,000 square metres of 'mainstream' floorspace could be supported, or around 34,000 square metres if developed in bulky goods format.

1.13 This level of surplus equates to either a new shopping centre similar to the Gyle Centre or a retail park larger than Pentland Retail Park, although a combination of both types of development on a smaller scale would be a more realistic aspiration. In considering locations for development, Midlothian Council must consider where retailers are prepared to locate – in this regard Straiton has advantages as it is an established location, which may encourage others to invest. If the existing flows into the A701 Straiton area are maintained, this would be the likely focus for such development, but if these flows are discounted, the A7/A68 Corridor would seem the more appropriate location, as greater population growth is expected there. The likely emergence of a new centre at Shawfair, possibly after 2021, is another factor to be considered.

1.14 Matters for Main Issues Report (MIR), arising out of 2012 Retail Study In view of the study's findings with regard to convenience expenditure, it is suggested that the MIR should include a new superstore in the southern A7/A68 Corridor in the preferred development strategy. High growth is envisaged around Gorebridge, and this location maintains some distance from Dalkeith town centre. It is suggested that a 2nd superstore be located around Shawfair town centre, this might be only be needed towards the end of the MLDP period, depending on the rate of growth at Shawfair.

1.15 Although there is a greater population and more growth envisaged in the A7/A68 Corridor (compared to the A701 Corridor), expansion of the established Straiton shopping area to meet comparison shopping needs appears more deliverable. It is suggested that the MIR should include the western expansion of Straiton in the preferred development strategy. This could form part of a mixed use development including commercial leisure, business use, hotels and housing, and be linked to realignment of the A701. If the current A701 is relieved of its present traffic, there is potential for greater public transport, cycling and pedestrian priority – this would help integrate development on both sides of the road. Public transport between Straiton and eastern Midlothian is limited: obligations could be placed on large scale development to address this matter.

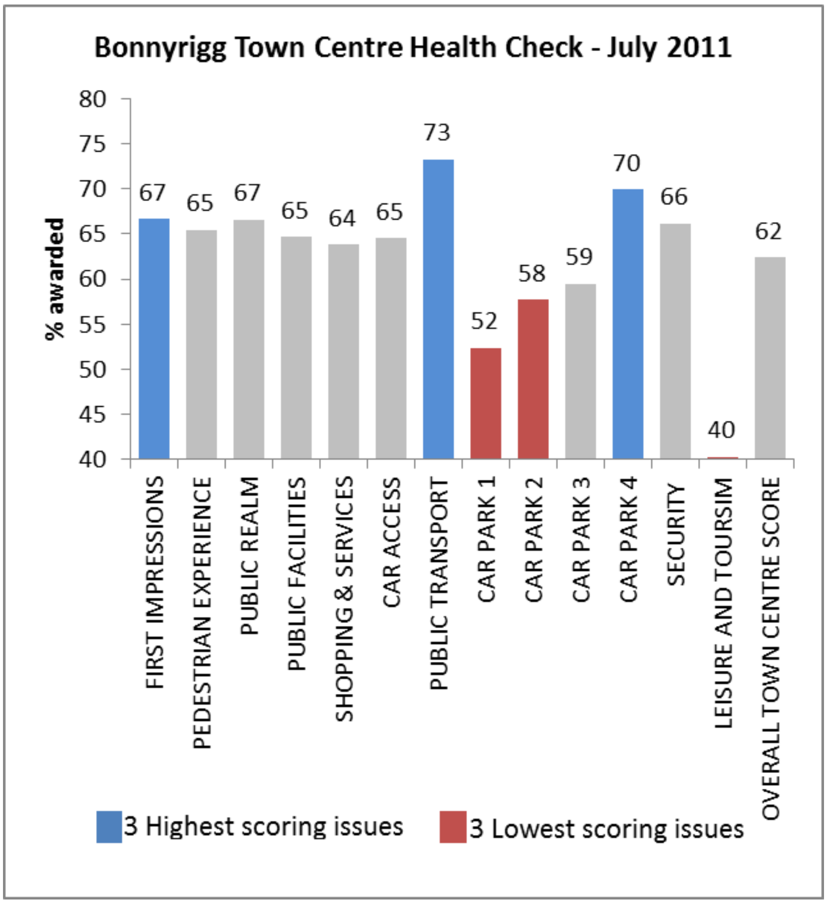
1.16 Further development in Dalkeith town centre could also help meet this demand, and it is expected that the MLDP will continue to support redevelopment of Dalkeith town centre, particularly the central triangle. Development of Shawfair town centre could form an alternative focus for growth in eastern Midlothian. There is merit in seeking views through the MIR on whether there are any new locations, that respondees consider may be established as alternatives for major retail development.

1.17 Conclusion National policy supported by town centre assessment suggests that a wider range of uses should be permitted in town centres. From quantitative assessment there appears to be a strong case for additional retail floorspace in Midlothian. This remains the case in the most cautious scenario, which assumes that the percentage leakage rate is unchanged and uses low expenditure growth rates.

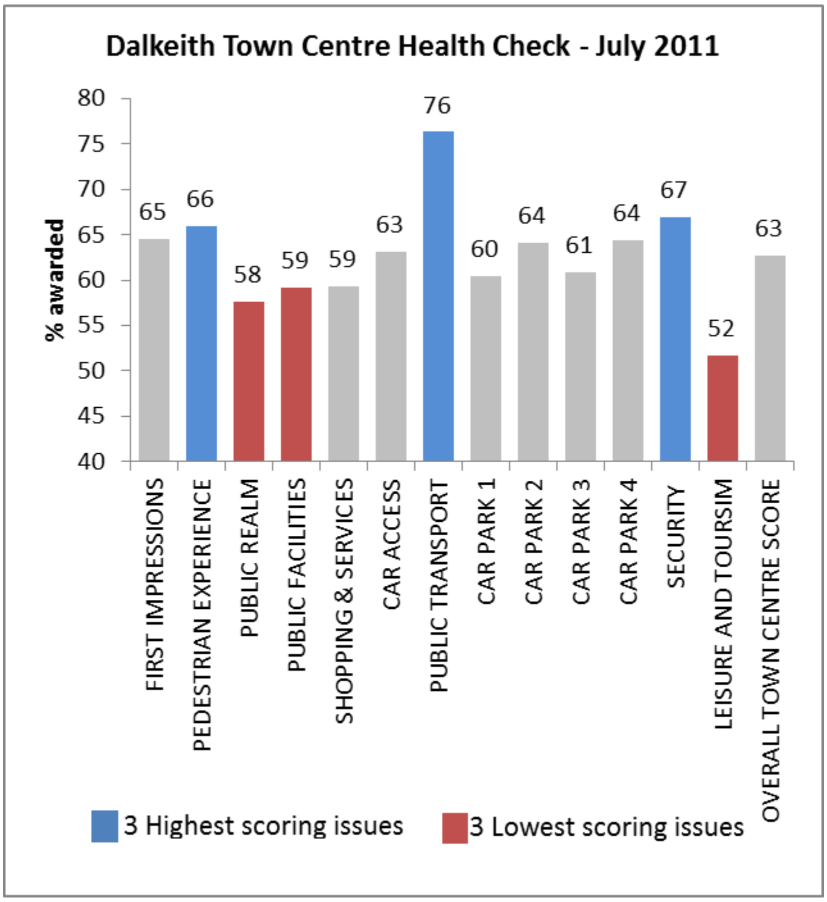
Appendix 1: Midlothian Town Centre Health Checks, 2011, Summary of Findings

Town centre health checks were carried out on the strategic town centres (Bonnyrigg, Dalkeith and Penicuik). These were carried out for the first time in 2011. Further assessments were carried out in 2012, although the survey results are not yet collated, so it is not possible at this stage to provide a time series of change over time.

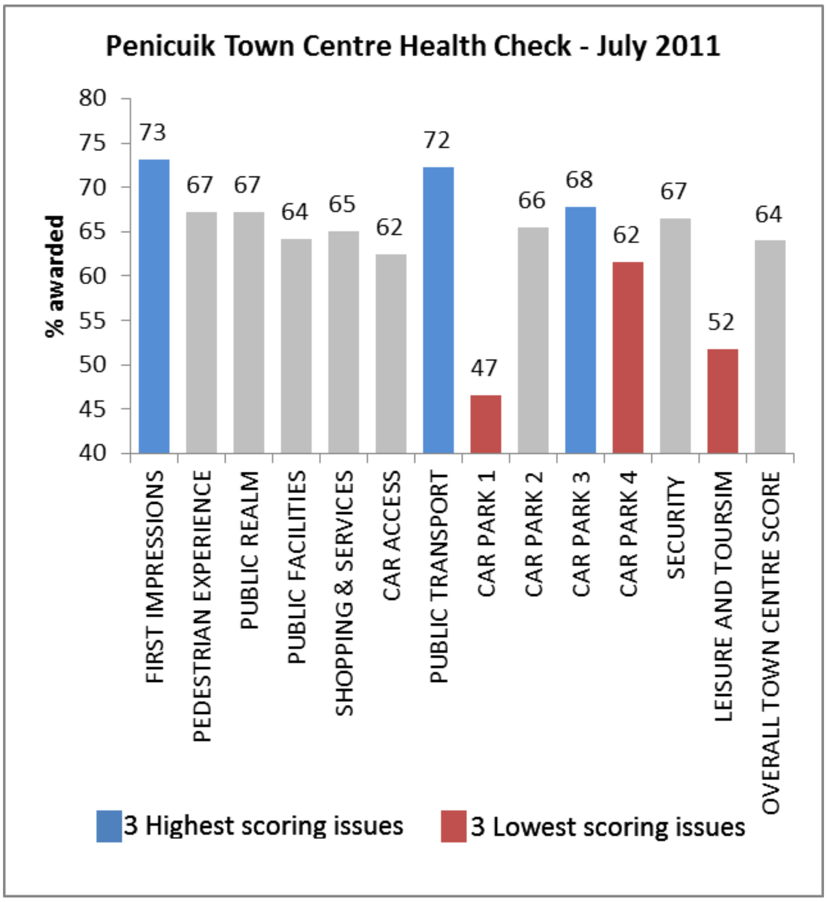
A panel of seven Council employees, from different disciplines and backgrounds, visited the town centres and awarded scores against a set of criteria. The results of the scoring exercise are recorded below.



Note: Bonnyrigg car park 1 is behind Polton Precinct, adjacent to public toilets; car park 2 is Campview, behind library; car park 3 is adjacent to Dentist; car park 4 is at new health centre.



Note: Dalkeith car park 1 is behind Post Office; car park 2 is bowling club; car park 3 is at North Wynd; car park 4 is at Lidl/St Andrews Street.



Penicuik car park 1 is Bank Street, adjacent to public toilets; car park 2 is at Lidl; car park 3 is at Kentigern Mall; car park 4 is at High Street.

The health checks identified common themes across Midlothian's strategic town centres. All three towns scored highly for public transport and the panel felt that this was an asset to each of the towns. Car parking was an issue noted by the panel in all three town centres.

In all three towns Leisure and Tourism scored low. It was noted by the panel that there were few activities for teenagers in the town centres.

In Dalkeith the 'Public Realm and Public Facilities' criterion score was low. When the assessments were undertaken in 2011, Dalkeith was in the midst of environmental improvement works. It is hoped that the work undertaken will have helped address this matter and created a more pleasant town centre environment. This improvement is expected to be reflected in the public realm scores in 2012.

Since the 2011 survey several retail units have closed in Penicuik, and this centre, which had the highest overall score of the three in 2011, may not have been assessed so positively in the 2012 assessment. However, environmental improvements have been implemented in Penicuik town centre also.

There do not appear to have been significant changes in Bonnyrigg between 2011 and 2012. Environmental improvements to the public realm were implemented in 2004/5.

In all towns the overall score was in excess of 60 (out of 100) – it is reasonable to conclude that the physical condition and functionality of these town centres was good, in 2011.

Appendix 2 Quantitative Background – Midlothian Town Centres

Using data from the Lothian Joint Valuation Board, it is possible to consider the relative status of the town centres, in terms of overall floorspace, composition and vacancy rates.

Strategic Town Centre or other Town Centre (in italics)	Operational Comparison and Convenience Floorspace*1	Other Class 1 retail*2	Vacant	'Narrow' Vacancy Rate*3	Other commercial uses including professional services and food & drink	'Broad' Vacancy Rate *4
Bonnyrigg	4899	352	99	2%	1254	1%
Dalkeith	9648	818	982	9%	3049	7%
Penicuik	5511	417	1147	16%	1968	13%
Gorebridge	757	125	93	10%	314	7%
Loanhead	1323	105	0	0%	1156	0%
Mayfield	1377	103	0	0%	385	0%
Newtongrange	2451	259	94	3%	529	3%

Units: square metres. Data refer to gross floorspace. Source: Lothian Joint Valuation Board and Midlothian Council.

*1: see note on page 2 after para 1.9 for definition of convenience and comparison shopping

*2: this grouping is mostly comprised of hairdressers, which do not fall into comparison or convenience categorisation

*3: denominator for narrow vacancy rate comprised of sum of operational comparison and convenience floorspace, other Class 1 retail, and vacant floorspace.

*4: denominator for 'broad' vacancy rate comprised of sum of operational comparison and convenience floorspace, other Class 1 retail, vacant floorspace and other commercial uses including professional services and food & drink.

Dalkeith town centre has significantly more floorspace than any other centre, and there is a large difference between the floorspace available in the strategic town centres compared to the other town centres. Vacancy rates are low in most cases, with the exception of Penicuik. There is significant non-retail floorspace in all centres, although in no case does the non-retail floorspace exceed the retail floorspace.

Appendix 3 Midlothian Retail Study 2012 (see following document)

Midlothian Retail Study 2012

Final Report

RDPC

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Appendix 1 **Retail Assessment Tables 1 – 55a**

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RDPC

1 Introduction

1.1 Midlothian Council has commissioned RDPC Limited to undertake research into retailing patterns in the council area, as an input to preparation of the Midlothian Local Development Plan. The council wishes to investigate the availability of retail expenditure which could support current and future retail development in Midlothian, taking account of the strategic planning framework being laid down in the Proposed Strategic Development Plan for Edinburgh and South-East Scotland, and of planned future growth in households in the council area. An important aspect of the research is to quantify the amount of retail spending being lost out of Midlothian and also the amount being drawn into the area.

1.2 A previous study, ‘The Future for Retailing in Midlothian’, was undertaken by RDPC Limited during 2006 and 2007, and provided an input to preparation of the Midlothian Local Plan adopted in 2008. This new study updates the research undertaken in the previous study, but is also required to examine in more detail the shopping patterns and expenditure growth potential in three sub-areas of Midlothian – the A7/A68/Borders Railway corridor, extending from Dalkeith to Gorebridge and including Bonnyrigg, Rosewell and Pathhead; the A701 corridor extending from Straiton to Penicuik; and the Shawfair area of planned expansion adjacent to the south-eastern boundary of the City of Edinburgh Council area.

1.3 An essential research tool to inform such a study is a survey of household shopping patterns in the area. Accordingly a household survey was commissioned by RDPC and undertaken by NEMS Market Research, using broadly the same framework and questions for interviewing as was used for the previous study in 2006, to enable comparisons to be made between the 2006 and 2012 results.

1.4 To enable information to be obtained regarding retail expenditure drawn into Midlothian from other areas, the survey area for the household survey was extended to include parts of Edinburgh and East Lothian. In addition reference was made to the published results of the Scottish Borders Retail Study undertaken in 2011, to obtain an indication as to inflows of spending into Midlothian from the Scottish Borders area.

1.5 The methodology for the study comprised the following stages:

i) The household survey
ii) Estimation of likely changes in population and retail expenditure from 2012 to 2021, using population estimates from Midlothian Council and retail expenditure estimates from Pitney Bowes Business Insight
iii) Application of the population and expenditure estimates to the results of the household survey in order to quantify the scale of retail expenditure and pattern of distribution within, into and out of Midlothian
iv) Estimation of the current turnover performance of shopping destinations in Midlothian, and their trade draw characteristics
v) Analysis of the inflow and outflow (leakage) patterns of retail expenditure and application of these patterns to future projections of expenditure

vi) Estimation of the future turnover demands of existing retail floorspace and committed floorspace not yet operational
vii) Estimation of the scope for accommodating additional retail development within Midlothian to 2021.

1.6 This report comprises the following sections:

Household Survey
Assessment of Shopping Patterns and Centre Performance
Potential for Additional Retail Floorspace
Conclusions

2 Household Survey

2.1 Any study of retail shopping patterns and the potential for new floorspace provision must be founded on accurate up-to-date survey information. It is not possible to attempt to predict future shopping patterns in an area without first investigating current patterns.

2.2 This is particularly important in an area like Midlothian, where there is a long history of shoppers choosing to travel out of the area – particularly to Edinburgh – in order to obtain their shopping needs, and especially for non-food shopping. Investment in new modern shopping facilities in Midlothian over the past 20 years has been shown to have assisted in countering the flow of expenditure from Midlothian to Edinburgh, but the proximity of Edinburgh's shopping facilities and the continuing need for many Midlothian residents to travel into Edinburgh for work and leisure has meant that the draw of spending from Midlothian to Edinburgh remains an important influence on Midlothian's shopping patterns.

2.3 Consequently a major element of this study was the commissioning of a household survey to investigate the shopping habits of a representative sample of households living throughout the Midlothian Council area. In addition, in order to ascertain the scale of retail expenditure being drawn into Midlothian from neighbouring areas, the household survey area was extended beyond the boundaries of Midlothian to include parts of south Edinburgh and the western parts of East Lothian. Experience from previous studies, particularly those undertaken across the whole of the former Lothian Region area, indicated that the inclusion of these parts of Edinburgh and East Lothian would be likely to identify most of the retail spending which is drawn into the Midlothian area from external areas. Additional research was then undertaken to identify other likely sources of additional expenditure inflows, as explained later in this report.

2.4 The household survey was undertaken by a long-established and experienced research company, NEMS Limited, who also carried out the previous household survey in Midlothian in November 2006. The new survey involved conducting just over 1,300 telephone interviews during the period from 12th March to 12th April 2012. In all cases the interviews were with the main shopper in the household, selected by random sample.

2.5 For undertaking the interviewing and the subsequent analysis of the results, and to ensure an appropriate spread of interviews across the whole survey area, the area was divided into fourteen zones – ten in Midlothian, two in Edinburgh and two in East Lothian. The ten Midlothian zones were the same as those used in the 2006/7 study. Figure 1 shows the zones and their estimated 2012 populations.

2.6 Clearly the zones vary considerably in terms of their population, and so the number of interviews conducted in each zone reflected this, although for the purpose of ensuring that a representative sample of interviews was achieved, a proportionately higher number of interviews per head of population was conducted in the smaller population zones compared with the larger ones, and weighting techniques then used to ensure the results reflected the population distribution.

Figure 1: Household Survey Zones and 2012 Estimated Population (see Section 4 for details of population estimates)		
Zone 1	Danderhall	5,577
Zone 2	Dalkeith Town	10,247
Zone 3	Penicuik	16,672
Zone 4	Mayfield / Newtongrange	13,703
Zone 5	Gorebridge	7,817
Zone 6	Loanhead / Damhead	6,440
Zone 7	Bonnyrigg & Lasswade	15,809
Zone 8	Rosewell	1,495
Zone 9	Roslin / Bilston	2,912
Zone 10	Pathhead	1,606
Sub-total	**Midlothian**	**82,278**
Zone 11	Edinburgh South-West	28,232
Zone 12	Edinburgh South-East	37,064
Zone 13	Musselburgh	25,629
Zone 13	Western East Lothian	28,068
Total		**201,271**

2.7 Each interviewee was asked a range of questions regarding their usual choice and alternative choice of main food shopping destination, where they usually shop for ‘top-up’ food shopping, amount spent on food per week, where they had last bought various categories of comparison goods, their method of travel and frequency of visit. The full results of the survey, together with the questionnaire, are set out in the separate NEMS tabulations.

Shopping Habits in Midlothian

2.8 The results of the household survey show that the most popular destination for convenience shopping trips (i.e. for food and groceries) remains the Tesco store at Hardengreen, Eskbank. In answer to the question *“At which supermarket do you do most of your main food shopping?”*, 35% of respondents stated that the Hardengreen store was their preferred choice, compared with 42% in 2006. The Sainsbury’s store at Straiton was the choice of 13.3% of respondents, up from 12.5% in 2006, despite the opening of the new Asda at Straiton which now attracts 12.8% of households. The smaller Tesco store at Eastfield in Penicuik has dropped in popularity since 2006, from 16.3% to 10.4%. The four main stores together represent the choice of 71.4% of respondents, compared with the three main stores being chosen by 70.6% of respondents in 2006, suggesting that the arrival of Asda at Straiton has been at the expense of Tesco rather than any other stores or operators in Midlothian.

2.9 The Asda store at The Jewel remains a popular destination for Midlothian shoppers, being mentioned as their first-choice store by 6.5% of respondents, compared with 6.6% in 2006, suggesting that the opening of the Asda at Straiton has not helped to reduce leakage of spending out of Midlothian. The Morrisons store at Moredun in Edinburgh is now more popular as a first-choice store than in 2006, being selected by 5.6% of respondents compared with 4.8% in 2006.

2.10 In Penicuik the Lidl store is selected by 5.3% of respondents as their main store, compared with 3.5% who chose the former Somerfield store in 2006. In Dalkeith, the Lidl store is now preferred for main food shopping by more local households than in 2006, some 10% compared with the previous 5%.

2.11 For top-up shopping – the purchases carried out in between main-food shopping trips – the Lidl store in Dalkeith is now the choice of 18% of local households compared with 13% in 2006, while the Penicuik Lidl store is preferred for top-up shopping by 16.5% of respondents, compared with only 5.6% who chose the former Somerfield in 2006.

2.12 The overwhelming majority of convenience shopping trips in Midlothian - 86% - are undertaken by car, with around 8% by bus and 5% on foot. Some 70% of households undertake their main food shopping trip once a week, with 11% doing their main food shopping more than once a week and 10% shopping on a fortnightly basis. Only 1.4% of households order their food shopping by internet for home delivery, up from 0.3% in 2006. Most food shopping trips start and end at home, but 7% of shoppers take the opportunity to do their main food shopping on the way home from work.

2.13 The survey also investigated shopping trips to buy 'comparison' goods (i.e. items other than food, drink and basic household essentials), in order to identify the proportions of households buying various categories of comparison items in the shopping centres in Midlothian and beyond, thus providing data on how much non-food spending is retained within Midlothian and how much is lost to Edinburgh and other external locations. For these shopping trips, a lower proportion are made by car – 79% - and a higher proportion – 17% - by bus. Internet spending on comparison goods by Midlothian households was higher than for convenience spending, at around 8% of all spending, compared with 4% in 2006.

2.14 The survey investigated shoppers' most recent choice of shopping destination for buying various types of comparison goods – clothing and footwear, sports goods, CDs and DVDs, audio-visual equipment, portable and non-portable domestic appliances, furniture and carpets, textiles and soft furnishings, crockery and glassware, chemists goods, DIY goods, jewellery, and bicycles/toys. For clothing and footwear purchases, Fort Kinnaird at Newcraighall is now the most popular choice, being specified by 25% of respondents, compared with only 14% in 2006, while Edinburgh City Centre – although overtaken by Newcraighall since 2006 – has also increased in popularity from 21% in 2006 to 23% now. The Gyle Centre has dropped in popularity from 14% in 2006 to 11% now.

2.15 For furniture and carpets, Pentland Retail Park at Straiton remains the most popular choice, at 19%, compared with 27% in 2006, while Newcraighall was specified by 11% of respondents, compared with 8% in 2006. Edinburgh City Centre is preferred by around 8% of respondents, the same as in 2006.

2.16 In the next section of this report we examine in more detail the distribution of convenience and comparison spending, by applying the results of the household survey to expenditure levels in each area, which provides a more accurate picture of the extent to which retail expenditure is either retained within Midlothian or lost to external destinations.

3 Assessment of Shopping Patterns and Centre Performance

3.1 The outputs from the household survey provide essential data regarding shopping patterns which can then be applied to estimates of retail spending in order to build a picture of the volume of expenditure flows passing from local residents to shopping destinations in Midlothian and beyond. The calculations involved in this exercise are set out in a series of detailed tables which are contained in Appendix 1 to this report.

Population Estimates

3.2 The starting point is the estimation of population within each of the survey zones listed in Figure 1, and then the production of estimates of population change over the period to be examined by the study from 2012 to 2021. These estimates were provided by Midlothian Council, taking account of potential growth in population in some parts of the council area as a result of development initiatives and planned release of land for housing.

3.3 As described previously the study is intended to inform the Midlothian Local Development Plan (LDP), by indicating the implications for the retail sector arising from implementation of the land use strategy for the area. The population projections prepared by the National Records of Scotland (formerly the General Register Office Scotland) are trend based and do not reflect the distribution of development activity resulting from the Edinburgh and Lothians Structure Plan 2015 and the Proposed Strategic Development Plan for Edinburgh and South East Scotland. Midlothian Council's future population estimates are based on the 2011 Housing Land Audit agreed with the development industry, and also have regard to allocations stemming from the Proposed SDP, as well as future windfall development. Housing Land Audit programming is reviewed annually, and may be affected by such matters as infrastructure constraints and the general economic situation.

3.4 2021 was selected as the end date of the population projection, to match with the expenditure projections provided by Pitney Bowes Business Insight. Although the expenditure growth estimates to 2021 could have been used to project further ahead, for example to 2024 which is the horizon year for the Local Development Plan, this would have resulted in an unduly lengthy projection period, particularly given current uncertain economic conditions (see also paragraphs 3.8 to 3.16 regarding expenditure projections).

3.5 The population estimates to 2021 are set out in Table 2 in Appendix 1. They show a growth in population in Midlothian from 82,278 persons in 2012 to 96,442 persons in 2021, an increase of 17%.

3.6 Also evident from Table 2 are the estimates of population growth in the rest of the study area, in south Edinburgh and western East Lothian. These estimates, provided by Pitney Bowes Business Insight, also show significant growth from 2012 to 2021, from 118,993 persons to 129,153 persons, an increase of 8.5%.

3.7 As explained in the previous section of this report (paragraph 1.2), Midlothian Council wishes to examine shopping patterns and the potential for new retail development not only across the Midlothian area as a whole, but also within three sub-zones – the A7/A68 Borders Rail corridor, the A701 corridor, and the Shawfair area adjacent to the south-eastern boundary with Edinburgh. Accordingly Table 2a shows the population growth estimates for these three sub-areas. The greatest projected population growth is in the A7/A68 Borders Rail corridor, in which growth is expected at nearly 9,000 persons between 2012 and 2021. The Shawfair area shows relatively low growth to 2021, but there will be continuing growth beyond the end of the study period, arising from the development of the planned new settlement and expansion of Danderhall.

Expenditure Growth Estimates

3.8 Pitney Bowes Business Insight were commissioned by Midlothian Council to provide estimates of retail spending per head for each of the fourteen zones in Midlothian, south Edinburgh and western East Lothian. These estimates are generated using well-established and tested techniques developed by PBBI's predecessors The Data Consultancy and refined by PBBI's association with Oxford Economics. The estimates take account of long-term trends in expenditure patterns, which reflect the cyclical nature of economic growth, and the trend projections are adjusted to take full account of exceptional deviations from trend lines such as those which have been witnessed over the four years during the economic recession and stagnation.

3.9 Although it is well documented that spending in some sectors – for example in the residential housing market – has been badly affected by the recession, the growth in retail spending on comparison goods has held up better than might have been expected, despite consumers being substantially more cautious and less inclined to buy on credit. Thus while there have been periods during which consumer retail spending on comparison goods has shown a reduction in real terms, for example in 2009, the overall trend of year-on-year growth has been maintained, although at a significantly lower rate than the high levels seen in the 2000 – 2003 period.

3.10 Growth in spending on convenience goods has traditionally remained low over the past thirty years or more, with growth in real terms rarely exceeding 2% per annum and more commonly sitting at less than 1%. For example PBBI data based on statistical releases from the Office for National Statistics (ONS) shows that the average growth in spending on convenience goods from 1964 to 2009 has been only 0.6% per annum, and over the past twenty years it has been only 0.9% per annum. Furthermore there was shrinkage in convenience spending in 2008 and 2009.

3.11 While the long-term trend lines for spending growth would suggest that annual growth of around 6% for comparison spending could be expected in future years, the knock to the economy over recent years and the continuing uncertainties affecting consumer confidence – in particular the recent return to recession in the UK, and cuts in employment in both the public and private sectors, as well as prolonged economic upheaval in Europe – indicate that more cautious growth figures should be used, despite the fact that this means producing estimates which fall below already-cautious trend line projections.

3.12 The expenditure growth rates used in this study are taken from the latest bulletin produced by Pitney Bowes Business Insight in conjunction with Oxford Economics, issued in November 2011. The growth rates which Oxford Economics recommend should be used for estimating expenditure increases over the next ten years indicate average growth in convenience spending of 0.7% per annum, with growth in comparison spending at an average of 4.7%.

3.13 Although this comparison estimate of 4.7% growth per annum is justified by reference to an analysis of historic growth trends and cyclical fluctuations, it may seem optimistic when compared with the current low-growth figures being recorded in the retail market. Accordingly we have also tested the implications of a much lower average rate of annual growth, of only 3% from 2012 to 2021, despite the fact that this is well below the long-term average of 4.8% recorded from 1964 to 2010 – a growth rate which was achieved despite several recessions and some extremely difficult economic times in the UK.

3.14 Details of the estimated growth in retail expenditure per head are shown in Table 3 in Appendix 1, while Table 4 shows the total convenience and comparison expenditure likely to be generated, by applying the estimates of expenditure per head from Table 3 to the estimates of population changes discussed earlier and set out in Table 2. The effects of the alternative 3% rate of growth in comparison spending are shown in Tables 3a and 4a.

3.15 As will be seen from Table 4, this exercise shows that convenience spending across Midlothian can be expected to rise, from £177 million in 2012 to £220.8 million in 2021 (at constant 2012 prices). Comparison spending rises from £261.7 million in 2012 to £464.6 million in 2021, an increase of £203 million. However this is clearly a much lower increase than would have been expected had the comparison expenditure growth rates of a few years ago been sustained.

3.16 Using the alternative lower growth rate for comparison spending of 3% per annum, the increase is reduced to £138.5 million, reaching only £400 million instead of £464.6 million in 2021, as shown in Table 4a. The implications of this lower growth rate for new retail development will be examined later in the report.

Convenience and Comparison Spending by Area, 2012 - 2021

3.17 Tables 5 and 6 show how the estimated growth in convenience and comparison spending is distributed across the survey area, both for Midlothian and for the 'outer catchment' areas of South Edinburgh and Western East Lothian. The Penicuik zone is the area with the highest convenience and comparison spending, followed by the Bonnyrigg and Lasswade zone. Of the total growth in comparison spending in Midlothian of £203 million, more than £34 million of growth is expected in the Penicuik zone, and £35 million in the Bonnyrigg and Lasswade zone. In Zones 1 and 2 – Danderhall and Dalkeith – the combined total growth in comparison expenditure is nearly £44 million between 2012 and 2021.

3.18 Tables 5a and 6a show the estimated growth in convenience and comparison spending in the three sub-areas of the A7/A68 Borders Rail corridor, the A701 corridor, and the Shawfair area. Because the population in the A7/A68 sub-area is approximately double that of the population in the A701 sub-area, the available spending in the A7/A68 sub-area is similarly around double the amount available in the A701 sub-area, throughout the study period.

Comparison Spending by Category

3.19 Table 7 shows the estimated level of spending on each category of comparison goods, making up the total comparison spend of £261.67 million in 2012. The highest spend is in the clothing and footwear category, at £65.5 million for the whole of Midlothian, which represents 25% of the total spend.

Retail Floorspace in Midlothian

3.20 One of the main aims of this study is to estimate the amount of spending being directed to each of the shopping destinations in Midlothian, so that their relative trading performances can be examined. This exercise cannot be undertaken unless the amount of retail floorspace in each centre is known. Midlothian Council has provided updated estimates of all existing retail floorspace within the council area, as set out in Table 8, showing a total level of gross convenience floorspace at 41,422 square metres, with a further 77,682 square metres of gross comparison floorspace. The net trading areas are also shown.

3.21 The largest amount of retail floorspace – both convenience and comparison – is found at Straiton, where the Pentland Retail Park, the Sainsbury's and Asda stores, the Costco and IKEA retail warehouses, and other associated retail units combine to provide 15,879 square metres of gross convenience floorspace and just under 58,000 square metres of gross comparison floorspace, equating to 38% of the convenience total and 75% of the comparison total.

3.22 The town centres of Dalkeith, Bonnyrigg and Penicuik each have a similar amount of convenience floorspace, of 2,432 square metres, 2,292 square metres and 2,173 square metres gross respectively. Dalkeith is the largest focus for comparison floorspace after Straiton, with just over 8,000 square metres, while Penicuik has 3,338 square metres and Bonnyrigg 2,670 square metres. The three main town centres have a combined total retail floorspace of 20,934 square metres, less than one fifth of the total retail floorspace at Straiton.

Categories of Convenience Shopping

3.23 The household survey questionnaire was designed to explore many aspects of shopping habits. For food shopping, it is widely recognised that people shop for food in a variety of ways and, where there is choice, they do not always visit the same shop each week. The major retailers all operate differently, they stock different product brands of more specialist items, their 'own brands' of course differ, and they have varying policies on price and on special offers. Depending on what the shopper wants in any particular week, they may decide to go to a different shop from the one they visited the previous week.

3.24 However it generally remains the case in most areas that households have one shop which they will visit more frequently than any other – their first choice food supermarket. Consequently the household survey asked respondents to name that preferred store, but also to identify what would usually be their second choice store for a main food shopping expedition. This second store will usually be visited less frequently but may still consume a significant proportion of the household's annual spend on groceries. The questionnaire also asked respondents to estimate their average weekly spend on main food shopping, and to estimate what proportion of their main food spend would be directed to their first choice store.

3.25 The answers to these questions enable calculations to be made of the proportions of main food spending which are directed, in each zone, to the preferred and second choice store. The survey revealed that the proportion spent by Midlothian households in the first choice store ranged from 70% to 81%, with the average at 78.6%.

3.26 Question 16 in the survey asked respondents to estimate how much, in addition to their main food expenditure, they spend each week on 'top-up' shopping – the expenditure on minor additional items, often bought locally, purchased in between main food shopping trips. The responses to this question enabled the production of estimates of the amount which households spend on top-up shopping per week in each zone.

3.27 Using this information and the calculations of main food spending in the first and second choice store, it is then possible to tabulate the full picture as regards the split of convenience spending for each zone in Midlothian. Table 9 in Appendix 1 shows the results. For the Midlothian Council area, the proportions were as shown below in Figure 2.

Figure 2 : Proportions of Convenience Spending by Midlothian Shoppers

Main Food Shopping		
In First Choice Store	In Second Choice Store	Top-up Shopping
68.7% £121.48 m	**18.7%** £33.01 m	**12.7%** £22.46 m

3.28 With this allocation of expenditure calculated for each zone, it is then possible to use the responses to the household survey regarding the three categories of convenience spending in order to calculate, for each zone, firstly the percentage of convenience spending directed to the main food first choice, main food second choice and top-up shopping destinations, and then the actual amount of convenience expenditure in each category which flows from each zone to each destination. Tables 10 to 12 in Appendix 1 show the percentage flows for each of the three categories of convenience spending, and Tables 13 to 16 show the actual volumes of spending, Table 16 being the summation of each of the three categories of convenience spending.

3.29 The figures in Table 16 show that, from a total convenience expenditure generated within Midlothian of £177 million, £141 million is retained and spent at shopping destinations within the council area, equivalent to 80% of all convenience spending, with leakage at 20%. This represents a small increase in leakage compared with 2006, when the level was 18.6%, despite the fact that a new superstore has been built at Straiton.

3.30 Table 16 also shows that the total convenience spending in Midlothian, after allowing for a £36.2 million inflow of spending from Edinburgh, East Lothian and the Scottish Borders, is £177.7 million, which represents a 25.6% inflow of spending over and above that which is generated from within Midlothian. This inflow of spending effectively cancels out the negative effect of leakage (£35.5

million), and leaves total convenience spending in Midlothian at just above the total amount of spending generated from Midlothian's residents.

3.31 The final column in Table 16 shows, for each destination in Midlothian, the proportion of additional trade drawn from outside Midlothian. The Tesco store at Hardengreen receives a 14% 'bonus' of imported expenditure, which is greatly exceeded by the inflow to the Sainsbury's store at Straiton, where an extra £15 million of turnover is obtained from outside Midlothian, equating to a 80% boost in total turnover. The proportion of imported expenditure is even greater for the M&S Simply Food store at Straiton, which takes more of its turnover from Edinburgh than from Midlothian.

Convenience Trade Draw

3.32 Tables 17 to 20 then examine the results for total convenience spending in more detail. Table 17 shows the proportion of trade attracted to each main convenience shopping destination in Midlothian by area of origin, which illustrates the extent to which each destination relies on Midlothian for its trade. For the three main town centres of Dalkeith, Bonnyrigg and Penicuik, in all cases the proportion of trade drawn from within Midlothian is very high, and in the case of Penicuik is 100%. The Tesco at Hardengreen takes 88% of its trade from within Midlothian, whereas the convenience stores at Straiton rely on Midlothian shoppers' spending for only 62% of their total turnover.

3.33 Table 18 shows, for the trade which is drawn from within Midlothian, the proportions of trade drawn from the three sub-areas of the A7/A68 corridor, the A701 corridor and the Shawfair area. Most destinations rely heavily on either the A7/A68 or the A701 corridors, Straiton being the only area which draws trade in substantial amounts from throughout Midlothian, with 38% coming from the A7/A68 corridor. The Tesco store at Hardengreen relies heavily on the A7/A68 corridor for its Midlothian trade.

3.34 Table 19 breaks down the trade draw patterns in even more detail by looking at the percentage draw to each destination from each of the ten zones within Midlothian. As would be expected, the smaller town centres rely mostly on their own local area for convenience trade, while the main superstores draw their trade from throughout Midlothian. The largest proportion of the Tesco Hardengreen's turnover comes from Bonnyrigg and Lasswade (one third of the amount which it draws from within Midlothian), while the Sainsbury at Straiton relies most heavily on the Loanhead area (32% of its Midlothian trade). The new Asda store, like the Sainsbury, draws from many parts of Midlothian, but more of its turnover comes from Penicuik (29.4%) than any other Midlothian zone.

Convenience Market Share and Leakage

3.35 Table 20 deals with market share, and shows – for each of the ten Midlothian zones – where the convenience expenditure generated in each zone is spent. For example, looking down the column for the Penicuik zone, it is possible to see that 47.8% of spending generated in the Penicuik zone is spent at the Tesco store at Eastfield, and a further 11.2% in Penicuik town centre, so that the amount of spending retained locally equates to 58% of all convenience spending.

3.36 The table also shows, for each shopping destination, what share of the market it achieves in each zone. For example, the Sainsbury store at Straiton obtains a 43% share of available spending in the Loanhead area, compared with Asda's 29% share, while in the Penicuik area the Sainsbury achieves a 14.9% share of available spending compared with Asda's 17.8% share.

3.37 Households in the Penicuik, Loanhead and Rosewell zones are the least inclined to travel out of Midlothian for their convenience shopping needs, while shoppers living in the Danderhall area are the most inclined to travel elsewhere. The final column in Table 20 shows that, of the total convenience spending generated within Midlothian, nearly 30% goes to Tesco at Hardengreen, down from 35% in 2006, while 10.6% goes to the Sainsbury's at Straiton, compared with 13.2% in 2006. The Tesco at Eastfield in Penicuik achieves a 10% market share, compared with 14.3% on 2006. Thus all these stores have lost market share since 2006, while the new Asda at Straiton is now capturing a 12.2% share of convenience spending.

Figure 3 : Convenience Market Share Retained and Lost by Zone

		Retained Locally	Retained in Midlothian	Leakage incl Internet	Internet
1	Danderhall	7.2%	53.3%	46.7%	1.4%
2	Dalkeith Town	57.2%	70.4%	29.6%	1.4%
3	Penicuik	59.0%	93.8%	6.2%	0.7%
4	Mayfield / Newtongrange	13.8%	73.8%	26.2%	2.9%
5	Gorebridge	10.8%	75.0%	25.0%	1.2%
6	Loanhead / Damhead	83.1%	92.5%	7.5%	0.3%
7	Bonnyrigg & Lasswade	11.2%	83.8%	16.2%	2.1%
8	Rosewell	2.6%	92.1%	7.9%	0.0%
9	Roslin / Bilston	13.3%	73.6%	26.4%	0.0%
10	Pathhead	3.2%	76.7%	23.3%	0.0%
	Midlothian		79.9%	20.1%	1.4%

3.38 Figure 3 summarises the differing proportions of leakage and retained spending across the Midlothian Council area. It has already been noted that total leakage including internet spending is 20.1%, up from the 18.6% level of 2006. Although internet spending is often regarded as spending which is lost from the area, the reality is that most food and grocery orders placed online are delivered from the nearest superstore, so effectively the trade is retained within Midlothian.

The Relative Importance of Main Food and Top-Up Shopping

3.39 A useful indicator of the role of each convenience shopping destination is the proportion of its total turnover which is made up of top-up rather than main food shopping. It is evident that some centres can only be catering primarily for top-up shopping, because of the scale of leakage to larger centres and because of their limited range and scale of local convenience shopping facilities. However the results of the household survey enable us to see, for the main destinations in each zone, which locations are relying more on top-up shopping and which are catering primarily for main food shopping. This analysis is shown in Figure 4.

3.40 Figure 4 shows that Penicuik and Dalkeith town centres are still catering for a substantial proportion of main-food trade, despite the dominance of the major superstores, whereas Bonnyrigg town centre and the other smaller centres are focusing more on top-up convenience trade. The main superstores and the Tesco supermarket at Eastfield are catering primarily for main-food shopping trips, although 5.7% - £3.4 million – of the trade at the Tesco store at Hardengreen is generated by top-up shopping, reflecting its convenience and proximity to adjacent and nearby housing estates.

Figure 4 : Main Food and Top-Up Split by Destination

		Main Food			Top-Up			Total
	Destination	£m	%		£m	%		£m
	Sainsbury's Straiton	32.35	96.0%		1.36	4.0%		33.71
	Asda Straiton	28.30	95.6%		1.29	4.4%		29.59
	Tesco Hardengreen	56.52	94.3%		3.41	5.7%		59.93
	Tesco Eastfield Penicuik	17.04	88.4%		2.24	11.6%		19.28
	Penicuik town centre	3.41	72.9%		1.27	27.1%		4.68
	Dalkeith town centre	7.03	71.3%		2.83	28.7%		9.86
	Gorebridge incl Hunterfield	0.88	48.4%		0.94	51.6%		1.82
	Bonnyrigg town centre	1.91	43.5%		2.48	56.5%		4.39
	Newtongrange	1.13	40.8%		1.64	59.2%		2.77
	Loanhead	0.41	38.0%		0.67	62.0%		1.08
	Roslin / Bilston	0.27	34.2%		0.52	65.8%		0.79
	Mayfield	0.71	34.1%		1.37	65.9%		2.08
	Danderhall	0.24	23.1%		0.80	76.9%		1.04
	Midlothian Total	**155.45**	**87.5%**		**22.23**	**12.5%**		**177.68**

3.41 Although a high proportion of top-up spending indicates that the centre is not proving successful at attracting main food shopping trips, it also means that it has a significant 'captive market', because top-up shopping trips are much less prone to diversion to other centres as a result of new retail developments.

Comparison Spending

3.42 The distribution of comparison trade in Midlothian was investigated by the household survey on the basis of a wide range of goods categories, as shown in Figure 5 (derived from Table 7 in Appendix 1). The actual proportions of comparison spending on each category was estimated by PBBI as part of their analysis of population and spending patterns in the Midlothian Council area, and revealed around 25% spending on clothing and footwear, some 9% on furniture, carpets and floor coverings, 6% on DIY goods, and 10.5% on chemists' goods. These proportions are broadly similar to the average across Great Britain, although – for example – the proportion of retail spending on clothing and footwear, and on furniture and floor coverings, is slightly higher than the British average, whereas the spending on some other goods (e.g. audio-visual equipment, DIY and chemists' goods) is a little lower.

3.43 By applying these percentages of spending to the amount of locally-generated spending in each zone (as shown in Table 7), the amount of spending per zone on each category of comparison goods can be calculated. These amounts per zone and category are then applied to the responses obtained from the respondents to the household survey in order to estimate the distribution of comparison spending on each category of product throughout Midlothian and the Outer Catchment.

Figure 5: Proportions of Spending on Comparison Goods Categories

Category of Comparison Spending	Percentage
Clothing and Footwear	25.0 %
Sports Goods	5.0 %
CDs / DVDs	2.9 %
Audio-visual Equipment	9.3 %
Portable Domestic Items	1.8 %
Non-portable Domestic Items	1.2 %
Furniture / Carpets / Floor-coverings	9.2 %
Textiles / Soft Furnishings	3.6 %
DIY goods	6.1 %
Crockery / Pots / Pans	2.0 %
Chemists' Goods	10.5 %
Jewellery / Clocks / Watches	3.3 %
Bicycles / Games / Toys	3.7 %
Other Miscellaneous / Recreational Items	16.1 %

3.44 Tables 21 to 34 in Appendix 1 show the results of these calculations for each product category. Table 35 then shows the total amount spent by the residents of each zone on all comparison goods, showing where this money is spent, both in Midlothian and in other centres outside the council area. Table 35 also shows the draw of comparison trade into Midlothian from the Outer Catchment Area and the Scottish Borders.

3.45 Probably the most striking feature of Table 35 is that Midlothian loses 61.5% of its comparison spending to other areas, and in particular to Edinburgh. Of Midlothian's total available comparison spending, £130.5 million (49.9%) goes to Edinburgh's shopping centres, while only £100.8 million is retained. These leakage figures compare with a 61.7% total leakage figure in 2006, and a loss of spending to Edinburgh of 53%. Thus the percentage of outward flow of spending to Edinburgh has reduced a little, but a large rise in internet spending, from 4.3% to 8.2%, has meant that the proportion of retained spending in Midlothian is virtually unchanged from 2006 to 2012. In terms of spending volume, leakage to Edinburgh has increased by £10 million since 2006. Figure 6 (below) shows how leakage to Edinburgh, other areas and the internet has changed since 2006. The figures for 2006 are taken from the results on the 2006 survey as tabulated in the 2007 report, but adjusted to 2012 prices to enable direct comparisons to be made with the 2012 figures.

Figure 6: Leakage and Retention of Comparison Spending, 2006 - 2012

	2006 *	2006		2012	2012
	£m	%		£m	%
Retained in Midlothian	87.01	38.3%		100.80	38.5%
Leakage to Edinburgh	120.40	53.0%		130.51	49.9%
Leakage to other areas excl internet	10.07	4.4%		8.91	3.4%
Internet Spending	9.71	4.3%		21.45	8.2%
Total Midlothian Comparison Spend	227.19	100%		261.67	100%
Note: * Converted to 2012 prices					

3.46 Although leakage has remained at virtually the same percentage level from 2006 to 2012, Table 35 shows that there is also a significant inflow of expenditure from other areas into Midlothian, so that the level of retained comparison spending - £100.8 million – is boosted by an inflow of £61.6 million, which equates to a 38% increase in spending over and above that which is generated by Midlothian residents and retained in the Midlothian area.

3.47 In particular, trade drawn into Midlothian from Edinburgh, East Lothian and the Scottish Borders results in some very substantial boosts to the turnovers being achieved in the Straiton area, with Pentland Retail Park receiving a 47.6% addition to its turnover, which raises its turnover in monetary terms from £52 million to £99 million. Although the total inflow of spending falls well short of the amount of leakage out of Midlothian, it does assist in significantly reducing the level of net leakage.

3.48 Also evident from Table 35 is the variation in leakage level between the ten zones in Midlothian. Zone 6 – the Loanhead area – has the lowest level of leakage to non-Midlothian destinations, at 47%, because of the beneficial effects of the shopping facilities at Straiton. Leakage from the Penicuik area is similarly below the Midlothian average, at 48%. By contrast, Zone 10 - the Pathhead area – sends 82% of its comparison spending to non-Midlothian shopping destinations.

Comparison Expenditure Leakage by Product Category

3.49 As well as examining the changes in leakage levels by destination, it is also helpful to consider changes in leakage by product category. Figure 7 shows the comparison between 2006 and 2012 in terms of the amounts spent on each category of comparison goods.

3.50 The table in Figure 7 shows that the amount of leakage has increased by £20 million despite a slight drop in the percentage leakage level, and also that leakage in some categories has increased by more than in other categories – for example CDs and DVDs (mainly due to an increase in internet purchases, up from 11% of spending to 37%) and audio-visual equipment, furniture / floor-coverings, textiles and DIY goods. Leakage on clothing and sports goods spending has increased in real terms but reduced in percentage terms.

3.51 Table 36 shows the full details of the amount spent in each zone according to each product category. It should be noted that, because it is not practical to ask the respondents of a household survey to specify their spending habits on every one of the many categories of comparison goods, the survey focused on those categories which make up the majority of comparison sales. The distribution of spending for the final ‘miscellaneous’ category was then estimated on the basis of the distribution revealed by the survey for other similar types of goods.

Figure 7: Leakage in Comparison Goods Categories, 2006 - 2012					
Category of Comparison Spending	2006 *	2006		2012	2012
	£m	%		£m	%
Clothing and Footwear	50.42	84.5%		51.28	78.2%
Sports Goods	6.51	72.1%		7.71	58.5%
CDs / DVDs	4.18	60.3%		5.58	73.7%
Audio-visual Equipment	14.18	60.4%		16.68	68.3%
Portable Domestic Items	2.88	49.7%		2.56	53.3%
Non-portable Domestic Items	3.88	58.3%		2.31	72.5%
Furniture / Carpets / Floor-coverings	8.98	42.6%		11.80	48.8%
Textiles / Soft Furnishings	2.40	34.4%		3.64	38.3%
DIY goods	7.93	57.8%		10.06	63.3%
Crockery / Pots / Pans	2.39	46.7%		2.16	41.3%
Chemists' Goods	3.45	16.3%		4.82	17.5%
Jewellery / Clocks / Watches	5.31	83.0%		7.12	82.3%
Bicycles / Games / Toys	5.12	74.8%		6.78	69.1%
Other Misc / Recreational Items	22.55	65.7%		28.37	67.2%
Midlothian Total	**140.18**	**61.7%**		**160.87**	**61.5%**
Note: * Converted to 2012 prices					

Trade Draw and Market Share Characteristics

3.52 Tables 37 to 40 show detailed analyses of the patterns of comparison shopping across Midlothian – Tables 37 and 38 look at spending by product category, and Tables 39 and 40 examine spending by zone.

3.53 Thus Tables 37 and 39 can be used to show how the turnover of each centre is made up, in terms of the types of goods bought (Table 37) and the area from which the spending is drawn (Table 39). Table 37 shows that clothing / footwear and chemist's goods are important to Dalkeith, and that chemist's goods are also important in the other Midlothian town centres. The new Asda at Straiton is shown to be taking a large proportion of its comparison turnover from the clothing and footwear category – 59% of its turnover or £2.58 million. Clothing sales are also important at the Tesco at Hardengreen, amounting to 23% of sales to Midlothian households. The furniture and carpets category is important in Newtongrange, reflecting the existence of a carpet outlet there, and at IKEA Straiton.

3.54 Table 39 shows that most comparison trade in Midlothian's town centres is drawn from the immediate local area. Dalkeith also draws trade from the Mayfield / Newtongrange area and some from Bonnyrigg / Lasswade. Bonnyrigg draws some trade from Gorebridge, while comparison trade in Penicuik is drawn almost entirely from the local area. Loanhead is shown to draw comparison trade from several areas, but this may be a result of some survey respondents confusing 'Loanhead' with 'Straiton'. The Pentland Retail Park is drawing trade from across Midlothian, but particularly from Bonnyrigg, Loanhead and Penicuik.

3.55 Table 38 shows the share of spending on each product category by each shopping destination. For the important category of clothing and footwear, 48% of all Midlothian's spending goes to Edinburgh City Centre or Newcraighall, and 9.5% to Pentland Retail Park. The equivalent proportions in 2006 were 38% and 5.7%, so Pentland Retail Park is now more attractive, but so are Edinburgh City Centre and Newcraighall. The Gyle Centre and Cameron Toll are less popular than in 2006 – their combined share of the clothing and footwear market from Midlothian has dropped to 12.4%, compared with 26.5% in 2006.

3.56 Pentland Retail Park achieves a high share of spending in the sports goods, furniture / floorcoverings, textiles and DIY categories, and a significant share in the various electrical goods categories. It is in those categories where Pentland Retail Park achieves a good market share that leakage levels are lower, which highlights the importance of the Straiton area's shopping facilities in retaining comparison spending within Midlothian.

3.57 Pentland Retail Park's total share of Midlothian's comparison spending, as shown in Tables 38 and 40, is now 19.9%, up from 18.8% in 2006. Dalkeith on the other hand is now less popular, capturing 4% of trade compared with 5.2% in 2006. Penicuik town centre's share of comparison spending has improved a little, from 2.3% to 2.9%, with most other smaller centres remaining similar to their 2006 levels.

3.58 Edinburgh City Centre's share of Midlothian's comparison spending remains the same as in 2006, at 15%, while Newcraighall now takes 25%, up from 22%. Cameron Toll's share has dropped from 4.5% to 1.9%, while the Gyle Centre is down to a 3.2% share from its 2006 level of 5.8%. As we have already noted, internet spending has risen from 4.3% to 8.2%.

3.59 Table 40 shows the market share achieved by each destination in each of the ten Midlothian zones. Pentland Retail Park achieves a good market share across the ten zones, and has the highest share of Midlothian spending in the all zones except Dalkeith and Pathhead, where Dalkeith town centre achieves a higher market share. It is noticeable that Edinburgh City Centre and Newcraighall both achieve a substantial market share in most Midlothian zones, and Newcraighall is the most popular comparison shopping centre for Midlothian households, taking 40.7% of all spending from the Mayfield / Newtongrange area and 47.3% of spending from the Pathhead area. Penicuik and Loanhead are the only zones where Newcraighall attracts less than 10% of the available comparison spending.

Comparison Trade Draw by Sub-Area

3.60 Table 41 shows how Midlothian's retail centres draw their comparison trade from across the three sub-areas which are being examined. As would be expected, most of the centres located in each sub-area draw most of their trade from their own sub-area – in particular Penicuik draws 97% of its comparison trade from the A701 corridor, while Bonnyrigg takes 99% of its trade from the A7 / A68 corridor. The shopping facilities in the Straiton area are the only ones which draw their trade from both corridors in significant quantities.

Comparison Trade at Costco and IKEA

3.61 Two major draws of comparison trade at Straiton are the Costco and IKEA stores. Both are recognised to draw trade from a wide area and from well beyond Midlothian's boundaries. Table 35 shows that both stores obtain only a small amount of comparison turnover from Midlothian shoppers - £2.86 million at IKEA and £2.66 million at Costco, while Table 16 shows that Costco obtains less than £1 million convenience spending from Midlothian residents. Costco is shown to draw a further £0.8 million convenience spending and £1.55 million comparison spending from the outer catchment, while IKEA is shown to draw £7.6 million from the outer catchment and the Scottish Borders.

3.62 However in both cases the total turnover is clearly well below what would be expected to be achieved at each store. Furthermore the amount of spending shown to be drawn from the Midlothian and outer catchments is likely to be an underestimate, because the survey is only able to identify first and second choice main food stores, and the location where comparison items were most recently bought, whereas for Costco and IKEA, their turnover is likely to be derived from shoppers making relatively infrequent visits. In particular Costco only caters for bulk-buy convenience purchases, which are likely to be made over and above the conventional main food shopping trip.

3.63 In order to achieve a more meaningful picture of the contribution which Costco and IKEA make to comparison spending in Midlothian, we have produced Table 42 which examines these two destinations in more detail. By reference to the 2012 edition of Retail Rankings it is possible to estimate the likely total turnover of both stores, and then to make further calculations to estimate the likely proportion of trade being brought to these stores from beyond the area surveyed in this study.

3.64 For the Costco store, around 65% of the total turnover is estimated to be generated by wholesale purchases, which are not relevant to this study and have to be deducted. As Table 42 shows, the amount of convenience retail spending – excluding wholesale purchases - at this store is likely to be around £12.4 million, with a similar amount - £12.6 million – being spent on comparison goods. The survey has shown a turnover drawn from the study area of £1.67 million convenience and £4.21 million comparison spend, which indicates a further £10.77 million convenience spending and £8.36 million comparison spending being drawn to Costco from beyond the study area.

3.65 For the IKEA store, we have estimated that its total comparison turnover could be just over £50 million in 2012 based on evidence from Retail Rankings and information regarding the sales area of the IKEA store. As the survey shows £10.5 million being drawn from within Midlothian and the outer catchment, that indicates a further £40.25 million being drawn to IKEA from beyond the study area.

3.66 It is important to stress that Costco and IKEA are special destination stores drawing trade from a wide area which would not otherwise be attracted into Midlothian from such distant sources. Thus any assessment of capacity for additional retail floorspace in Midlothian should take account of the fact that the wider trade draw of these stores and the expenditure which they draw into Midlothian is not likely to be available for diversion to other retail facilities and/or new retail floorspace. The exercise shown in Table 42 is intended to try to complete the picture of shopping patterns in the Midlothian area, and to reconcile the small amount of trade which these stores draw from Midlothian shoppers with the level of total turnover which the stores are likely to achieve. The exercise is also useful in demonstrating that neither store is competing to any significant extent with other retail facilities in Midlothian, even allowing for the possibility that the amount of trade which these stores draw from within

Midlothian has been underestimated to some extent because of the limitations of the household survey.

Total Leakage and Inflow of Expenditure in Midlothian

3.67 Having regard to the comments in the previous paragraph, we have produced Tables 43 and 44 which summarise, for both convenience and comparison spending, the estimated inflows and outflows of expenditure in Midlothian in 2012, including the likely effects of Costco and IKEA. Table 43 shows the leakage of convenience spending of £35.5 million, and the estimated total inflow of £47 million, resulting in a total convenience spend in Midlothian of £188.45 million. For comparison shopping, the leakage is £160.87 million, the inflow from the outer catchment at £61.6 million, and the inflow to Costco and IKEA at £48.6 million, generating a total inflow of £110.2 million. Thus the total comparison spend in Midlothian in 2012 is estimated at £211 million.

3.68 Table 44 presents the same information but allocated to the three sub-areas of A7/A68 corridor, A701 corridor and the Shawfair area. This table highlights the substantial inflows to Straiton of both convenience and comparison expenditure and, in the A7/A68 corridor, the inflow of convenience spending to the Tesco store at Hardengreen.

Total Turnovers and Turnover Performance

3.69 Having produced estimates of the convenience and comparison turnovers of Midlothian's shopping destinations, the next stage is to examine the turnover performance of each destination, by calculating the level of turnover per square metre being achieved in each centre or store. Table 45 sets out this information, and includes both convenience and comparison data for each destination.

3.70 The most striking feature of this table is the very high level of convenience turnover performance in the Tesco store at Hardengreen, which was also evident in the 2006/7 study – although the current estimated level of £26,100 per square metre is lower than was being achieved in 2006, after allowing for the effects of inflation. The equivalent figure for the Tesco store in 2006, converted to 2012 prices, was £31,565 per square metre, indicating a 17% reduction in turnover since 2006. This is not surprising, given the store's reduction in market share since then, which is likely to have been caused by strong competition from the stores at Straiton, including the new Asda.

3.71 Nevertheless, a turnover of £26,100 per square metre is more than double the national average level per store achieved by Tesco in 2011, and so indicates continuing pressure on the Hardengreen store, which remains the most popular store in Midlothian by a substantial margin. None of the other stores in Midlothian have a turnover intensity of anything like that of the Tesco Hardengreen, with Sainsbury's store at Straiton achieving £9,983 per square metre, and the new Asda achieving £10,889 per square metre.

3.72 The Tesco store at Eastfield in Penicuik also continues to perform well, at £11,898 per square metre, although it has also lost trade since 2006, around 35% down on its 2006 level, which is a very significant impact – again probably due to increased competition from Straiton with its new and enlarged stores. Thus there has been a redistribution of convenience spending in Midlothian since 2006, and the amount of local spending retained in the Penicuik area has reduced substantially. The previous study showed the Tesco at Eastfield achieving a 63% market share of convenience trade in the Penicuik area, whereas the new survey shows that to have reduced to 48% (Table 20), while the two stores at Straiton now have a 33% market share of Penicuik's spending, compared with 20% achieved by Sainsbury's in 2006.

3.73 Pentland Retail Park is shown to be achieving a very good level of comparison turnover for a centre which has restrictions on the types of goods which may be sold, and where there are many units selling goods which traditionally only generate low levels of sales per square metre. The average comparison turnover per square metre is nearly £5,000, which is a very good performance.

3.74 It is not possible to make a direct comparison with the 2006 figures for Pentland Retail Park, because the previous survey did not cover the outer catchment area which has been used in this study. However, in terms of the trade obtained from within Midlothian, the turnover at Pentland Retail Park in 2012 of £52 million compares with £42.7 million in 2006 (at 2012 prices), an increase of 22%.

3.75 The picture from other centres in Midlothian is one of no more than adequate performance relative to the size and function of the centre, with Bonnyrigg, Mayfield and Newtongrange achieving what appear to be generally sufficient convenience and comparison turnovers – although we will examine this in more detail in the next section of this report dealing with retail capacity. The figures for Gorebridge town centre appear somewhat anomalous, as the estimated level of convenience turnover is very low and the level of comparison turnover is very high. In the smaller centres which have very small amounts of floorspace, and where very few of those interviewed in the survey are likely to mention the centre as a preferred choice, some anomalies are likely to occur, but the amounts of expenditure are very small and do not affect the overall picture

3.76 It is also evident again that the amount of comparison turnover being achieved in Loanhead has been overestimated, probably because of some survey respondents referring to 'Loanhead' instead of 'Straiton' or 'Pentland Retail Park'. Again the figures are not significant, and probably only imply that the comparison turnover at Pentland Retail Park is even higher than has been recorded.

Shoppers' Preferred Centres

3.77 As a conclusion to this stage of the analysis we have produced Figure 8, which shows the level of convenience and comparison turnover being achieved in each centre, and the rank by turnover of each centre. The table helps to show how some centres are more important in one retail sector than the other, but also shows how non-Midlothian destinations are generally more important to Midlothian shoppers for comparison shopping than for convenience shopping. It is particularly striking that the internet is ranked fifth in terms of total retail spending by Midlothian residents, higher than any of Midlothian's town centres. It is also very clear that Straiton is performing a very important function in retaining spending within Midlothian, and helping to resist leakage to Edinburgh.

Figure 8 : Ranking of Retail Destinations by Midlothian Spending 2012								
Rank	**Convenience**	£m		**Comparison**	£m		**Total**	£m
1	Tesco H'green	52.6		Newcraighall	68.8		Straiton	106.6
2	Straiton	43.1		Straiton	63.5		Newcraighall	79.7
3	Tesco Penicuik	17.7		Edin City Centre	39.4		Tesco H'green	60.9
4	Newcraighall	10.9		Internet	21.5		Edin City Centre	40.8
5	Morr'n Moredun	9.7		Dalkeith TC	10.4		Internet	24.0
6	Dalkeith TC	9.0		Gyle Centre	8.4		Dalkeith TC	19.4
7	Penicuik TC	4.7		Tesco H'green	8.3		Tesco Penicuik	18.2
8	Bonnyrigg TC	4.3		Penicuik TC	7.5		Penicuik TC	12.2
9	Newtongrange	2.8		Cameron Toll	5.0		Gyle Centre	9.9
10	Cameron Toll	2.7		Bonnyrigg TC	3.8		Morr'n Moredun	9.7
11	Internet	2.5		Livingston	3.1		Bonnyrigg TC	8.0
12	Musselburgh	2.1		Loanhead	2.4		Cameron Toll	7.6
13	Mayfield	2.1		Ocean Terminal	2.0		Newtongrange	4.3
14	Gorebridge	1.8		Newtongrange	1.6		Loanhead	3.5
15	Gyle Centre	1.5		Gorebridge	1.4		Gorebridge	3.2
16	Edin City Centre	1.5		Tesco Penicuik	0.6		Musselburgh	3.0

Conclusions

3.78 The key features to emerge from the survey of Midlothian shoppers and the application of retail spending estimates to the survey results are:

- There has been a small increase in convenience expenditure leakage since 2006, with comparison leakage remaining virtually unchanged in percentage terms;

- Comparison leakage has increased in monetary terms by just over £20 million from 2006 to 2012;

- Expenditure leakage from Midlothian in 2012 is running at 20% of convenience spending and 61.5% of comparison spending;

- There are compensatory inflows of spending from outside Midlothian which are delivering a 25% boost to convenience turnover and a 38% boost to comparison turnover compared with that which is generated by Midlothian residents;

- The Tesco store at Hardengreen continues to dominate food shopping patterns in Midlothian, but both that store and the Tesco at Penicuik have lost significant amounts of trade since 2006 (17% at Hardengreen, 35% at Penicuik), largely due to the competing stores at Straiton;

- The opening of the new Asda at Straiton has helped to consolidate Straiton as Midlothian's primary shopping destination, but has not increased the overall proportion of Midlothian's convenience spending being absorbed by the major Midlothian foodstores;

- Newcraighall in Edinburgh remains more popular with Midlothian shoppers as a destination for comparison shopping than Straiton;

- The combined market share of convenience and comparison spending achieved by Midlothian's traditional town centres is only a small proportion of the overall available spending, amounting to 14.5% of convenience and 10.3% of comparison expenditure;

- the overall trend in market share for Midlothian's town centres is generally downwards, having fallen from 15.5% convenience and 10.9% comparison share in 2006; however Dalkeith town centre has improved its convenience market share, and Penicuik's share – although small - has improved in both sectors;

- Internet spending on comparison goods has almost doubled since 2006, to £21.5 million.

3.79 In the next section of this report we examine the scope for growth in retail expenditure and the potential for provision of additional retail floorspace in Midlothian.

4 Potential for Additional Retail Floorspace

4.1 This section of the report takes the findings of the household survey and retail expenditure analysis and considers the scope and justification for providing additional retail floorspace within Midlothian. The first step in this task is to consider the overall performance of existing shopping facilities, and to identify whether there are centres or stores which are achieving excessive levels of turnover, which could indicate some scope for the provision of additional retail facilities. It is then necessary to consider the implications of projected growth in expenditure, and whether this growth could provide justification for additional retail development, after taking into account any existing retail development commitments which will absorb some of the projected spending growth.

4.2 Table 46 has been produced to enable a comparison to be made between the estimates of current turnover of Midlothian's retail destinations, as calculated in Tables 16 and 35 and summarised in Table 45, and the 'notional' levels of turnover which might be expected at these destinations, given normal trading circumstances. This 'notional' level of turnover is that which a particular shopping destination would be expected to achieve, given reasonably healthy and balanced trading conditions, in which the centre or store is generating sufficient returns for the trader to justify continued operation, as well as fresh investment and upgrading from time to time. In estimating this level of notional turnover, it is important to have regard to the scale, nature and range of facilities in each centre, and the level of competition elsewhere.

4.3 Many practitioners habitually refer to published statistics on the trading performance of leading national retailers in order to derive estimates of the notional turnover of centres and stores. This practice does not subscribe to that habit, for several reasons. Firstly it is clear that the substantial growth in consumer spending in recent years has fuelled very large increases in turnover and profit for many leading retailers, so that the performance of stores across the UK - as measured by turnover per square metre - has risen in some cases at a remarkable rate, well in excess of the 1-2% per annum which experts in the 1990s used to consider was sufficient to enable a retailer to continue to thrive. Thus there is now a significant gulf between the turnover performance which many of the major retailers are achieving, despite recessionary forces, and the performance which is actually needed to maintain a retail business in a healthy state. Adopting the average national turnover of major UK retailers as a guide to the normal level of a shopping centre will therefore be very likely to exaggerate the level of notional turnover which is appropriate to a particular centre in a particular area.

4.4 Secondly every area of the UK is different, and retailers will be able to achieve different levels of turnover in different areas. The return which they achieve from a given level of turnover will also vary, depending on the cost of rent, rates, staff, supplies and other overheads. A retailer will be able to achieve a more healthy profit from the same turnover in an area where the costs of these overheads are below average, and therefore the level of turnover required to achieve an acceptable return will be lower in such areas.

4.5 Thirdly the competition which traders and shopping centres face will vary from area to area. A centre which faces strong competition from other centres cannot expect to achieve the same level of turnover as a centre which enjoys a large catchment area and limited competition.

4.6 For this reason it is both legitimate and important to ensure that any judgements regarding the notional turnover of centres and stores should take account of local conditions rather than adhering to national statistics on the performance of UK retailers, although such statistics are clearly a useful guide in making such judgements, and have been used already in this study in relation to the Costco and IKEA stores.

Notional and Actual Turnovers

4.7 Table 46 sets out our estimates of the level of convenience and comparison turnover which it would be reasonable to expect in the listed centres and stores, having regard to the nature and role of the centres, the level of local competition, and the other factors discussed above. The fourth column in the table shows the notional turnover per square metre for each centre and the fifth column shows the calculated total annual turnover for 2012, by applying the estimated turnover per square metre to the known amount of retail sales floorspace (from Table 8).

4.8 It is then possible to compare the amount of trade which a centre would be likely to achieve with the amount which is actually drawn, based on the household survey results (Tables 16, 35 and 45). Table 46 shows that it would be reasonable to expect the convenience shopping destinations in Midlothian to achieve a total turnover of around £150 million, and the comparison destinations £172 million. These figures can be compared with the £188 million convenience turnover and £211 comparison turnover which is actually achieved (including the estimates for Costco and IKEA discussed earlier). Thus the overall picture suggests that Midlothian’s shopping facilities are achieving an excess of around £39 million in both convenience and comparison turnovers, which would imply considerable scope for new retail floorspace.

4.9 However, closer examination shows that, for convenience expenditure, virtually all of the surplus is accounted for by the very high turnover of the Tesco store at Hardengreen, with the only other modest excess turnovers being evident in Dalkeith town centre, the Tesco at Eastfield in Penicuik, and the new Asda at Straiton. The smaller town centres in Midlothian are generally trading below what would be regarded as an ideal convenience turnover level relative to their floorspace, and we have already noted that there has been a small decline in the combined market share of the smaller Midlothian centres since 2006, which would suggest that retailers in those centres will have to adjust to a gradual reduction in turnover in future years. There are no indications of any major slump in the fortune of any one centre, but it should be borne in mind that the £38.8 million excess in overall spending disguises a shortfall of spending of around £5 million across the smaller Midlothian centres.

4.10 As was evident from the data regarding the relative proportions of main food and top-up shopping in Midlothian centres, shown in Figure 4, all the smaller centres from Bonnyrigg downwards are used more for top-up shopping than for main food trips, and the importance of their top-up shopping role is likely to increase over time. This may result in some shrinkage of convenience floorspace, and further redefining of the roles of some of the centres.

4.11 As regards the notional and actual turnovers for comparison spending in centres and stores, the £38.7 million excess spending shown in Table 46 results mainly from the high turnover at Pentland Retail Park, with a £5 million excess at Tesco Hardengreen also contributing. The Midlothian town centres generally show only small excesses of turnover, and we have already observed that the Loanhead and Gorebridge excesses are probably anomalies and not an indication of significant surplus comparison expenditure in these locations.

4.12 Thus while the overall surplus figures should be treated with some caution, it is clear that the Tesco at Hardengreen and the units at the Pentland Retail Park are performing well above normal trading levels, indicating scope for additional retail facilities to absorb some of this excess spending and assist in reducing the level of expenditure leakage out of Midlothian. It is worth noting that the notional excess of convenience spending at Hardengreen (£37 million) is actually greater than the total amount of convenience expenditure leakage out of Midlothian (£35.5 million).

Turnover of Committed Retail Floorspace

4.13 Although there are notional excesses of convenience and comparison expenditure within Midlothian in 2012, there are also existing commitments for provision of additional retail floorspace in the council area which could proceed and commence trading within the next few years. Consequently these commitments must be taken into account as part of any assessment of future capacity for additional retail floorspace.

4.14 Table 47 sets out the current commitments and their notional turnovers. The estimated turnovers for the three smaller supermarket proposals for Bonnyrigg, Gorebridge and Penicuik may be optimistic for those locations, but on the basis that investment in new local facilities could assist in reversing the general decline in convenience shopping in these areas, it is right that a reasonable amount of turnover should be ‘reserved’ to support these facilities before consideration is given to the possible scope for other new stores in the council area.

4.15 As is evident from the table, the estimated turnover demand for the convenience commitments is £46.5 million, and for the comparison commitments is £52.5 million. Thus in both cases the notional surpluses revealed in Table 46 are more than absorbed by these commitments.

Potential Expenditure Surpluses in 2021

4.16 The next stage is to project the levels of available expenditure and demands for turnover forward to 2021, which is the ‘horizon’ year for the purposes of forecasting in this study. Tables 48 and 49 show the calculations for both convenience and comparison expenditure.

4.17 Dealing firstly with convenience spending, the top section of Table 48 simply confirms the information presented in Table 46 regarding the estimated £38.78 million surplus of convenience spending in Midlothian. It also illustrates how, on the basis of current levels of leakage and inflow of spending, the amount of convenience expenditure generated by Midlothian residents in 2012 is translated into a total available turnover of £188.45 million, which is the amount being spent in stores and centres in Midlothian in 2012.

4.18 The second section of the table then applies the same percentages of leakage and inflow as apply in 2012 to the estimated convenience expenditure in 2017 (£205.07 million), in order to calculate the level of total convenience spending which could be achieved in Midlothian in 2017 if the current proportions of leakage and inflow remain the same. This produces an estimate of available spending of £218.4 million, an increase of around £30 million compared with 2012.

4.19 From this total available spending must be deducted, firstly, the turnover required to support all existing convenience floorspace, which Table 46 estimates at £149.66 million, and then, secondly, the estimated convenience turnover of the committed retail developments listed in Table 47, which is £46.53 million. When these two amounts are deducted from the £218.4 million, the residual surplus spending is £22.2 million.

4.20 Following the same methodology, the third section of Table 48 projects forward to 2021, by which year the total estimated convenience spending will have risen to £220.8 million. This translates to a total available convenience spend, after allowing for leakage and inflow, of £235.17 million. The same deductions are then made for existing retail floorspace and commitments, leaving a residual surplus of just under £39 million, almost identical to the surplus in 2012 prior to allowing for commitments to new floorspace. Viewed another way, the projected growth in spending from 2012 to 2021 should be enough to supply adequate turnover for all existing commitments, while still leaving the same level of surplus as currently exists.

4.21 The methodology for estimating the potential surplus of comparison expenditure is identical to that for convenience expenditure, except that it is customary to allow for some growth in the turnover of existing and committed floorspace, on the basis that these existing and proposed retail facilities are entitled to share in the growth of spending which is anticipated, rather than directing all spending growth towards new developments. The amount of spending growth which is reserved for existing and committed floorspace has varied over the years according to the amount of overall growth in the retail sector, but generally does not exceed 2% per annum of estimated notional turnover. During times when growth in spending is lower, the allowance is also reduced. For the purposes of this study we have allowed a 1.5% growth in turnover per annum for existing and proposed comparison floorspace.

4.22 Thus the allowance for spending to support existing comparison floorspace is increased from the 2012 level of £172.28 million shown in Table 46 to a total of £185.59 million in 2017, to which is then added an allowance for commitments – which is also increased by around £4 million from the base figure shown in Table 46, again to allow for a share in the benefits of expenditure growth. Thus the total allowance for existing and proposed comparison floorspace is £242.14 million in 2017 – some £70 million more than the total turnover requirement in 2012. This estimate is then projected forward again to 2021, by which time the turnover requirement is £257 million.

4.23 This £257 million which is required to support existing and new floorspace is then deducted from the estimated amount of available spending in 2021, after allowing for leakage and inflow, which generates an estimated surplus in comparison expenditure of £117.65 million.

Estimation of the Potential Scale of Additional Floorspace in 2021

4.24 These estimates of surplus expenditure are difficult to interpret unless they are translated into an estimate of the amount of additional retail floorspace which such levels of spending could support. Furthermore there are two variables which require to be considered, namely the likely levels of leakage and inflow of expenditure which will prevail in 2021.

4.25 The levels of leakage and inflow will be influenced by a variety of factors, including economic conditions, the ability of shoppers to travel, changes in the distribution of population, increased popularity of internet shopping, and the provision of new retail facilities, both in Midlothian and in other areas. The evidence from previous studies is that the provision of improved retail shopping facilities in Midlothian can assist in reducing leakage – for example the reduction in leakage of expenditure between 1999 and 2006, during which period convenience leakage reduced from 32% to 18.6% and comparison leakage fell from 87% to 61.7%. Since then however, as we have seen, leakage of convenience expenditure has increased again, to 20.1%, while comparison leakage has only reduced very slightly to 61.5%, despite improvements to the range of facilities at Straiton.

4.26 At the same time, the substantial growth in internet spending in the comparison sector since 2006, from 4.3% to 8.2% of spending, has brought additional pressures and challenges which need to be taken into account, particularly as growth in internet spending across the UK is growing at a significantly faster rate than growth in High Street spending. There is no consensus as to the level at which a ceiling in internet spending may be reached, but there is also no evidence to suggest that a ceiling will be reached any time soon.

4.27 For these reasons, it is appropriate to be cautious as to the extent to which the provision of further new shopping facilities in Midlothian will help to revive the trend towards reduced convenience leakage and achieve further reductions in comparison leakage.

4.28 Nevertheless it is appropriate to examine what the effect might be of reductions in leakage in terms of the scope for providing additional retail facilities. Tables 50 and 51 set out our calculations for this exercise. In each case the tables show how the amount of residual available expenditure would increase if the rates of leakage were to reduce, and then show what scale of retail floorspace could be supported by this increased availability of spending.

4.29 Dealing firstly with convenience spending, Table 50 shows that leakage from Midlothian could be £44.3 million per annum by 2021 if the current 20% level prevails, but that this could drop to only £30.9 million if the level of leakage reduced to 14%. Even a small reduction to 18% could generate an additional £4.6 million of available spending. Assuming the rate of inflow of expenditure remains at 2012 levels, the total available spending in Midlothian by 2021 could range from £235 million (as shown in Table 48), if current leakage levels continue, to £248.57 million if leakage reduces to 14%.

4.30 After allowing for the turnover of existing retail floorspace and commitments, the projected surplus of convenience expenditure ranges from £39 million at current leakage levels to £52.4 million if leakage drops to 14%. The equivalent gross convenience floorspace which could be supported by these surpluses –

assuming a large store turnover per square metre of £10,000 – ranges from around 6,500 square metres up to 8,700 square. As these floorspace estimates relate only to the convenience element of a large store and not the total floorspace including the area used for comparison sales, this would equate to two stores of a size equivalent to Tesco Hardengreen at the higher end of the scale, or one larger store similar to Sainsbury's at Straiton at the lower end.

4.31 Turning to comparison floorspace, and Table 51, the range of leakage reductions we have considered are from the current level of 61.5% down to 52%, which have the effect of boosting the amount of surplus spending from £117.65, if leakage remains constant, up to £161.68 million if leakage drops to 52%.

4.32 The floorspace equivalents for these levels of surplus expenditure range from 39,000 square metres gross floorspace – at current leakage levels and for 'mainstream' retail floorspace selling high street goods – up to nearly 72,000 square metres – at 52% leakage and assuming 'bulky goods' floorspace of the type more commonly found in retail parks. By way of comparison, Pentland Retail Park has around 26,500 square metres of gross retail floorspace, the Gyle Centre is 33,000 square metres, and the total comparison floorspace in Midlothian is 77,682 square metres.

4.33 While the estimated capacity for additional convenience floorspace is relatively modest, as might be expected given the low growth in convenience spending, the estimated scope for new comparison floorspace is very substantial, and probably far greater than the retail market is likely to be inclined to provide in Midlothian over the next nine years. The challenge ahead will be to provide the locations and sites which will be attractive to developers and retailers, who will then be able to provide the range and quality of new shopping facilities to persuade shoppers to spend more of their money within Midlothian and less elsewhere.

4.34 The problem which the council may face is that Straiton is the only location in Midlothian where retailers are likely to be prepared to locate, because it offers the critical mass and existing wide range of shops and facilities which will encourage others to invest. As we observed in our 2007 report, the three town centres of Dalkeith, Bonnyrigg and Penicuik do not have many characteristics likely to attract retail investors. They each have the advantage of a sizeable local population, but the towns' residents are generally mobile and are used to travelling into Edinburgh for a whole range of purposes, including employment and leisure pursuits as well as for shopping

An Alternative Scenario for Expenditure Growth

4.35 In paragraph 3.11 we mentioned that we would also consider the implications of a lower rate of growth in comparison spending than that indicated by the Pitney Bowes estimates, because of current uncertainties as regards the economy in general and the retail economy in particular.

4.36 The process of forecasting retail growth has a long-established methodology which relies on examination of retail trends over past decades. The long-term growth rates used by analysts are based on trends which go back to the 1960s and 1970s, and which include periods of economic downturn and recession and as well as periods of very strong growth. Just as it is not appropriate to estimate future expenditure growth using the high-growth rates which prevail during economic boom times, nor is it generally appropriate to assume low or zero growth for long-term forecasting during periods of economic stagnation. Long-term trend projections are designed to smooth out the peaks and troughs and provide more reliable estimates of growth in years to come, based on evidence about the cyclical behaviour of the retail economy gathered over the past 50 years.

4.37 Nevertheless, volatility on the stock market, retail business failures, concerns about job losses and the potential knock-on effects on retail spending, and international concerns about countries which are struggling to contain and service their debts, are just some of the many factors which are currently combining to dent the confidence of shoppers and retailers. In such uncertain economic times, which are unprecedented in the modern era, it is reasonable to consider what could be an alternative low-growth scenario.

4.38 Accordingly we have run an analysis which assumes growth in comparison spending of only 3% per annum from 2012 to 2021. There is no precedent for this, as there is no period in the past 40 years when comparison growth has averaged as low as 3% per annum over a nine-year period.

4.39 We have produced Tables 3a and 4a which show the reduced expenditure per head and total comparison expenditure resulting from using a 3% growth rate throughout. The result is a reduction in growth in Midlothian from £202 million to £138.5 million, producing a total comparison spend in 2021 of £400.2 million instead of £464.6 million.

4.40 We have then produced an alternative version of Table 49, numbered 49a, which shows the effect of this reduced growth on the estimated level of surplus spending in 2021. In producing this table, we have reduced the allowance for growth in turnover for existing floorspace from 1.5% to 1% per annum, because of the lower growth in spending. As will be noted from the bottom of Table 49a, the available surplus drops from £117.65 million to £76.9 million, a drop of £40.7 million.

4.41 Table 51a then shows the effect of the reduced growth on the amount of additional comparison floorspace which could be supported by 2021. For ‘mainstream’ high street floorspace, the range (depending on leakage levels) reduces from a minimum of 39,200 square metres to a minimum of 25,636 square metres, with a maximum of around 38,000 square metres instead of 54,000 square metres. For bulky goods retail floorspace, the minimum reduces from around 52,000 square metres to 34,000 square metres, and the maximum from around 72,000 square metres to 51,000 square metres.

4.42 Thus even with a prolonged period of low growth, averaging 3% over 9 years, the level of surplus comparison spending would still be sufficient to support another Pentland Retail Park or a new shopping mall on a similar scale to the Gyle Centre – although a more realistic possibility would be a combination of both types of development on a smaller scale. The conclusion which can be drawn from this analysis is that lack of confidence in the retail market is likely to be a much greater constraint to the provision of new retail floorspace in Midlothian than a low rate of expenditure growth.

4.43 Figure 9 is a summary of the various floorspace surpluses which have been calculated using the different assumptions for leakage and expenditure growth.

The figures have been rounded up or down to the nearest thousand, because it is important not to regard these estimates as precise calculations. Estimating the scope for additional retail floorspace is far from an exact science, and it is not appropriate to attempt to predict the precise amount of retail floorspace which a particular area could accommodate, particularly in these uncertain economic times, but only to use retail capacity analyses to provide guidance as to the broad scale of development which might be supportable, while at the same time having regard to qualitative issues and market realities.

Figure 9 : Scope for Additional Retail Floorspace in Midlothian, 2021

Convenience Floorspace		Leakage 20.1%	Leakage 14%
		6,500 sq m	8,700 sq m
Comparison Floorspace		Leakage 61.5%	Leakage 52%
Mainstream (High Street)		39,000 sq m	54,000 sq m
Mainstream (High Street) low growth		25,000 sq m	38,000 sq m
Bulky Goods		52,000 sq m	72,000 sq m
Bulky Goods low growth		34,000 sq m	51,000 sq m

4.44 The extent to which it may be possible to reduce leakage of expenditure from Midlothian over the next nine years is clearly a matter of judgement. As we have noted, there is evidence that leakage has been successfully reduced in the past, particularly between 1999 and 2006, and reference back to the 1992 Midlothian Shopping Study suggests that reductions in leakage were also achieved between 1992 and 1999. However a comparison between the results of the 2006 and 2012 household surveys suggest that leakage reduction may have reached its limit, particularly given that convenience leakage has actually increased despite the development of a new superstore at Straiton. Furthermore internet spending on comparison goods continues to rise at a faster rate than spending in shopping centres and on high streets. Having regard to this and to the uncertain economic background to this analysis, it may be preferable to assume that reduction in leakage is unlikely and to focus on the results of the analysis which assumes no change in the current percentage levels of leakage.

4.45 However it should also be borne in mind that retail investment is likely to continue over the next nine years in the Edinburgh area, and that new attractions may emerge which will exert an influence over the decisions of Midlothian shoppers as to where to spend their money. Consequently, given the existing surplus of expenditure in Midlothian and the likelihood that this surplus will continue, a ‘do-nothing’ approach within Midlothian as regards new retail provision is not recommended.

Retail Capacity within the Midlothian Sub-Areas

4.46 The final stage in the analysis is to look more closely at the retail capacity implications for the three sub-areas which have been identified within Midlothian – the A7/A68 corridor, the A701 corridor and the Shawfair area. Tables 52 and 53 examine the level of expenditure surplus in each sub-area, having regard not only to the flows of expenditure into and out of Midlothian but also the flows between each sub-area. Tables 54 and 55 present the situation simply in terms of leakage into and out of Midlothian, without taking account of flows between sub-areas. The methodology is identical to that used in Tables 48 and 49 so does not require further explanation.

4.47 The main difference between the two sets of tables is that the Straiton sub-area draws trade from the other two sub-areas, so the retail capacity will appear higher in the Straiton sub-area, and lower in the other two sub-areas, when the flows between the sub-areas is taken into account. It is an unavoidable fact that the retail facilities at Straiton dominate shopping patterns in Midlothian, but it is appropriate to look at what could be the available surplus in the other two sub-areas if the current pattern of net inflow of expenditure into the A701 sub-area is set aside.

4.48 Looking firstly at Table 52, the total convenience expenditure surplus to 2021 splits 57.2% (£22.3 million) in favour of the A7/A68 corridor, 41.2% (£16 million) to the A701 corridor, and 1.6% (£0.6 million) to Shawfair. The £22 million in the A7/A68 corridor can be compared with the existing turnover of Midlothian's three superstores, and it is clear that such a turnover compares favourably with that being taken from Midlothian shoppers at both the Asda and Sainsbury's stores at Straiton, suggesting scope for one new superstore in the A7/A68 corridor. The remaining surplus in the A701 corridor of £16 million is close to the turnover amount currently taken in the Tesco store at Eastfield, Penicuik.

4.49 For comparison spending (Table 53), 78% of the surplus (£92 million) lies in the A701 corridor, and only 22% (£25.6 million) in the A7/A68 corridor, but even £25 million is more than double the current comparison turnover of Dalkeith town centre, while £92 million is close to the current total turnover of the Pentland Retail Park, including all inflows from other areas.

4.50 Turning to the situation when the net inflow of expenditure into the Straiton area is ignored, Table 54 shows that almost all (92%) of the convenience surplus lies in the A7/A68 sub-area, 19% in the Shawfair sub-area, and a negative amount in the A701 Straiton sub-area. In other words, when the effects of flows of expenditure from the A7/A68 and Shawfair sub-areas to the two superstores at Straiton are discounted, there is a shortfall of expenditure in the A701 Straiton area.

4.51 Similarly in Table 55, when the comparison expenditure situation is examined, the effect of discounting existing expenditure flows into the Straiton area results in a much higher capacity for comparison floorspace in the A7/A68 sub-area, and a much reduced surplus in the A701 sub-area, while the surplus in the Shawfair area increases from virtually zero to £9 million.

4.52 We have also produced Tables 53a and 55a, which contain the same analysis as in Tables 53 and 55, but based on the reduced comparison growth rate of 3% per annum from 2012 to 2021. The effect of the reduced growth rate is to further emphasise the difference between the results of the sub-area capacity analysis depending on whether the inflow of expenditure into the A701 Straiton sub-area is taken into account or not. The £57.6 million surplus in the A701 Straiton sub-area assuming current inflows (Table 53a) drops to only £12 million when the inflows are ignored (Table 55a), while the surplus in the A7/A68 sub-area rises from £19 million to £57 million.

Retail Capacity in the Midlothian Sub-Areas - Conclusions

4.53 An implication of this sub-area analysis is that consideration should be given to encouraging further provision of convenience and comparison floorspace in the A7/A68 sub-area, and potentially also in the Shawfair area. The scope for new retail floorspace in Shawfair is relatively limited when viewed in isolation, but Shawfair has a close relationship with the A7/A68 sub-area and is located on the Borders Railway corridor, and as such there is a case for considering the two sub-areas together when examining the scope for potential new retail floorspace. Furthermore it is also appropriate to take account of potential expenditure from the Edinburgh area being available to support floorspace at Shawfair, having regard to the fact that this area of future expansion lies immediately adjacent to the Edinburgh boundary.

4.54 With around £43 million surplus convenience expenditure (Table 54) in the combined A7/A68 and Shawfair sub-areas by 2021, and £78 million comparison surplus (Table 55), and with further growth anticipated in the Shawfair area after 2021, it is clear that there is significant scope for new retail floorspace in this combined corridor. Part of the strategy for expansion in the Shawfair area is a new town centre to form the focus of a new community, and these figures would indicate substantial potential for supporting a new town centre at Shawfair while also enabling other retail investment further south in the A7/A68 corridor as well.

4.55 However, as had been observed already, the primary obstacle to achieving retail investment in the A7/A68 corridor and Shawfair will be the perception in the retail industry that Straiton is the only location within Midlothian where investment can be justified. The difficulties in recent years associated with seeking to encourage retail investment in Dalkeith town centre are an example of this obstacle. Careful consideration would have to be given to the question as to whether it would be possible to alter the prevailing patterns of expenditure flows in favour of the A7/A68 sub-area and Shawfair by promoting attractive new retail facilities in appropriate locations within these areas.

Conclusions

4.56 The primary findings to emerge from this analysis of the potential for additional retail floorspace in Midlothian to 2021 are

- There is an estimated current surplus of around £39 million of expenditure in both the convenience and comparison sectors
- The surplus of convenience expenditure is due primarily to high trading levels in the main foodstores, which obscures a £5 million notional deficit of turnover in the smaller town centres in Midlothian
- The surplus of comparison spending is almost all due to high trading levels at the Pentland Retail Park at Straiton
- The estimated convenience surplus in 2021 is £39 million, the same as in 2012, but after allowing for the implementation of all current development commitments

- The comparison surplus in 2021, assuming current percentage levels of leakage and inflow remain constant, is around £118 million

- The additional gross retail floorspace which could be supported by these surpluses amounts to around 6,500 square metres in the convenience sector and between 25,000 and 39,000 square metres of 'High Street' retail floorspace or between 34,000 and 52,000 square metres of 'bulky goods' retail floorspace, depending on expenditure growth rates achieved; a reduction in leakage of expenditure would increase the floorspace potential

- These levels of surplus equate broadly to one or possibly two new superstores in the convenience sector, and either a new shopping centre similar to the Gyle Centre or a retail park larger than Pentland Retail Park, although a combination of both types of development on a smaller scale would be a more realistic aspiration

- An analysis of the potential for new retail floorspace by Midlothian sub-area indicates convenience capacity being located primarily in the A7/A68 sub-area, and comparison capacity being primarily in the A701 Straiton sub-area if existing expenditure flows into that area are maintained, but primarily in the A7/A68 sub-area if those existing inflows are discounted

- If the A7/A68 and Shawfair areas are examined together, the case for retail investment in this combined corridor is even more evident

- In these challenging economic times, any new retail investment will only take place if developers and retailers can be persuaded that the investment will produce adequate returns, and retailers' locational preferences will be of great importance.

5 Conclusions

5.1 Midlothian's shopping facilities have improved very substantially over the past twenty-five years. From a time when most comparison shopping expenditure and a substantial proportion of convenience spending was exported from Midlothian to Edinburgh, both to the city centre and to new facilities in the south of Edinburgh such as Cameron Toll and Fort Kinnaird, Midlothian now supports its own attractive modern shopping facilities, including a retail park with a wide range of retailers, an IKEA warehouse and Costco, and three superstores, two at Straiton and one at Hardengreen. Retailers have a confidence in Midlothian which was lacking twenty-five years ago.

5.2 This investment has paid dividends in the form of a higher level of expenditure retention within Midlothian for both convenience and comparison goods, currently running at 20% and 61.5% of spending respectively. However those proportions compare with 18.6% and 61.7% in 2006, so convenience leakage has increased and comparison leakage has remained virtually static, despite improvements to retail facilities in both sectors. Given the recent development of a new Asda superstore at Straiton, an increase in convenience leakage is surprising, and suggests that a ceiling may have been reached in terms of the extent to which Midlothian shoppers can be persuaded to shop within the council area.

5.3 However the past six years have seen significant growth in spending via the internet in Midlothian, with a rise from only 0.3% of convenience spending in 2006 to 1.4% in 2012, and with comparison spending via the internet increasing from 4.3% to 8.2%. Meanwhile the only increase in convenience leakage has been a small amount to Musselburgh, while convenience leakage to Edinburgh has remained constant in percentage terms, and comparison leakage to Edinburgh and other areas has reduced since 2006. Internet spending on food and groceries is largely captured by the store located closest to the home of the shopper placing the order, so probably does not contribute to leakage from Midlothian. Having regard to these factors, the leakage situation appears less disappointing.

5.4 Spending via the internet is expected to continue to rise in the medium term, and the rate of growth has been accelerating in recent years, so this form of shopping will remain a substantial challenge to Midlothian's ability to retain retail spending in the years ahead.

5.5 However even taking a pessimistic view of likely growth in spending over the next decade, our analysis suggests that there will be significant scope for the provision of additional retail floorspace in Midlothian to 2021. Growth in the convenience sector will be sufficient to meet the turnover requirements of existing commitments to new retail floorspace, while leaving scope for the equivalent of one new superstore plus other additional convenience floorspace. Growth in the comparison sector over the next nine years, even at an average rate of growth lower than during any similar period since the 1970s, will provide scope for a very substantial increase in comparison floorspace in Midlothian, equivalent to a shopping mall similar in scale to the Gyle Centre or a retail park larger than Pentland Retail Park, but ideally a combination of both types of floorspace on a smaller scale.

5.6 Looking at this scope for new retail floorspace on a sub-area basis – the A7/A68 corridor, the A701 corridor and the Shawfair area – the capacity for convenience floorspace falls strongly within the A7/A68 corridor, which is not surprising given the higher population in that sub-area compared with the A701 corridor, and also because the latter sub-area has two superstores whereas the A7/A68 corridor only has one.

5.7 The scope for additional comparison floorspace by sub-area can be interpreted in two ways, depending on whether the existing strong inflow of expenditure into the A701 corridor from the other sub-areas is considered to be a fixed factor or not. If the expenditure inflow to the A701 Straiton sub-area is regarded as inevitable, the spare capacity in 2021 is larger within that sub-area.

5.8 However if the current inflow to Straiton is discounted, the larger capacity for new floorspace is then found in the A7/A68 sub-area, particularly if expenditure growth is at the lower end of the predicted range. Combining the A7/A68 sub-area with the Shawfair area – which also lies on the A7/A68/Borders Rail corridor – further emphasises the case for additional retail investment in this combined area. A judgement needs to be made as to the benefits, and deliverability, of supporting further development at Straiton, compared with the option of encouraging new comparison shopping facilities in the A7/A68 corridor, including Shawfair.

5.9 Given the predicted scale of the surplus spending by 2021, and the likelihood that a lack of further retail investment in Midlothian and growth in internet spending will result in leakage levels rising again, there are strong grounds for seeking to encourage new retail investment in Midlothian – and particularly in the eastern part of the council area - during the period to 2021. However the key factor in securing any such investment will be in ensuring that the requirements of prospective retailers are met. Currently Straiton is the only location in Midlothian with the obvious success and critical mass of comparison floorspace which lends itself to attracting further investment, particularly from sceptical retailers with major concerns about future trading prospects in a recessionary economic environment. Therefore a major issue for the council to consider will be the extent to which there are other locations which could be presented as offering good opportunities for new retail investment.

5.10 Any such initiative would have to be based on sound economic justification, and only promoted after appropriate discussion with the retail industry and its representatives. Proximity to road and public transport networks and to the main concentrations of population will be key factors, and retailers' locational preferences will be of great importance. This study has demonstrated that the expenditure will be available to support new floorspace, but the next challenge will be to create the conditions on the ground which will ensure that the investment can be captured.

5.11 Alongside any initiative to promote new retail development, due regard should be had to the future of the smaller Midlothian town centres. Although these centres appear to have succeeded in adjusting to their reduced and more localised role over the past two decades, during which an entirely new shopping centre has been developed which now dominates shopping in Midlothian, this study has shown that the market share of these smaller centres continues to decline.

5.12 Therefore there will be a need to consider ways of assisting these centres through further stages of adjustment, looking at ways of consolidating the core of each centre and maintaining choice, vibrancy and a pleasant environment for those local shoppers who rely on the facilities still offered by these centres. Their role will remain important for the foreseeable future.

Midlothian Retail Study 2012

Appendix 1 - Tables 1 to 55a

RDPC

Table 1
Population Estimates, 2001 - 2021

Midlothian Council Area

2001	(census)	80,941
2009		80,745
2010		81,156
2012		82,277
2017		90,379
2021		96,441

Source: 2001 Census and Midlothian Council

Edinburgh / East Lothian Outer Catchment

2001	(census)	111,452
2009		115,529
2010		116,576
2012		118,993
2017		124,657
2021		129,153

Source: 2001 Census and Pitney Bowes Business Insight

Table 2
Estimated Population 2001 - 2021, Midlothian Council Area and Edinburgh / East Lothian Outer Catchment

Zone	Area	2001	2009	2010	2012	2017	2021
1	Danderhall	5,845	5,623	5,595	5,577	6,405	7,731
2	Dalkeith Town	9,032	9,593	9,830	10,247	11,684	11,820
3	Penicuik	17,118	16,741	16,722	16,672	17,976	18,130
4	Mayfield / Newtongrange	13,502	13,483	13,590	13,703	14,746	14,836
5	Gorebridge	7,480	7,706	7,728	7,817	9,399	11,209
6	Loanhead / Damhead	6,636	6,409	6,374	6,440	6,497	6,662
7	Bonnyrigg & Lasswade	15,207	15,122	15,280	15,809	16,807	17,708
8	Rosewell	1,296	1,513	1,506	1,495	1,854	2,264
9	Roslin / Bilston	3,127	2,942	2,927	2,912	3,394	4,436
10	Pathhead	1,698	1,611	1,603	1,606	1,616	1,646
Total	Midlothian	80,941	80,743	81,155	82,278	90,378	96,442
11	Edinburgh South West	27,820	27,999	28,100	28,232	28,547	28,778
12	Edinburgh South East	35,744	36,496	36,480	37,064	39,037	40,612
13	Musselburgh	24,789	25,246	25,371	25,629	26,225	26,793
14	Western East Lothian	23,099	25,788	26,625	28,068	30,848	32,970
Total	Outer Catchment	111,452	115,529	116,576	118,993	124,657	129,153
Total	Midlothian + Outer Catchment	192,393	196,272	197,731	201,271	215,035	225,595

Source: 2001 Census, Midlothian Council and Pitney Bowes Business Insight

Table 3
Expenditure per Head
2012 prices

		Midlothian	Outer Catchment
2009*	Convenience	£2,239	£2,205
	Comparison	£2,993	£2,970
2010 #	Convenience	£2,219	£2,184
	Comparison	£3,069	£3,046
2011 #	Convenience	£2,162	£2,129
	Comparison	£3,110	£3,086
2012 #	Convenience	£2,151	£2,117
	Comparison	£3,180	£3,156
2017 #	Convenience	£2,269	£2,234
	Comparison	£4,093	£4,061
2021 #	Convenience	£2,290	£2,254
	Comparison	£4,817	£4,780

* PItney Bowes assessment March 2012
\# growth projections from Pitney Bowes / Oxford Economics, Spending Update Nov 2011

Table 4
Total Retail Expenditure
2012 prices

Year	Sector	Midlothian		Outer Catchment		Total	
		Spend £m	Growth £m	Spend £m	Growth £m	Spend £m	Growth £m
2012	Convenience	£176.95		£251.92		£428.87	
	Comparison	£261.67		£375.53		£637.20	
2017	Convenience	£205.07	£28.13	£278.45	£26.53	£483.52	£54.66
	Comparison	£369.90	£108.23	£506.28	£130.75	£876.18	£238.99
2021	Convenience	£220.82	£15.75	£291.11	£12.66	£511.93	£28.41
	Comparison	£464.57	£94.66	£617.36	£111.08	£1,081.92	£205.74

Table 3a
Expenditure per Head with Reduced Comparison Growth Rate
2012 prices

		Midlothian	Outer Catchment
2009*	Convenience	£2,239	£2,205
	Comparison	£2,993	£2,970
2010 #	Convenience	£2,219	£2,184
	Comparison	£3,069	£3,046
2011 #	Convenience	£2,162	£2,129
	Comparison	£3,110	£3,086
2012 #	Convenience	£2,151	£2,117
~	Comparison	£3,180	£3,156
2017 #	Convenience	£2,269	£2,234
~	Comparison	£3,687	£3,659
2021 #	Convenience	£2,290	£2,254
~	Comparison	£4,150	£4,118

* PItney Bowes assessment March 2012
\# growth projections from Pitney Bowes / Oxford Economics, Spending Update Nov 2011
~ assumes growth rate of 3% from 2012 onwards

Table 4a
Total Retail Expenditure with Reduced Comparison Growth Rate
2012 prices

Year	Sector	Midlothian		Outer Catchment		Total	
		Spend £m	Growth £m	Spend £m	Growth £m	Spend £m	Growth £m
2012	Convenience	£176.95		£251.92		£428.87	
	Comparison	£261.67		£375.53		£637.20	
2017	Convenience	£205.07	£28.13	£278.45	£26.53	£483.52	£54.66
	Comparison	£333.21	£71.54	£456.06	£80.53	£789.27	£152.07
2021	Convenience	£220.82	£15.75	£291.11	£12.66	£511.93	£28.41
	Comparison	£400.19	£66.98	£531.81	£75.75	£932.01	£142.74

Table 5
Estimated Convenience Expenditure by Area, 2012 - 2021
2012 prices

Zone	Area	2012 £m	2017 £m	2021 £m
1	Danderhall	11.99	14.53	17.70
2	Dalkeith Town	22.04	26.51	27.06
3	Penicuik	35.85	40.79	41.51
4	Mayfield / Newtongrange	29.47	33.46	33.97
5	Gorebridge	16.81	21.33	25.67
6	Loanhead / Damhead	13.85	14.74	15.25
7	Bonnyrigg & Lasswade	34.00	38.14	40.55
8	Rosewell	3.22	4.21	5.18
9	Roslin	6.26	7.70	10.16
10	Pathhead	3.45	3.67	3.77
	Total for Midlothian	**176.95**	**205.07**	**220.82**
11	Edinburgh South West	59.77	63.77	64.87
12	Edinburgh South East	78.47	87.20	91.54
13	Musselburgh	54.26	58.58	60.39
14	Western East Lothian	59.42	68.91	74.31
	Total for Outer Catchment	251.92	278.45	291.11
	Total for Midlothian + Outer Catchment	428.87	483.52	511.93

Source: Tables 2 and 3

Table 5a
Estimated Convenience Expenditure by Sub-Areas, 2012 - 2021
2012 prices

Area	2012 £m	2017 £m	2021 £m
A7/A68/Borders Rail Corridor (Zones 2,4,5,7,8,10)	108.99	127.31	136.20
A701 Corridor (Zones 3,6,9)	55.97	63.23	66.92
Shawfair area (Zone 1)	11.99	14.53	17.70
Total	176.95	205.07	220.82

Table 6
Estimated Comparison Expenditure by Area, 2012 - 2021
2012 prices

Zone	Area	2012 £m	2017 £m	2021 £m
1	Danderhall	17.74	26.21	37.24
2	Dalkeith Town	32.59	47.82	56.94
3	Penicuik	53.02	73.57	87.33
4	Mayfield / Newtongrange	43.58	60.35	71.47
5	Gorebridge	24.86	38.47	53.99
6	Loanhead / Damhead	20.48	26.59	32.09
7	Bonnyrigg & Lasswade	50.28	68.79	85.30
8	Rosewell	4.75	7.59	10.91
9	Roslin	9.26	13.89	21.37
10	Pathhead	5.11	6.61	7.93
	Total for Midlothian	261.67	369.90	464.57
11	Edinburgh South West	89.10	115.94	137.56
12	Edinburgh South East	116.97	158.54	194.13
13	Musselburgh	80.88	106.51	128.07
14	Western East Lothian	88.58	125.29	157.60
	Total for Outer Catchment	375.53	506.28	617.36
	Total for Midlothian + Outer Catchment	637.20	876.18	1081.92

Source: Tables 2 and 3

Table 6a
Estimated Comparison Expenditure by Sub-Areas, 2012 - 2021
2012 prices

Area	2012 £m	2017 £m	2021 £m
A7/A68/Borders Rail Corridor (Zones 2,4,5,7,8,10)	161.17	229.63	286.53
A701 Corridor (Zones 3,6,9)	82.76	114.06	140.79
Shawfair area (Zone 1)	17.74	26.21	37.24
Total	261.67	369.90	464.57

Table 7
Estimated Comparison Expenditure by Category, 2012
2012 prices

Zone	Area	Clothing Footwear £m	Sports Goods £m	CDs DVDs £m	Audio Visual £m	Portable Domest £m	Non-port Domest £m	Furniture Carpets £m	Textiles Soft Furns £m	DIY £m	Crockery Pots £m	Chemist Goods £m	Jewellery Clocks £m	Bicycles Toys £m	Other £m	Total £m
1	Danderhall	4.44	0.89	0.51	1.65	0.33	0.22	1.64	0.65	1.08	0.35	1.86	0.59	0.66	2.86	17.74
2	Dalkeith Town	8.16	1.64	0.94	3.04	0.60	0.40	3.01	1.19	1.98	0.65	3.42	1.08	1.22	5.26	32.59
3	Penicuik	13.28	2.67	1.53	4.95	0.97	0.65	4.90	1.93	3.22	1.06	5.56	1.75	1.99	8.56	53.02
4	Mayfield / Newtongrange	10.91	2.19	1.26	4.07	0.80	0.53	4.03	1.58	2.65	0.87	4.57	1.44	1.63	7.03	43.58
5	Gorebridge	6.23	1.25	0.72	2.32	0.46	0.30	2.30	0.90	1.51	0.50	2.61	0.82	0.93	4.01	24.86
6	Loanhead / Damhead	5.13	1.03	0.59	1.91	0.38	0.25	1.89	0.74	1.24	0.41	2.15	0.68	0.77	3.31	20.48
7	Bonnyrigg & Lasswade	12.59	2.53	1.45	4.69	0.92	0.61	4.65	1.83	3.06	1.01	5.28	1.66	1.88	8.11	50.28
8	Rosewell	1.19	0.24	0.14	0.44	0.09	0.06	0.44	0.17	0.29	0.10	0.50	0.16	0.18	0.77	4.75
9	Roslin	2.32	0.47	0.27	0.86	0.17	0.11	0.86	0.34	0.56	0.19	0.97	0.31	0.35	1.49	9.26
10	Pathhead	1.28	0.26	0.15	0.48	0.09	0.06	0.47	0.19	0.31	0.10	0.54	0.17	0.19	0.82	5.11
	Total for Midlothian	65.53	13.17	7.57	24.41	4.79	3.19	24.20	9.52	15.90	5.24	27.46	8.66	9.81	42.23	261.67
	Share by Category (%)	25.0%	5.0%	2.9%	9.3%	1.8%	1.2%	9.2%	3.6%	6.1%	2.0%	10.5%	3.3%	3.7%	16.1%	100%

	Area	Clothing Footwear £m	Sports Goods £m	CDs DVDs £m	Audio Visual £m	Portable Domest £m	Non-port Domest £m	Furniture Carpets £m	Textiles Soft Furns £m	DIY £m	Crockery Pots £m	Chemist Goods £m	Jewellery Clocks £m	Bicycles Toys £m	Other £m	Total £m
11	Edinburgh South West	22.51	4.50	2.58	8.31	1.63	1.08	8.18	3.22	5.36	1.77	9.31	2.95	3.34	14.38	89.10
12	Edinburgh South East	29.55	5.90	3.38	10.91	2.14	1.42	10.74	4.22	7.04	2.32	12.22	3.87	4.38	18.88	116.97
13	Musselburgh	20.43	4.08	2.34	7.54	1.48	0.98	7.42	2.92	4.87	1.61	8.45	2.68	3.03	13.06	80.88
14	Western East Lothian	22.37	4.47	2.56	8.26	1.62	1.07	8.13	3.20	5.33	1.76	9.25	2.93	3.32	14.30	88.58
	Total for Outer Catchment	94.86	18.95	10.86	35.01	6.88	4.54	34.47	13.56	22.59	7.46	39.23	12.42	14.08	60.62	375.53
	Share by Category (%)	25.3%	5.0%	2.9%	9.3%	1.8%	1.2%	9.2%	3.6%	6.0%	2.0%	10.4%	3.3%	3.7%	16.1%	100%

Table 8
Midlothian Retail Floorspace 2012

Centre	Convenience		Comparison	
	Gross sq m	Sales sq m	Gross sq m	Sales sq m
Dalkeith TC :				
Supermarkets	1,500	900		
Other	932	559		
Total Dalkeith town centre	**2,432**	**1,459**	**8,029**	**4,817**
Dalkeith other	1,415	849	132	79
Tesco Hardengreen	4,175	2,296	1,789	984
Bonnyrigg TC :				
Supermarkets	1,514	908		
Other	778	467		
Total Bonnyrigg town centre	**2,292**	**1,375**	**2,670**	**1,735**
Bonnyrigg other	614	368	130	78
Loanhead TC	**1,033**	**620**	**290**	**189**
Loanhead other	405	243	38	23
Mayfield TC	**1,104**	**662**	**273**	**177**
Mayfield other	279	167	124	74
Newtongrange TC	**1,711**	**1,027**	**740**	**518**
Newtongrange other	259	155	0	0
Gorebridge TC	**612**	**367**	**145**	**94**
Gorebridge Hunterfield	1,451	871	0	0
Rest of Gorebridge	648	389	194	116
Penicuik TC :				
Supermarkets	936	562		
Other	1,237	742		
Total Penicuik town centre	**2,173**	**1,304**	**3,338**	**2,170**
Penicuik other	374	224	799	479
Penicuik Tesco	2,700	1,620	900	540
Straiton				
Pentland Retail Park	0	0	26,539	19,901
Sainsbury	6,140	3,377	2,047	1,126
Asda	4,831	2,717	2,601	1,463
M&S Simply Food	929	557	0	0
Costco	3,979	3,383	8,741	7,430
IKEA	0	0	18,000	16,200
Total Straiton	**15,879**	**10,034**	**57,928**	**46,119**
Danderhall	506	304	42	25
Roslin	573	344	121	73
Other Local Shops	787	472	0	0
Total	**41,422**	**25,151**	**77,682**	**58,291**

Source: Midlothian Council

09/05/12

Table 9
Main Food, Supplementary and Top-Up Convenience Spending by Area, 2012
2012 prices

Zone	Area	Total Spend £m	Top-up Spend £m	Main Food Spend £m	Spend in Main Store %	Spend in Main Store £m	Spend in 2nd Choice Store (£m)
1	Danderhall	11.99	1.98	10.01	75.0%	7.51	2.50
2	Dalkeith Town	22.04	2.40	19.64	79.3%	15.57	4.07
3	Penicuik	35.85	3.90	31.96	79.4%	25.38	6.58
4	Mayfield / Newtongrange	29.47	3.81	25.66	81.2%	20.83	4.83
5	Gorebridge	16.81	2.21	14.60	74.0%	10.80	3.80
6	Loanhead / Damhead	13.85	1.94	11.91	76.3%	9.09	2.82
7	Bonnyrigg & Lasswade	34.00	4.70	29.30	80.8%	23.68	5.63
8	Rosewell	3.22	0.25	2.97	70.0%	2.08	0.89
9	Roslin	6.26	1.06	5.21	77.0%	4.01	1.20
10	Pathhead	3.45	0.22	3.23	78.4%	2.54	0.70
	Total Midlothian	**176.95**	**22.46**	**154.49**		**121.48**	**33.01**
11	Edinburgh South West	59.77	7.57	52.20	77.1%	40.23	11.98
12	Edinburgh South East	78.47	11.51	66.96	77.1%	51.61	15.35
13	Musselburgh	54.26	9.94	44.32	75.7%	33.54	10.78
14	Western East Lothian	59.42	6.26	53.16	78.6%	41.78	11.38
	Total Outer Catchment	251.92	35.29	216.63		167.15	49.48
	Total Midlothian + Outer c/a	428.87	57.74	371.13		288.63	82.49

Note: Total spend from Table 4 ; weighting derived from Household Survey Results 2012

Table 10
Percentage Distribution of Main Food Spend 2012
using 2012 survey results

Destination / Origin:	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian
Tesco Hardengreen	31.8%	44.9%	0.0%	51.1%	55.6%	5.6%	62.4%	50.0%	4.0%	60.0%	0.0%	4.0%	0.0%	4.8%
Sainsbury Straiton	0.0%	4.3%	15.9%	3.4%	1.9%	50.7%	5.0%	20.0%	36.0%	10.0%	11.4%	8.3%	1.2%	0.8%
Asda Straiton	6.8%	1.4%	17.8%	9.1%	9.3%	26.8%	10.9%	20.0%	16.0%	0.0%	2.4%	8.3%	1.8%	0.8%
Tesco Eastfield Penicuik	0.0%	0.0%	53.3%	0.0%	0.0%	1.4%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda Jewel	18.2%	15.9%	0.0%	13.6%	5.6%	1.4%	1.0%	0.0%	0.0%	10.0%	0.0%	5.1%	24.6%	36.5%
Morrisons Moredun	15.9%	7.2%	0.0%	8.0%	7.4%	4.2%	5.0%	0.0%	4.0%	10.0%	0.0%	32.5%	0.0%	0.0%
Bonnyrigg Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Dalkeith Town Centre	11.4%	13.0%	0.0%	2.3%	3.7%	0.0%	0.0%	10.0%	0.0%	10.0%	0.0%	1.1%	0.0%	0.0%
Morrions Hunters Tryst	0.0%	0.0%	0.9%	0.0%	0.0%	1.4%	0.0%	0.0%	8.0%	0.0%	27.5%	1.1%	0.0%	0.0%
Sainsbury Cameron Toll	6.8%	1.4%	0.0%	0.0%	1.9%	1.4%	1.0%	0.0%	4.0%	0.0%	3.6%	22.4%	1.2%	1.6%
Newtongrange	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Colinton Mains	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	31.1%	1.1%	0.0%	0.0%
Scotmid Hunterfield Gorebridge	0.0%	0.0%	0.0%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penicuik Town Centre	0.0%	0.0%	7.5%	0.0%	0.0%	2.8%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edinb incl Morn'gside & Craigl'th	2.3%	5.8%	1.9%	2.3%	1.9%	0.0%	1.0%	0.0%	4.0%	0.0%	19.8%	11.2%	2.9%	3.2%
Marks & Spencer Straiton	0.0%	1.4%	0.9%	0.0%	0.0%	1.4%	1.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Musselburgh	2.3%	0.0%	0.9%	0.0%	1.9%	0.0%	2.0%	0.0%	4.0%	0.0%	0.0%	0.0%	63.7%	24.6%
Internet / Delivered	2.3%	1.4%	0.9%	3.4%	1.9%	0.0%	3.0%	0.0%	0.0%	0.0%	2.4%	4.0%	1.2%	2.4%
Mayfield	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costco Straiton	0.0%	1.4%	0.0%	0.0%	0.0%	1.4%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Roslin	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Loanhead town centre	0.0%	1.4%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gyle Centre	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	2.0%	0.0%	4.0%	0.0%	0.6%	1.1%	0.0%	0.0%
Gorebridge town centre	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%
Marks & Spencer Newcraighall	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	1.6%
Danderhall	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Shops	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%
Other outside Midlothian	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	23.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 11
Percentage Distribution of Supplementary Main Food Spend 2012
using 2012 survey results

Origin: / Destination	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian
Tesco Hardengreen	12.1%	19.1%	3.8%	27.0%	22.0%	7.7%	20.3%	28.6%	4.8%	14.3%	0.0%	8.6%	0.0%	5.1%
Sainsbury Straiton	0.0%	8.5%	19.0%	9.5%	9.8%	30.8%	12.2%	14.3%	19.0%	14.3%	11.9%	11.7%	2.4%	5.1%
Asda Straiton	12.1%	8.5%	26.6%	11.1%	14.6%	40.4%	24.3%	14.3%	28.6%	14.3%	4.0%	3.0%	0.0%	0.0%
Tesco Eastfield Penicuik	0.0%	0.0%	24.1%	0.0%	0.0%	3.8%	0.0%	0.0%	9.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda Jewel	12.1%	8.5%	1.3%	12.7%	9.8%	0.0%	6.8%	14.3%	0.0%	28.6%	1.0%	3.0%	33.3%	16.5%
Morrisons Moredun	21.2%	4.3%	3.8%	7.9%	12.2%	1.9%	12.2%	14.3%	4.8%	0.0%	1.0%	20.3%	0.0%	0.0%
Bonnyrigg Town Centre	0.0%	2.1%	0.0%	1.6%	0.0%	0.0%	5.4%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
Dalkeith Town Centre	12.1%	23.4%	0.0%	7.9%	4.9%	0.0%	2.7%	0.0%	0.0%	14.3%	0.0%	0.0%	1.6%	0.0%
Morrions Hunters Tryst	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.8%	0.0%	0.0%	0.0%
Sainsbury Cameron Toll	18.2%	4.3%	0.0%	4.8%	2.4%	0.0%	1.4%	0.0%	0.0%	0.0%	5.9%	17.3%	1.6%	1.3%
Newtongrange	0.0%	2.1%	0.0%	7.9%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Colinton Mains	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	24.8%	1.5%	0.0%	0.0%
Scotmid Hunterfield Gorebridge	0.0%	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penicuik Town Centre	0.0%	0.0%	13.9%	0.0%	0.0%	1.9%	1.4%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edinb incl Morn'gside & Craigl'th	6.1%	6.4%	1.3%	4.8%	2.4%	0.0%	1.4%	0.0%	4.8%	0.0%	18.8%	19.8%	11.1%	2.5%
Marks & Spencer Straiton	0.0%	2.1%	1.3%	0.0%	0.0%	7.7%	4.1%	0.0%	4.8%	0.0%	6.9%	5.6%	0.0%	0.0%
Musselburgh	3.0%	2.1%	0.0%	0.0%	2.4%	1.9%	2.7%	0.0%	4.8%	14.3%	1.0%	6.1%	47.6%	31.6%
Internet / Delivered	0.0%	2.1%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Mayfield	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%
Costco Straiton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	1.0%	1.5%	0.0%	0.0%
Roslin	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Loanhead town centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Gyle Centre	0.0%	0.0%	2.5%	0.0%	2.4%	1.9%	2.7%	0.0%	4.8%	0.0%	4.0%	1.5%	0.0%	2.5%
Gorebridge town centre	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%
Marks & Spencer Newcraighall	0.0%	2.1%	0.0%	1.6%	2.4%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	3.8%
Danderhall	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%	0.0%
Local Shops	0.0%	4.3%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other outside Midlothian	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 12
Percentage Distribution of Top-up Spend 2012
using 2012 survey results

Origin: Destination	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian
Tesco Hardengreen	12.5%	16.7%	1.4%	12.5%	20.0%	0.0%	34.2%	16.7%	0.0%	33.3%	0.0%	0.0%	0.0%	1.1%
Sainsbury Straiton	0.0%	2.4%	1.4%	1.6%	0.0%	26.4%	1.4%	0.0%	6.7%	0.0%	0.9%	4.1%	0.0%	0.0%
Asda Straiton	0.0%	0.0%	2.8%	1.6%	5.0%	22.6%	0.0%	0.0%	13.3%	0.0%	0.9%	3.1%	0.0%	0.0%
Tesco Eastfield Penicuik	0.0%	0.0%	52.1%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%
Asda Jewel	0.0%	2.4%	1.4%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	2.1%
Morrisons Moredun	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	21.6%	0.0%	0.0%
Bonnyrigg Town Centre	0.0%	0.0%	0.0%	1.6%	2.5%	0.0%	47.9%	16.7%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Dalkeith Town Centre	31.3%	45.2%	1.4%	12.5%	5.0%	0.0%	5.5%	16.7%	0.0%	16.7%	0.0%	0.0%	1.5%	0.0%
Morrions Hunters Tryst	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%	34.0%	1.5%	0.0%	0.0%
Sainsbury Cameron Toll	6.3%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.9%	0.0%	0.0%
Newtongrange	0.0%	7.1%	0.0%	31.3%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Colinton Mains	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	20.8%	0.0%	0.0%	0.0%
Scotmid Hunterfield Gorebridge	0.0%	0.0%	0.0%	0.0%	35.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penicuik Town Centre	0.0%	0.0%	31.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edinb incl Morn'gside & Craigl'th	15.6%	2.4%	4.2%	1.6%	2.5%	1.9%	2.7%	0.0%	0.0%	0.0%	36.8%	42.8%	1.5%	0.0%
Marks & Spencer Straiton	0.0%	2.4%	1.4%	0.0%	0.0%	11.3%	0.0%	0.0%	0.0%	0.0%	0.9%	1.5%	0.0%	0.0%
Musselburgh	3.1%	4.8%	0.0%	0.0%	0.0%	1.9%	1.4%	0.0%	0.0%	0.0%	0.0%	1.5%	71.2%	7.4%
Internet / Delivered	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
Mayfield	0.0%	2.4%	0.0%	34.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Costco Straiton	0.0%	2.4%	0.0%	0.0%	0.0%	3.8%	1.4%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%
Roslin	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	16.7%	40.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Loanhead town centre	0.0%	0.0%	0.0%	0.0%	2.5%	28.3%	0.0%	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Gyle Centre	0.0%	2.4%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	1.5%	1.5%	0.0%
Gorebridge town centre	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%
Marks & Spencer Newcraighall	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	3.8%	2.1%
Danderhall	28.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%
Local Shops	3.1%	7.1%	0.0%	0.0%	7.5%	0.0%	1.4%	33.3%	13.3%	50.0%	0.0%	5.7%	3.0%	86.2%
Other outside Midlothian	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%	0.9%	0.0%	11.4%	1.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 13
Value of Main Food Spend in First Choice Store 2012
using 2012 survey results
2012 prices

Destination / Origin:	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total £m	Overall Total £m
Tesco Hardengreen	2.39	7.00	0.00	10.65	6.00	0.51	14.77	1.04	0.16	1.52	44.04	0.00	2.05	0.00	1.99	4.04	48.08
Sainsbury Straiton	0.00	0.68	4.03	0.71	0.20	4.61	1.17	0.42	1.44	0.25	13.51	4.58	4.28	0.39	0.33	9.59	23.10
Asda Straiton	0.51	0.23	4.51	1.89	1.00	2.43	2.58	0.42	0.64	0.00	14.21	0.96	4.28	0.59	0.33	6.17	20.37
Tesco Eastfield Penicuik	0.00	0.00	13.52	0.00	0.00	0.13	0.00	0.00	0.16	0.00	13.81	0.00	0.00	0.00	0.00	0.00	13.81
Asda Jewel	1.37	2.48	0.00	2.84	0.60	0.13	0.23	0.00	0.00	0.25	7.90	0.00	2.61	8.24	15.25	26.10	34.00
Morrisons Moredun	1.19	1.13	0.00	1.66	0.80	0.38	1.17	0.00	0.16	0.25	6.75	0.00	16.77	0.00	0.00	16.77	23.52
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	1.17	0.00	0.00	0.00	1.17	0.00	0.00	0.00	0.00	0.00	1.17
Dalkeith Town Centre	0.85	2.03	0.00	0.47	0.40	0.00	0.00	0.21	0.00	0.25	4.22	0.00	0.56	0.00	0.00	0.56	4.78
Morrions Hunters Tryst	0.00	0.00	0.24	0.00	0.00	0.13	0.00	0.00	0.32	0.00	0.69	11.08	0.56	0.00	0.00	11.64	12.32
Sainsbury Cameron Toll	0.51	0.23	0.00	0.00	0.20	0.13	0.23	0.00	0.16	0.00	1.46	1.45	11.55	0.39	0.66	14.05	15.51
Newtongrange	0.00	0.00	0.00	0.47	0.00	0.00	0.00	0.00	0.00	0.00	0.47	0.00	0.00	0.00	0.00	0.00	0.47
Tesco Colinton Mains	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.16	0.00	0.40	12.53	0.56	0.00	0.00	13.08	13.48
Scotmid Hunterfield Gorebridge	0.00	0.00	0.00	0.00	0.60	0.00	0.00	0.00	0.00	0.00	0.60	0.00	0.00	0.00	0.00	0.00	0.60
Penicuik Town Centre	0.00	0.00	1.90	0.00	0.00	0.26	0.00	0.00	0.16	0.00	2.31	0.00	0.00	0.00	0.00	0.00	2.31
Other Edinb incl Morn'gside & Craigl'th	0.17	0.90	0.47	0.47	0.20	0.00	0.23	0.00	0.16	0.00	2.62	7.95	5.78	0.98	1.33	16.03	18.65
Marks & Spencer Straiton	0.00	0.23	0.24	0.00	0.00	0.13	0.23	0.00	0.00	0.00	0.83	0.48	0.00	0.00	0.00	0.48	1.31
Musselburgh	0.17	0.00	0.24	0.00	0.20	0.00	0.47	0.00	0.16	0.00	1.24	0.00	0.00	21.38	10.28	31.66	32.89
Internet / Delivered	0.17	0.23	0.24	0.71	0.20	0.00	0.70	0.00	0.00	0.00	2.25	0.96	2.05	0.39	0.99	4.40	6.65
Mayfield	0.00	0.00	0.00	0.71	0.00	0.00	0.00	0.00	0.00	0.00	0.71	0.00	0.00	0.00	0.00	0.00	0.71
Costco Straiton	0.00	0.23	0.00	0.00	0.00	0.13	0.23	0.00	0.00	0.00	0.59	0.00	0.00	0.39	0.00	0.39	0.98
Roslin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.16
Loanhead town centre	0.00	0.23	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.35	0.00	0.00	0.00	0.00	0.00	0.35
Gyle Centre	0.00	0.00	0.00	0.00	0.20	0.00	0.47	0.00	0.16	0.00	0.83	0.24	0.56	0.00	0.00	0.80	1.63
Gorebridge town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Marks & Spencer Newcraighall	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.39	0.66	1.06	1.06
Danderhall	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.17
Local Shops	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other outside Midlothian	0.00	0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00	0.20	0.00	0.00	0.39	9.95	10.34	10.54
Total	**7.51**	**15.57**	**25.38**	**20.83**	**10.80**	**9.09**	**23.68**	**2.08**	**4.01**	**2.54**	**121.48**	**40.23**	**51.61**	**33.54**	**41.78**	**167.15**	**288.63**

Table 14
Value of Supplementary Main Food Spend in Second Choice Store 2012
using 2012 survey results
2012 prices

Destination / Origin:	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian	Outer Catchment Total £m	Overall Total £m
Tesco Hardengreen	0.30	0.78	0.25	1.30	0.83	0.22	1.14	0.25	0.06	0.10	5.24	0.00	1.32	0.00	0.58	1.90	7.14
Sainsbury Straiton	0.00	0.35	1.25	0.46	0.37	0.87	0.68	0.13	0.23	0.10	4.43	1.42	1.79	0.26	0.58	4.05	8.48
Asda Straiton	0.30	0.35	1.75	0.54	0.56	1.14	1.37	0.13	0.34	0.10	6.57	0.47	0.47	0.00	0.00	0.94	7.51
Tesco Eastfield Penicuik	0.00	0.00	1.58	0.00	0.00	0.11	0.00	0.00	0.11	0.00	1.81	0.00	0.00	0.00	0.00	0.00	1.81
Asda Jewel	0.30	0.35	0.08	0.61	0.37	0.00	0.38	0.13	0.00	0.20	2.42	0.12	0.47	3.59	1.87	6.05	8.47
Morrisons Moredun	0.53	0.17	0.25	0.38	0.46	0.05	0.68	0.13	0.06	0.00	2.72	0.12	3.12	0.00	0.00	3.24	5.96
Bonnyrigg Town Centre	0.00	0.09	0.00	0.08	0.00	0.00	0.30	0.13	0.00	0.00	0.59	0.00	0.00	0.00	0.14	0.14	0.74
Dalkeith Town Centre	0.30	0.95	0.00	0.38	0.19	0.00	0.15	0.00	0.00	0.10	2.08	0.00	0.00	0.17	0.00	0.17	2.25
Morrions Hunters Tryst	0.00	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.17	2.37	0.00	0.00	0.00	2.37	2.54
Sainsbury Cameron Toll	0.46	0.17	0.00	0.23	0.09	0.00	0.08	0.00	0.00	0.00	1.03	0.71	2.65	0.17	0.14	3.68	4.70
Newtongrange	0.00	0.09	0.00	0.38	0.19	0.00	0.00	0.00	0.00	0.00	0.66	0.00	0.00	0.00	0.00	0.00	0.66
Tesco Colinton Mains	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.96	0.23	0.00	0.00	3.20	3.20
Scotmid Hunterfield Gorebridge	0.00	0.00	0.00	0.00	0.19	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.00	0.00	0.00	0.00	0.19
Penicuik Town Centre	0.00	0.00	0.92	0.00	0.00	0.05	0.08	0.00	0.06	0.00	1.10	0.00	0.00	0.00	0.00	0.00	1.10
Other Edinb incl Morn'gside & Craigl'th	0.15	0.26	0.08	0.23	0.09	0.00	0.08	0.00	0.06	0.00	0.95	2.25	3.04	1.20	0.29	6.78	7.73
Marks & Spencer Straiton	0.00	0.09	0.08	0.00	0.00	0.22	0.23	0.00	0.06	0.00	0.67	0.83	0.86	0.00	0.00	1.69	2.36
Musselburgh	0.08	0.09	0.00	0.00	0.09	0.05	0.15	0.00	0.06	0.10	0.62	0.12	0.93	5.13	3.60	9.79	10.41
Internet / Delivered	0.00	0.09	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.24	0.00	0.00	0.00	0.00	0.00	0.24
Mayfield	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Costco Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.08	0.12	0.23	0.00	0.00	0.35	0.43
Roslin	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.11
Loanhead town centre	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05
Gyle Centre	0.00	0.00	0.17	0.00	0.09	0.05	0.15	0.00	0.06	0.00	0.52	0.47	0.23	0.00	0.29	1.00	1.52
Gorebridge town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Marks & Spencer Newcraighall	0.00	0.09	0.00	0.08	0.09	0.00	0.08	0.00	0.00	0.00	0.33	0.00	0.00	0.26	0.43	0.69	1.02
Danderhall	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.08
Local Shops	0.00	0.17	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.27	0.00	0.00	0.00	0.00	0.00	0.27
Other outside Midlothian	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	3.46	3.46	3.55
Total	**2.50**	**4.07**	**6.58**	**4.83**	**3.80**	**2.82**	**5.63**	**0.89**	**1.20**	**0.70**	**33.01**	11.98	15.35	10.78	11.38	**49.48**	**82.49**

Table 15
Value of Top-up Spend 2012
using 2012 survey results
2012 prices

Destination / Origin:	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total £m	Overall Total £m
Tesco Hardengreen	0.25	0.40	0.05	0.48	0.44	0.00	1.61	0.04	0.00	0.07	3.34	0.00	0.00	0.00	0.07	0.07	3.41
Sainsbury Straiton	0.00	0.06	0.05	0.06	0.00	0.51	0.06	0.00	0.07	0.00	0.82	0.07	0.47	0.00	0.00	0.55	1.36
Asda Straiton	0.00	0.00	0.11	0.06	0.11	0.44	0.00	0.00	0.14	0.00	0.86	0.07	0.36	0.00	0.00	0.43	1.29
Tesco Eastfield Penicuik	0.00	0.00	2.03	0.00	0.00	0.04	0.00	0.00	0.00	0.00	2.07	0.00	0.18	0.00	0.00	0.18	2.24
Asda Jewel	0.00	0.06	0.05	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.17	0.00	0.00	0.60	0.13	0.74	0.90
Morrisons Moredun	0.00	0.00	0.00	0.06	0.00	0.00	0.13	0.00	0.00	0.00	0.19	0.00	2.49	0.00	0.00	2.49	2.68
Bonnyrigg Town Centre	0.00	0.00	0.00	0.06	0.06	0.00	2.25	0.04	0.07	0.00	2.48	0.00	0.00	0.00	0.00	0.00	2.48
Dalkeith Town Centre	0.62	1.08	0.05	0.48	0.11	0.00	0.26	0.04	0.00	0.04	2.68	0.00	0.00	0.15	0.00	0.15	2.83
Morrions Hunters Tryst	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.07	2.57	0.18	0.00	0.00	2.75	2.82
Sainsbury Cameron Toll	0.12	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.18	0.00	1.36	0.00	0.00	1.36	1.54
Newtongrange	0.00	0.17	0.00	1.19	0.28	0.00	0.00	0.00	0.00	0.00	1.64	0.00	0.00	0.00	0.00	0.00	1.64
Tesco Colinton Mains	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.06	1.57	0.00	0.00	0.00	1.57	1.64
Scotmid Hunterfield Gorebridge	0.00	0.00	0.00	0.00	0.77	0.00	0.00	0.00	0.00	0.00	0.77	0.00	0.00	0.00	0.00	0.00	0.77
Penicuik Town Centre	0.00	0.00	1.21	0.06	0.00	0.00	0.00	0.00	0.00	0.00	1.27	0.00	0.00	0.00	0.00	0.00	1.27
Other Edinb incl Morn'gside & Craigl'th	0.31	0.06	0.16	0.06	0.06	0.04	0.13	0.00	0.00	0.00	0.81	2.78	4.93	0.15	0.00	7.86	8.67
Marks & Spencer Straiton	0.00	0.06	0.05	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.33	0.07	0.18	0.00	0.00	0.25	0.58
Musselburgh	0.06	0.11	0.00	0.00	0.00	0.04	0.06	0.00	0.00	0.00	0.28	0.00	0.18	7.08	0.47	7.72	8.00
Internet / Delivered	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.00	0.04	0.07	0.00	0.00	0.00	0.07	0.11
Mayfield	0.00	0.06	0.00	1.31	0.00	0.00	0.00	0.00	0.00	0.00	1.37	0.00	0.00	0.00	0.00	0.00	1.37
Costco Straiton	0.00	0.06	0.00	0.00	0.00	0.07	0.06	0.00	0.00	0.00	0.19	0.07	0.00	0.00	0.00	0.07	0.27
Roslin	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.04	0.42	0.00	0.52	0.00	0.00	0.00	0.00	0.00	0.52
Loanhead town centre	0.00	0.00	0.00	0.00	0.06	0.55	0.00	0.00	0.07	0.00	0.67	0.00	0.00	0.00	0.00	0.00	0.67
Gyle Centre	0.00	0.06	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.11	0.21	0.18	0.15	0.00	0.54	0.66
Gorebridge town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Marks & Spencer Newcraighall	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.18	0.38	0.13	0.69	0.74
Danderhall	0.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.00	0.18	0.00	0.00	0.18	0.74
Local Shops	0.06	0.17	0.00	0.00	0.17	0.00	0.06	0.08	0.14	0.11	0.80	0.00	0.65	0.30	5.40	6.35	7.15
Other outside Midlothian	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.13	0.07	0.00	1.13	0.07	1.27	1.39
Total	**1.98**	**2.40**	**3.90**	**3.81**	**2.21**	**1.94**	**4.70**	**0.25**	**1.06**	**0.22**	**22.46**	7.57	11.51	9.94	6.26	**35.29**	**57.74**

Table 16
Value of Total Convenience Spend 2012
using 2012 survey results
2012 prices

Origin: / Destination	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Midlothian Total £m	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian	Outer Catchment Total	Trade from Borders	Overall Total £m	% Trade from outside Midlothian
Within Midlothian	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m		£m	£m	£m	£m	£m	£m		
Tesco Hardengreen	2.94	8.18	0.30	12.43	7.28	0.73	17.52	1.33	0.22	1.69	52.62	0.00	3.37	0.00	2.63	6.01	1.31	59.93	13.9%
Dalkeith Town Centre	1.78	4.07	0.05	1.33	0.70	0.00	0.41	0.25	0.00	0.39	8.98	0.00	0.56	0.32	0.00	0.88	0.00	9.86	9.8%
Bonnyrigg Town Centre	0.00	0.09	0.00	0.14	0.06	0.00	3.73	0.17	0.07	0.00	4.25	0.00	0.00	0.00	0.14	0.14	0.00	4.39	3.4%
Penicuik Town Centre	0.00	0.00	4.02	0.06	0.00	0.31	0.08	0.00	0.22	0.00	4.68	0.00	0.00	0.00	0.00	0.00	0.00	4.68	0.0%
Tesco Eastfield Penicuik	0.00	0.00	17.13	0.00	0.00	0.27	0.00	0.00	0.27	0.00	17.68	0.00	0.18	0.00	0.00	0.18	1.42	19.28	9.0%
Sainsbury Straiton	0.00	1.08	5.34	1.23	0.57	5.99	1.92	0.54	1.74	0.35	18.76	6.07	6.55	0.65	0.91	14.18	0.77	33.71	79.7%
Asda Straiton	0.82	0.57	6.37	2.49	1.67	4.01	3.95	0.54	1.12	0.10	21.63	1.51	5.11	0.59	0.33	7.54	0.41	29.59	36.8%
Marks & Spencer Straiton	0.00	0.37	0.38	0.00	0.00	0.56	0.46	0.00	0.06	0.00	1.83	1.38	1.04	0.00	0.00	2.42	0.00	4.25	132.2%
Costco Straiton	0.00	0.28	0.00	0.00	0.00	0.20	0.37	0.00	0.00	0.00	0.86	0.19	0.23	0.39	0.00	0.82	0.00	1.67	95.0%
Loanhead town centre	0.00	0.23	0.00	0.00	0.06	0.73	0.00	0.00	0.07	0.00	1.08	0.00	0.00	0.00	0.00	0.00	0.00	1.08	0.0%
Mayfield	0.00	0.06	0.00	2.02	0.00	0.00	0.00	0.00	0.00	0.00	2.08	0.00	0.00	0.00	0.00	0.00	0.00	2.08	0.0%
Newtongrange	0.00	0.26	0.00	2.05	0.46	0.00	0.00	0.00	0.00	0.00	2.77	0.00	0.00	0.00	0.00	0.00	0.00	2.77	0.0%
Scotmid Hunterfield Gorebridge	0.00	0.00	0.00	0.00	1.56	0.00	0.00	0.00	0.00	0.00	1.56	0.00	0.00	0.00	0.00	0.00	0.00	1.56	0.0%
Gorebridge town centre	0.00	0.00	0.00	0.00	0.26	0.00	0.00	0.00	0.00	0.00	0.26	0.00	0.00	0.00	0.00	0.00	0.00	0.26	0.0%
Roslin	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.04	0.70	0.00	0.79	0.00	0.00	0.00	0.00	0.00	0.00	0.79	0.0%
Danderhall	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.80	0.00	0.18	0.00	0.00	0.18	0.00	0.98	22.2%
Local Shops	0.06	0.34	0.00	0.00	0.00	0.00	0.06	0.08	0.14	0.11	0.80	0.00	0.00	0.00	0.00	0.00	0.00	0.80	0.0%
Total in Midlothian	**6.40**	**15.52**	**33.64**	**21.75**	**12.60**	**12.81**	**28.50**	**2.96**	**4.61**	**2.65**	**141.44**	**9.15**	**17.22**	**1.95**	**4.02**	**32.34**	**3.90**	**177.68**	**25.6%**
Outside Midlothian																			
Asda Jewel	1.67	2.89	0.14	3.45	1.03	0.13	0.61	0.13	0.00	0.45	10.50	0.12	3.08	12.43	17.26	32.89		43.38	
Morrisons Moredun	1.73	1.30	0.25	2.10	1.26	0.44	1.99	0.13	0.22	0.25	9.66	0.12	22.38	0.00	0.00	22.49		32.16	
Morrions Hunters Tryst	0.00	0.00	0.40	0.00	0.00	0.13	0.00	0.00	0.39	0.00	0.92	16.02	0.74	0.00	0.00	16.76		17.68	
Sainsbury Cameron Toll	1.09	0.40	0.00	0.23	0.35	0.13	0.31	0.00	0.16	0.00	2.67	2.16	15.56	0.56	0.81	19.09		21.76	
Tesco Colinton Mains	0.00	0.00	0.00	0.24	0.00	0.00	0.06	0.00	0.16	0.00	0.46	17.06	0.79	0.00	0.00	17.85		18.31	
Gyle Centre	0.00	0.06	0.17	0.00	0.35	0.05	0.62	0.00	0.22	0.00	1.46	0.93	0.97	0.15	0.29	2.34		3.80	
Marks & Spencer Newcraighall	0.00	0.14	0.00	0.08	0.09	0.00	0.08	0.00	0.00	0.00	0.39	0.00	0.18	1.03	1.23	2.43		2.82	
Other Edinburgh	0.63	1.22	0.72	0.76	0.35	0.04	0.44	0.00	0.22	0.00	4.38	12.99	13.74	2.33	1.61	30.67		35.05	
Musselburgh	0.31	0.20	0.24	0.00	0.29	0.09	0.69	0.00	0.22	0.10	2.13	0.12	1.11	33.59	14.35	49.17		51.30	
Internet / Delivered	0.17	0.31	0.24	0.86	0.20	0.04	0.70	0.00	0.00	0.00	2.52	1.03	2.05	0.39	0.99	4.47		6.99	
Other outside Midlothian	0.00	0.00	0.05	0.00	0.29	0.00	0.00	0.00	0.07	0.00	0.42	0.07	0.65	1.82	18.87	21.42		21.83	
Total outside Midlothian	**5.60**	**6.52**	**2.21**	**7.72**	**4.21**	**1.04**	**5.50**	**0.25**	**1.65**	**0.81**	**35.51**	**50.62**	**61.25**	**52.31**	**55.41**	**219.58**		**255.09**	
Overall Total	**11.99**	**22.04**	**35.85**	**29.47**	**16.81**	**13.85**	**34.00**	**3.22**	**6.26**	**3.45**	**176.95**	**59.77**	**78.47**	**54.26**	**59.42**	**251.92**		**428.87**	
Total Leakage from Midlothian (%)	**46.7%**	**29.6%**	**6.2%**	**26.2%**	**25.0%**	**7.5%**	**16.2%**	**7.9%**	**26.4%**	**23.3%**	**20.1%**								

Table 17
Summary of Convenience Expenditure Trade Draw by Area 2012

Destination	Trade Drawn to Midlothian from								Total
	Midlothian		Edinburgh		E Lothian		Scottish Borders		
	£m	%	£m	%	£m	%	£m	%	£m
Tesco Hardengreen	52.62	87.8%	3.37	5.6%	2.63	4.4%	1.31	2.2%	59.93
Dalkeith Town Centre	8.98	91.1%	0.56	5.7%	0.32	3.3%	0.00	0.0%	9.86
Bonnyrigg Town Centre	4.25	96.7%	0.00	0.0%	0.14	3.3%	0.00	0.0%	4.39
Penicuik Town Centre	4.68	100%	0.00	0.0%	0.00	0.0%	0.00	0.0%	4.68
Tesco Eastfield Penicuik	17.68	91.7%	0.18	0.9%	0.00	0.0%	1.42	7.4%	19.28
Straiton	43.09	62.2%	22.08	31.9%	2.87	4.1%	1.18	1.7%	69.22
Loanhead	1.08	100%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.08
Mayfield	2.08	100%	0.00	0.0%	0.00	0.0%	0.00	0.0%	2.08
Newtongrange	2.77	100%	0.00	0.0%	0.00	0.0%	0.00	0.0%	2.77
Hunterfield	1.56	100%	0.00	0.0%	0.00	0.0%	0.00	0.0%	1.56
Gorebridge	0.26	100%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.26
Roslin	0.79	100%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.79
Danderhall	0.80	81.9%	0.18	18.1%	0.00	0.0%	0.00	0.0%	0.98
Local Shops	0.80	100%	0.00	0.0%	0.00	0.0%	0.00	0.0%	0.80
Total	141.44	79.6%	26.37	14.8%	5.97	3.4%	3.90	2.2%	177.68

Table 18
Midlothian Convenience Expenditure drawn from Sub-Areas 2012

Destination	Trade Drawn from						Total
	A7 / A68 corridor		A701 corridor		Shawfair area		
	£m	%	£m	%	£m	%	£m
Tesco Hardengreen	48.43	92.0%	1.25	2.4%	2.94	5.6%	52.62
Dalkeith Town Centre	7.14	79.6%	0.05	0.6%	1.78	19.8%	8.98
Bonnyrigg Town Centre	4.17	98.3%	0.07	1.7%	0.00	0.0%	4.25
Penicuik Town Centre	0.14	2.9%	4.55	97.1%	0.00	0.0%	4.68
Tesco Eastfield Penicuik	0.00	0.0%	17.68	100.0%	0.00	0.0%	17.68
Straiton	16.50	38.3%	25.77	59.8%	0.82	1.9%	43.09
Loanhead	0.28	26.0%	0.80	74.0%	0.00	0.0%	1.08
Mayfield	2.08	100.0%	0.00	0.0%	0.00	0.0%	2.08
Newtongrange	2.77	100.0%	0.00	0.0%	0.00	0.0%	2.77
Hunterfield	1.56	100.0%	0.00	0.0%	0.00	0.0%	1.56
Gorebridge	0.26	100.0%	0.00	0.0%	0.00	0.0%	0.26
Roslin	0.04	5.2%	0.75	94.8%	0.00	0.0%	0.79
Danderhall	0.00	0.0%	0.00	0.0%	0.80	100.0%	0.80
Local Shops	0.60	74.8%	0.14	17.5%	0.06	7.7%	0.80
Total	83.97	59.4%	51.07	36.1%	6.40	4.5%	141.44

Table 19
Trade Draw of Shopping Destinations by Area, 2012
from 2012 Survey Results

Destination / Origin:	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Total
Within Midlothian	%	%	%	%	%	%	%	%	%	%	
Tesco Hardengreen	5.6%	15.5%	0.6%	23.6%	13.8%	1.4%	33.3%	2.5%	0.4%	3.2%	100%
Dalkeith Town Centre	19.8%	45.3%	0.6%	14.8%	7.8%	0.0%	4.6%	2.8%	0.0%	4.3%	100%
Bonnyrigg Town Centre	0.0%	2.0%	0.0%	3.2%	1.3%	0.0%	87.8%	4.0%	1.7%	0.0%	100%
Penicuik Town Centre	0.0%	0.0%	85.8%	1.3%	0.0%	6.6%	1.6%	0.0%	4.6%	0.0%	100%
Tesco Eastfield Penicuik	0.0%	0.0%	96.9%	0.0%	0.0%	1.5%	0.0%	0.0%	1.6%	0.0%	100%
Sainsbury Straiton	0.0%	5.8%	28.4%	6.6%	3.0%	31.9%	10.2%	2.9%	9.3%	1.9%	100%
Asda Straiton	3.8%	2.6%	29.4%	11.5%	7.7%	18.5%	18.2%	2.5%	5.2%	0.5%	100%
Marks & Spencer Straiton	0.0%	20.2%	20.5%	0.0%	0.0%	30.9%	25.3%	0.0%	3.1%	0.0%	100%
Costco Straiton	0.0%	32.9%	0.0%	0.0%	0.0%	23.4%	43.6%	0.0%	0.0%	0.0%	100%
Loanhead town centre	0.0%	20.9%	0.0%	0.0%	5.1%	67.5%	0.0%	0.0%	6.5%	0.0%	100%
Mayfield	0.0%	2.7%	0.0%	97.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100%
Newtongrange	0.0%	9.3%	0.0%	74.0%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%	100%
Scotmid Hunterfield Gorebridge	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100%
Gorebridge town centre	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100%
Roslin	0.0%	0.0%	6.9%	0.0%	0.0%	0.0%	0.0%	5.2%	87.8%	0.0%	100%
Danderhall	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100%
Local Shops	7.7%	42.8%	0.0%	0.0%	0.0%	0.0%	8.0%	10.3%	17.5%	13.7%	100%
Outside Midlothian											
Asda Jewel	15.9%	27.5%	1.3%	32.9%	9.8%	1.2%	5.9%	1.2%	0.0%	4.3%	100%
Morrisons Moredun	17.9%	13.5%	2.6%	21.7%	13.1%	4.5%	20.5%	1.3%	2.2%	2.6%	100%
Morrions Hunters Tryst	0.0%	0.0%	43.8%	0.0%	0.0%	13.9%	0.0%	0.0%	42.4%	0.0%	100%
Sainsbury Cameron Toll	40.9%	15.0%	0.0%	8.6%	13.0%	4.8%	11.6%	0.0%	6.0%	0.0%	100%
Tesco Colinton Mains	0.0%	0.0%	0.0%	51.3%	0.0%	0.0%	13.9%	0.0%	34.7%	0.0%	100%
Gyle Centre	0.0%	3.9%	11.4%	0.0%	23.8%	3.7%	42.4%	0.0%	14.8%	0.0%	100%
Marks & Spencer Newcraighall	0.0%	36.9%	0.0%	19.7%	23.8%	0.0%	19.6%	0.0%	0.0%	0.0%	100%
Other Edinburgh	14.4%	27.9%	16.5%	17.4%	7.9%	0.8%	10.0%	0.0%	5.0%	0.0%	100%
Musselburgh	14.5%	9.4%	11.1%	0.0%	13.7%	4.3%	32.1%	0.0%	10.2%	4.7%	100%
Internet / Delivered	6.8%	12.4%	9.4%	34.2%	7.9%	1.4%	27.9%	0.0%	0.0%	0.0%	100%
Other outside Midlothian	0.0%	0.0%	13.1%	0.0%	70.0%	0.0%	0.0%	0.0%	16.9%	0.0%	100%

Table 20
Market Share of Shopping Destinations by Area, 2012
from 2012 Survey Results

Origin: Destination	Danderhall	Dalkeith Town	Penicuik	Mayfield / Newtongrange	Gorebridge	Loanhead / Damhead	Bonnyrigg / Lasswade	Rosewell	Roslin	Pathhead / Fala	Total
Within Midlothian	%	%	%	%	%	%	%	%	%	%	
Tesco Hardengreen	24.5%	37.1%	0.9%	42.2%	43.3%	5.3%	51.5%	41.5%	3.5%	49.1%	29.7%
Dalkeith Town Centre	14.8%	18.5%	0.2%	4.5%	4.1%	0.0%	1.2%	7.7%	0.0%	11.3%	5.1%
Bonnyrigg Town Centre	0.0%	0.4%	0.0%	0.5%	0.3%	0.0%	11.0%	5.2%	1.1%	0.0%	2.4%
Penicuik Town Centre	0.0%	0.0%	11.2%	0.2%	0.0%	2.2%	0.2%	0.0%	3.5%	0.0%	2.6%
Tesco Eastfield Penicuik	0.0%	0.0%	47.8%	0.0%	0.0%	2.0%	0.0%	0.0%	4.4%	0.0%	10.0%
Sainsbury Straiton	0.0%	4.9%	14.9%	4.2%	3.4%	43.2%	5.6%	16.9%	27.8%	10.2%	10.6%
Asda Straiton	6.8%	2.6%	17.8%	8.4%	9.9%	29.0%	11.6%	16.9%	18.0%	2.9%	12.2%
Marks & Spencer Straiton	0.0%	1.7%	1.0%	0.0%	0.0%	4.1%	1.4%	0.0%	0.9%	0.0%	1.0%
Costco Straiton	0.0%	1.3%	0.0%	0.0%	0.0%	1.5%	1.1%	0.0%	0.0%	0.0%	0.5%
Loanhead town centre	0.0%	1.0%	0.0%	0.0%	0.3%	5.3%	0.0%	0.0%	1.1%	0.0%	0.6%
Mayfield	0.0%	0.3%	0.0%	6.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Newtongrange	0.0%	1.2%	0.0%	6.9%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%
Scotmid Hunterfield Gorebridge	0.0%	0.0%	0.0%	0.0%	9.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Gorebridge town centre	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Roslin	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	1.3%	11.1%	0.0%	0.4%
Danderhall	6.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Local Shops	0.5%	1.6%	0.0%	0.0%	0.0%	0.0%	0.2%	2.6%	2.2%	3.2%	0.5%
Expenditure Retained	**53.3%**	**70.4%**	**93.8%**	**73.8%**	**75.0%**	**92.5%**	**83.8%**	**92.1%**	**73.6%**	**76.7%**	**79.9%**
Outside Midlothian											
Asda Jewel	13.9%	13.1%	0.4%	11.7%	6.1%	0.9%	1.8%	4.0%	0.0%	13.1%	5.9%
Morrisons Moredun	14.4%	5.9%	0.7%	7.1%	7.5%	3.2%	5.8%	4.0%	3.5%	7.3%	5.5%
Morrions Hunters Tryst	0.0%	0.0%	1.1%	0.0%	0.0%	0.9%	0.0%	0.0%	6.2%	0.0%	0.5%
Sainsbury Cameron Toll	9.1%	1.8%	0.0%	0.8%	2.1%	0.9%	0.9%	0.0%	2.6%	0.0%	1.5%
Tesco Colinton Mains	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.2%	0.0%	2.6%	0.0%	0.3%
Gyle Centre	0.0%	0.3%	0.5%	0.0%	2.1%	0.4%	1.8%	0.0%	3.5%	0.0%	0.8%
Marks & Spencer Newcraighall	0.0%	0.7%	0.0%	0.3%	0.6%	0.0%	0.2%	0.0%	0.0%	0.0%	0.2%
Other Edinburgh	5.3%	5.5%	2.0%	2.6%	2.1%	0.3%	1.3%	0.0%	3.5%	0.0%	2.5%
Musselburgh	2.6%	0.9%	0.7%	0.0%	1.7%	0.7%	2.0%	0.0%	3.5%	2.9%	1.2%
Internet / Delivered	1.4%	1.4%	0.7%	2.9%	1.2%	0.3%	2.1%	0.0%	0.0%	0.0%	1.4%
Other outside Midlothian	0.0%	0.0%	0.2%	0.0%	1.7%	0.0%	0.0%	0.0%	1.1%	0.0%	0.2%
Expenditure Lost	**46.7%**	**29.6%**	**6.2%**	**26.2%**	**25.0%**	**7.5%**	**16.2%**	**7.9%**	**26.4%**	**23.3%**	**20.1%**
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 21
Comparison Spending in Midlothian in 2012
Clothes and Shoes
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Midlothian Total £m	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian	Outer Catchment Total	Overall Total £m
Within Midlothian	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m		£m	£m	£m	£m		
Dalkeith Town Centre	0.30	0.37	0.00	0.67	0.26	0.07	0.39	0.00	0.00	0.14	2.20	0.00	0.32	0.00	0.00	0.32	2.53
Tesco Hardengreen	0.20	0.12	0.13	0.40	0.13	0.00	0.91	0.00	0.00	0.00	1.89	0.00	0.00	0.00	0.00	0.00	1.89
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gorebridge Town Centre	0.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.10
Loanhead Town Centre	0.10	0.00	0.13	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.30	0.14	0.00	0.00	0.00	0.14	0.44
Newtongrange Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pentland Retail Park	0.30	0.37	2.15	0.40	0.52	0.89	1.17	0.13	0.28	0.00	6.21	1.71	1.84	0.24	0.36	4.15	10.36
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.18	0.18	0.18
Asda Straiton	0.00	0.00	1.01	0.27	0.26	0.30	0.65	0.00	0.09	0.00	2.58	0.28	0.00	0.24	0.00	0.53	3.10
IKEA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Costco	0.00	0.00	0.00	0.00	0.00	0.07	0.13	0.00	0.00	0.00	0.20	0.14	0.00	0.00	0.00	0.14	0.35
Penicuik Town Centre	0.00	0.00	0.51	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.64	0.00	0.00	0.00	0.00	0.00	0.64
Tesco Eastfield Penicuik	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.00	0.00	0.13
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**1.01**	**0.87**	**4.05**	**1.86**	**1.17**	**1.41**	**3.25**	**0.13**	**0.37**	**0.14**	**14.26**	**2.28**	**2.16**	**0.48**	**0.54**	**5.47**	**19.72**
Outside Midlothian:																	
Edinburgh City Centre	0.91	2.47	3.92	1.60	1.30	1.41	3.38	0.26	0.65	0.28	16.18	8.26	7.90	2.88	4.87	23.92	40.10
Asda Jewel	0.20	0.25	0.00	0.67	0.13	0.00	0.13	0.00	0.00	0.00	1.37	0.00	0.32	1.20	1.08	2.61	3.98
Newcraighall (Fort Kinnaird etc)	0.81	2.60	0.51	4.66	1.95	0.45	3.25	0.26	0.19	0.71	15.37	1.42	4.87	11.18	11.55	29.02	44.39
Cameron Toll	0.30	0.37	0.13	0.40	0.26	0.37	0.39	0.13	0.09	0.14	2.59	0.57	5.19	0.24	0.18	6.19	8.77
Gyle Centre	0.20	0.62	2.40	0.00	0.39	0.67	0.91	0.13	0.28	0.00	5.60	6.84	4.87	0.60	0.54	12.85	18.45
Ocean Terminal	0.20	0.00	0.00	0.40	0.00	0.15	0.00	0.13	0.09	0.00	0.97	0.00	0.32	0.96	0.36	1.65	2.62
Other in Edinburgh	0.20	0.12	0.38	0.27	0.13	0.15	0.26	0.00	0.09	0.00	1.60	0.71	0.00	0.24	0.54	1.49	3.10
Livingston	0.10	0.25	0.25	0.27	0.26	0.22	0.39	0.13	0.28	0.00	2.15	0.85	1.19	0.00	0.36	2.41	4.56
Musselburgh	0.10	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.00	0.00	1.44	0.36	1.80	2.03
Other East Lothian	0.10	0.00	0.13	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.30	0.00	0.00	0.00	0.18	0.18	0.48
Glasgow	0.00	0.00	0.13	0.00	0.00	0.00	0.13	0.00	0.00	0.00	0.26	0.14	0.32	0.00	0.00	0.47	0.72
Peebles	0.00	0.00	0.25	0.00	0.00	0.07	0.13	0.00	0.09	0.00	0.55	0.00	0.00	0.00	0.00	0.00	0.55
Elsewhere in Scotland	0.00	0.25	0.13	0.00	0.26	0.00	0.13	0.00	0.00	0.00	0.76	0.14	0.65	0.24	0.00	1.03	1.80
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.30	0.25	1.01	0.80	0.39	0.15	0.26	0.00	0.19	0.00	3.34	1.28	1.73	0.96	1.80	5.78	9.12
Total	**4.44**	**8.16**	**13.28**	**10.91**	**6.23**	**5.13**	**12.59**	**1.19**	**2.32**	**1.28**	**65.53**	**22.51**	**29.55**	**20.43**	**22.37**	**94.86**	**160.39**

Table 22
Comparison Spending in Midlothian in 2012
Sportswear / Sports Equipment
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total	Overall Total £m
Within Midlothian																	
Dalkeith Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.12	0.00	0.00	0.12	0.12
Tesco Hardengreen	0.05	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.09
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.05	0.05
Loanhead Town Centre	0.05	0.00	0.05	0.05	0.00	0.03	0.31	0.00	0.00	0.00	0.48	0.05	0.00	0.00	0.00	0.05	0.53
Newtongrange Town Centre	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05
Pentland Retail Park	0.10	0.29	1.63	0.46	0.28	0.66	1.00	0.10	0.19	0.00	4.71	1.25	1.45	0.12	0.13	2.95	7.67
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Asda Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IKEA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Costco	0.00	0.00	0.05	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.08
Penicuik Town Centre	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05
Tesco Eastfield Penicuik	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.25**	**0.29**	**1.78**	**0.51**	**0.28**	**0.72**	**1.35**	**0.10**	**0.19**	**0.00**	**5.47**	**1.35**	**1.56**	**0.12**	**0.13**	**3.17**	**8.64**
Outside Midlothian:																	
Edinburgh City Centre	0.00	0.35	0.35	0.15	0.14	0.11	0.17	0.05	0.08	0.00	1.40	1.30	0.90	0.29	0.87	3.35	4.76
Asda Jewel	0.00	0.06	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.11	0.05	0.31	0.00	0.00	0.36	0.47
Newcraighall (Fort Kinnaird etc)	0.55	0.70	0.15	1.07	0.65	0.06	0.65	0.05	0.12	0.26	4.25	0.10	1.76	3.05	2.80	7.71	11.96
Cameron Toll	0.00	0.06	0.00	0.00	0.05	0.06	0.00	0.00	0.00	0.00	0.16	0.05	0.12	0.00	0.00	0.17	0.33
Gyle Centre	0.00	0.06	0.05	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.15	0.35	0.12	0.00	0.07	0.53	0.68
Ocean Terminal	0.00	0.00	0.05	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.08	0.00	0.08	0.16
Other in Edinburgh	0.05	0.00	0.05	0.05	0.05	0.00	0.04	0.00	0.00	0.00	0.24	0.85	0.23	0.08	0.13	1.30	1.54
Livingston	0.00	0.06	0.05	0.05	0.00	0.00	0.04	0.00	0.00	0.00	0.20	0.05	0.23	0.00	0.13	0.42	0.62
Musselburgh	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.16	0.07	0.23	0.23
Other East Lothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.07	0.07
Glasgow	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.05	0.00	0.00	0.00	0.05	0.10
Peebles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Elsewhere in Scotland	0.00	0.00	0.05	0.15	0.00	0.03	0.09	0.00	0.00	0.00	0.32	0.05	0.12	0.00	0.00	0.17	0.49
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.05	0.06	0.10	0.15	0.09	0.03	0.17	0.05	0.04	0.00	0.74	0.30	0.55	0.29	0.20	1.34	2.08
Total	**0.89**	**1.64**	**2.67**	**2.19**	**1.25**	**1.03**	**2.53**	**0.24**	**0.47**	**0.26**	**13.17**	**4.50**	**5.90**	**4.08**	**4.47**	**18.95**	**32.13**

Table 23
Comparison Spending
CDs / DVDs
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Midlothian Total £m	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian	Outer Catchment Total	Overall Total £m
Within Midlothian	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m		£m	£m	£m	£m		
Dalkeith Town Centre	0.02	0.05	0.00	0.05	0.00	0.00	0.02	0.00	0.00	0.00	0.15	0.00	0.06	0.00	0.00	0.06	0.21
Tesco Hardengreen	0.02	0.13	0.02	0.25	0.16	0.04	0.27	0.05	0.00	0.03	0.99	0.00	0.00	0.00	0.03	0.03	1.01
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loanhead Town Centre	0.00	0.00	0.02	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.04	0.03	0.00	0.00	0.00	0.03	0.07
Newtongrange Town Centre	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02
Pentland Retail Park	0.00	0.00	0.07	0.00	0.00	0.12	0.05	0.00	0.04	0.00	0.28	0.11	0.15	0.03	0.00	0.30	0.58
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.06	0.06
Asda Straiton	0.00	0.00	0.10	0.00	0.05	0.04	0.02	0.00	0.02	0.00	0.23	0.06	0.00	0.00	0.00	0.06	0.28
IKEA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Costco	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Penicuik Town Centre	0.00	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.14
Tesco Eastfield Penicuik	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.15
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.05**	**0.18**	**0.49**	**0.30**	**0.23**	**0.22**	**0.37**	**0.05**	**0.07**	**0.03**	**1.99**	**0.20**	**0.26**	**0.03**	**0.03**	**0.52**	**2.51**
Outside Midlothian:																	
Edinburgh City Centre	0.05	0.10	0.22	0.20	0.05	0.03	0.17	0.03	0.04	0.00	0.88	0.59	0.53	0.14	0.19	1.45	2.33
Asda Jewel	0.10	0.03	0.00	0.10	0.02	0.00	0.00	0.00	0.00	0.00	0.25	0.03	0.21	0.38	0.30	0.91	1.16
Newcraighall (Fort Kinnaird etc)	0.07	0.10	0.05	0.25	0.14	0.05	0.20	0.03	0.05	0.06	1.00	0.11	0.43	0.75	0.88	2.18	3.18
Cameron Toll	0.00	0.00	0.02	0.05	0.02	0.01	0.00	0.00	0.00	0.00	0.11	0.00	0.43	0.00	0.06	0.49	0.60
Gyle Centre	0.02	0.03	0.12	0.00	0.00	0.01	0.05	0.00	0.02	0.00	0.25	0.28	0.06	0.00	0.03	0.37	0.62
Ocean Terminal	0.00	0.03	0.00	0.05	0.02	0.01	0.02	0.00	0.00	0.00	0.14	0.00	0.00	0.09	0.00	0.09	0.22
Other in Edinburgh	0.02	0.00	0.00	0.02	0.05	0.00	0.00	0.00	0.00	0.00	0.10	0.17	0.32	0.03	0.03	0.55	0.65
																0.00	0.00
Livingston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.06	0.06
Musselburgh	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.32	0.14	0.46	0.49
Other East Lothian	0.00	0.00	0.02	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.06	0.06	0.09
Glasgow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Peebles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Elsewhere in Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.06	0.06
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.20	0.45	0.61	0.30	0.19	0.24	0.64	0.03	0.09	0.06	2.79	1.19	1.02	0.60	0.85	3.66	6.45
Total	**0.51**	**0.94**	**1.53**	**1.26**	**0.72**	**0.59**	**1.45**	**0.14**	**0.27**	**0.15**	**7.57**	**2.58**	**3.38**	**2.34**	**2.56**	**10.86**	**18.43**

Table 24
Comparison Spending in Midlothian in 2012
Audio Visual Equipment
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total	Overall Total £m
Within Midlothian																	
Dalkeith Town Centre	0.04	0.11	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.22
Tesco Hardengreen	0.13	0.22	0.12	0.25	0.27	0.03	0.17	0.06	0.00	0.00	1.24	0.00	0.14	0.10	0.00	0.24	1.48
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loanhead Town Centre	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Newtongrange Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pentland Retail Park	0.13	0.06	1.50	0.18	0.27	0.75	0.93	0.17	0.34	0.00	4.31	1.34	1.63	0.10	0.08	3.15	7.47
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.06
Asda Straiton	0.00	0.00	0.12	0.00	0.00	0.03	0.06	0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00	0.20
IKEA	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.06
Costco	0.00	0.17	0.06	0.18	0.07	0.22	0.35	0.00	0.05	0.00	1.09	0.06	0.14	0.15	0.08	0.43	1.52
Penicuik Town Centre	0.00	0.00	0.46	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.46	0.00	0.00	0.00	0.00	0.00	0.46
Tesco Eastfield Penicuik	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.06
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.31**	**0.61**	**2.30**	**0.68**	**0.60**	**1.06**	**1.56**	**0.22**	**0.38**	**0.00**	**7.73**	**1.41**	**1.92**	**0.35**	**0.15**	**3.83**	**11.55**
Outside Midlothian:																	
Edinburgh City Centre	0.27	0.44	1.15	0.37	0.33	0.25	0.69	0.00	0.10	0.11	3.71	3.13	3.12	0.74	1.38	8.37	12.08
Asda Jewel	0.13	0.06	0.00	0.06	0.00	0.03	0.06	0.00	0.00	0.05	0.39	0.00	0.29	0.39	0.31	0.99	1.38
Newcraighall (Fort Kinnaird etc)	0.63	1.16	0.52	2.09	0.93	0.22	1.56	0.11	0.19	0.21	7.62	0.32	3.12	4.63	4.28	12.36	19.98
Cameron Toll	0.04	0.00	0.00	0.06	0.07	0.00	0.00	0.00	0.00	0.05	0.23	0.26	0.38	0.00	0.00	0.64	0.87
Gyle Centre	0.00	0.06	0.12	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.20	0.38	0.14	0.10	0.00	0.63	0.83
Ocean Terminal	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.08	0.08
Other in Edinburgh	0.00	0.11	0.12	0.12	0.13	0.09	0.06	0.00	0.05	0.00	0.68	1.28	0.43	0.00	0.00	1.71	2.39
Livingston	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.05	0.00	0.11	0.06	0.14	0.00	0.00	0.21	0.32
Musselburgh	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.64	0.23	0.87	0.87
Other East Lothian	0.00	0.06	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.61	0.61	0.72
Glasgow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.08	0.08
Peebles	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.06
Elsewhere in Scotland	0.00	0.00	0.00	0.06	0.07	0.00	0.00	0.06	0.05	0.00	0.23	0.00	0.14	0.00	0.08	0.22	0.45
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.27	0.55	0.69	0.55	0.20	0.22	0.69	0.06	0.05	0.05	3.33	1.47	1.20	0.69	1.07	4.43	7.77
Total	**1.65**	**3.04**	**4.95**	**4.07**	**2.32**	**1.91**	**4.69**	**0.44**	**0.86**	**0.48**	**24.41**	**8.31**	**10.91**	**7.54**	**8.26**	**35.01**	**59.42**

Table 25
Comparison Spending in Midlothian in 2012
Portable Domestic Appliances
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total	Overall Total £m
Within Midlothian																	
Dalkeith Town Centre	0.02	0.02	0.00	0.01	0.00	0.00	0.03	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.09
Tesco Hardengreen	0.03	0.10	0.01	0.16	0.08	0.01	0.15	0.03	0.00	0.01	0.58	0.00	0.05	0.02	0.02	0.09	0.67
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loanhead Town Centre	0.00	0.00	0.01	0.01	0.00	0.00	0.01	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Newtongrange Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pentland Retail Park	0.02	0.01	0.29	0.06	0.07	0.20	0.20	0.01	0.09	0.01	0.96	0.45	0.51	0.00	0.02	0.98	1.94
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Asda Straiton	0.00	0.01	0.07	0.03	0.01	0.04	0.01	0.00	0.01	0.00	0.18	0.06	0.10	0.00	0.00	0.16	0.34
IKEA	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.01
Costco	0.00	0.03	0.03	0.02	0.01	0.01	0.02	0.00	0.00	0.00	0.13	0.03	0.03	0.02	0.02	0.09	0.22
Penicuik Town Centre	0.00	0.00	0.16	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.17	0.00	0.00	0.00	0.00	0.00	0.17
Tesco Eastfield Penicuik	0.00	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.08
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.06**	**0.17**	**0.66**	**0.30**	**0.18**	**0.26**	**0.43**	**0.04**	**0.11**	**0.03**	**2.24**	**0.54**	**0.69**	**0.04**	**0.05**	**1.31**	**3.55**
Outside Midlothian:																	
Edinburgh City Centre	0.05	0.10	0.14	0.07	0.03	0.05	0.07	0.00	0.02	0.01	0.54	0.54	0.46	0.08	0.20	1.28	1.82
Asda Jewel	0.03	0.03	0.00	0.03	0.01	0.01	0.02	0.00	0.00	0.00	0.13	0.00	0.05	0.16	0.12	0.33	0.46
Newcraighall (Fort Kinnaird etc)	0.13	0.21	0.07	0.25	0.14	0.03	0.25	0.03	0.01	0.05	1.17	0.11	0.49	0.92	0.74	2.26	3.43
Cameron Toll	0.03	0.00	0.01	0.02	0.01	0.00	0.00	0.00	0.00	0.00	0.07	0.03	0.22	0.00	0.00	0.24	0.31
Gyle Centre	0.00	0.01	0.01	0.00	0.00	0.00	0.01	0.00	0.01	0.00	0.04	0.05	0.00	0.00	0.00	0.05	0.09
Ocean Terminal	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.02	0.02	0.03
Other in Edinburgh	0.00	0.01	0.01	0.01	0.01	0.00	0.01	0.00	0.00	0.00	0.06	0.18	0.10	0.00	0.02	0.29	0.34
Livingston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.02	0.02
Musselburgh	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.02	0.00	0.03	0.17	0.18	0.37	0.40
Other East Lothian	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.20	0.20	0.21
Glasgow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Peebles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Elsewhere in Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.03	0.05	0.08	0.10	0.07	0.03	0.09	0.01	0.02	0.00	0.49	0.19	0.12	0.11	0.11	0.52	1.01
Total	**0.33**	**0.60**	**0.97**	**0.80**	**0.46**	**0.38**	**0.92**	**0.09**	**0.17**	**0.09**	**4.79**	**1.63**	**2.14**	**1.48**	**1.62**	**6.88**	**11.67**

Table 26
Comparison Spending in Midlothian in 2012
Non-Portable Domestic Appliances
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total	Overall Total £m
Within Midlothian																	
Dalkeith Town Centre	0.01	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02
Tesco Hardengreen	0.00	0.01	0.01	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loanhead Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Newtongrange Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pentland Retail Park	0.01	0.02	0.22	0.07	0.06	0.12	0.12	0.01	0.05	0.01	0.69	0.17	0.31	0.00	0.01	0.48	1.17
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Asda Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.01
IKEA	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.01
Costco	0.00	0.01	0.01	0.02	0.01	0.00	0.03	0.00	0.01	0.00	0.08	0.00	0.05	0.00	0.00	0.05	0.13
Penicuik Town Centre	0.00	0.00	0.03	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.04	0.01	0.00	0.00	0.00	0.01	0.05
Tesco Eastfield Penicuik	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.03**	**0.05**	**0.26**	**0.08**	**0.08**	**0.14**	**0.16**	**0.01**	**0.06**	**0.01**	**0.88**	**0.17**	**0.36**	**0.00**	**0.01**	**0.54**	**1.42**
Outside Midlothian:																	
Edinburgh City Centre	0.02	0.06	0.14	0.04	0.02	0.05	0.06	0.01	0.01	0.01	0.43	0.42	0.31	0.06	0.09	0.87	1.30
Asda Jewel	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.01	0.00	0.03	0.04
Newcraighall (Fort Kinnaird etc)	0.13	0.21	0.09	0.33	0.12	0.03	0.27	0.02	0.02	0.03	1.26	0.12	0.49	0.73	0.66	2.00	3.26
Cameron Toll	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.01
Gyle Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.01	0.04	0.00	0.00	0.00	0.04	0.05
Ocean Terminal	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.01
Other in Edinburgh	0.00	0.00	0.01	0.01	0.02	0.01	0.02	0.00	0.00	0.00	0.06	0.11	0.00	0.00	0.01	0.12	0.18
Livingston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Musselburgh	0.01	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.03	0.02	0.05	0.07
Other East Lothian	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.14	0.14	0.14
Glasgow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.01	0.01
Peebles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Elsewhere in Scotland	0.00	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.00	0.01	0.01	0.00	0.00	0.02	0.03	0.04
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.03	0.07	0.14	0.05	0.05	0.03	0.08	0.01	0.02	0.01	0.50	0.20	0.24	0.14	0.13	0.71	1.21
Total	**0.22**	**0.40**	**0.65**	**0.53**	**0.30**	**0.25**	**0.61**	**0.06**	**0.11**	**0.06**	**3.19**	**1.08**	**1.42**	**0.98**	**1.07**	**4.54**	**7.73**

Table 27
Comparison Spending in Midlothian in 2012
Beds Furniture Carpets Floorcoverings
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total	Overall Total £m
Within Midlothian																	
Dalkeith Town Centre	0.05	0.22	0.06	0.22	0.06	0.00	0.13	0.00	0.00	0.00	0.74	0.00	0.00	0.00	0.26	0.26	1.00
Tesco Hardengreen	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bonnyrigg Town Centre	0.00	0.00	0.00	0.07	0.06	0.00	0.13	0.00	0.00	0.00	0.27	0.00	0.00	0.00	0.00	0.00	0.27
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.05	0.07	0.00	0.00	0.00	0.07	0.12
Loanhead Town Centre	0.05	0.00	0.06	0.00	0.00	0.03	0.07	0.00	0.00	0.00	0.21	0.00	0.00	0.00	0.00	0.00	0.21
Newtongrange Town Centre	0.00	0.14	0.06	0.14	0.06	0.00	0.07	0.00	0.05	0.00	0.53	0.00	0.00	0.00	0.00	0.00	0.53
Pentland Retail Park	0.39	0.93	2.06	1.22	0.62	0.82	1.95	0.22	0.24	0.07	8.53	2.04	2.99	0.66	0.68	6.38	14.91
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Asda Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IKEA	0.10	0.07	0.26	0.14	0.12	0.16	0.40	0.05	0.05	0.07	1.43	0.42	1.34	0.44	0.68	2.88	4.31
Costco	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Penicuik Town Centre	0.00	0.00	0.52	0.00	0.00	0.03	0.07	0.00	0.00	0.00	0.62	0.00	0.00	0.00	0.00	0.00	0.62
Tesco Eastfield Penicuik	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.58**	**1.36**	**3.03**	**1.80**	**0.93**	**1.07**	**2.83**	**0.27**	**0.38**	**0.13**	**12.40**	**2.54**	**4.33**	**1.10**	**1.63**	**9.59**	**21.99**
Outside Midlothian:																	
Edinburgh City Centre	0.14	0.57	0.90	0.36	0.25	0.38	0.27	0.05	0.10	0.13	3.16	3.17	1.98	0.99	2.05	8.19	11.36
Asda Jewel	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.16	0.11	0.09	0.36	0.43
Newcraighall (Fort Kinnaird etc)	0.39	0.57	0.26	1.15	0.56	0.09	0.74	0.05	0.14	0.13	4.10	0.49	0.75	2.31	2.48	6.03	10.13
Cameron Toll	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.16	0.00	0.00	0.16	0.23
Gyle Centre	0.00	0.00	0.06	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.13	0.28	0.16	0.11	0.00	0.55	0.68
Ocean Terminal	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.05	0.00	0.11	0.00	0.00	0.27	0.00	0.27	0.39
Other in Edinburgh	0.34	0.07	0.19	0.22	0.19	0.09	0.27	0.00	0.05	0.00	1.42	1.41	1.66	1.43	0.43	4.92	6.34
Livingston	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.05	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.12
Musselburgh	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.38	0.17	0.56	0.59
Other East Lothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.60	0.60	0.60
Glasgow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.09	0.09
Peebles	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.06
Elsewhere in Scotland	0.00	0.07	0.00	0.07	0.06	0.03	0.07	0.00	0.00	0.00	0.30	0.14	0.32	0.11	0.17	0.74	1.05
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.19	0.22	0.39	0.36	0.31	0.13	0.40	0.05	0.10	0.07	2.21	0.14	1.23	0.60	0.43	2.40	4.62
Total	**1.64**	**3.01**	**4.90**	**4.03**	**2.30**	**1.89**	**4.65**	**0.44**	**0.86**	**0.47**	**24.20**	**8.18**	**10.74**	**7.42**	**8.13**	**34.47**	**58.67**

Table 28
Comparison Spending in Midlothian in 2012
Household Textiles / Soft Furnishings

2012 prices

from 2012 Household Survey

Destination	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Midlothian Total £m	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian	Outer Catchment Total	Overall Total £m
Within Midlothian	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m		£m	£m	£m	£m		
Dalkeith Town Centre	0.02	0.05	0.00	0.09	0.00	0.01	0.04	0.00	0.00	0.00	0.22	0.00	0.00	0.00	0.00	0.00	0.22
Tesco Hardengreen	0.02	0.02	0.00	0.02	0.02	0.00	0.04	0.00	0.00	0.00	0.13	0.00	0.05	0.00	0.00	0.05	0.19
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loanhead Town Centre	0.00	0.00	0.02	0.00	0.02	0.01	0.02	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.08
Newtongrange Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pentland Retail Park	0.22	0.57	0.91	0.58	0.36	0.50	1.03	0.10	0.21	0.04	4.51	1.23	2.05	0.62	0.59	4.48	8.99
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Asda Straiton	0.00	0.00	0.11	0.02	0.00	0.01	0.00	0.00	0.00	0.00	0.15	0.02	0.00	0.00	0.00	0.02	0.17
IKEA	0.06	0.02	0.09	0.07	0.05	0.05	0.07	0.02	0.02	0.02	0.47	0.22	0.19	0.07	0.10	0.58	1.05
Costco	0.00	0.02	0.00	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.03	0.02	0.05	0.00	0.00	0.08	0.11
Penicuik Town Centre	0.00	0.00	0.20	0.00	0.00	0.01	0.02	0.00	0.02	0.00	0.26	0.00	0.00	0.00	0.00	0.00	0.26
Tesco Eastfield Penicuik	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.32**	**0.68**	**1.34**	**0.79**	**0.45**	**0.60**	**1.25**	**0.12**	**0.25**	**0.06**	**5.87**	**1.50**	**2.35**	**0.68**	**0.69**	**5.22**	**11.09**
Outside Midlothian:																	
Edinburgh City Centre	0.10	0.16	0.34	0.19	0.12	0.08	0.13	0.00	0.02	0.04	1.18	1.01	0.80	0.48	0.82	3.10	4.28
Asda Jewel	0.00	0.00	0.00	0.02	0.02	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.11	0.07	0.29	0.47	0.52
Newcraighall (Fort Kinnaird etc)	0.10	0.14	0.02	0.40	0.17	0.01	0.18	0.02	0.02	0.06	1.12	0.05	0.14	0.68	0.91	1.79	2.91
Cameron Toll	0.00	0.02	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.05	0.00	0.14	0.00	0.00	0.14	0.19
Gyle Centre	0.00	0.00	0.02	0.00	0.02	0.02	0.00	0.00	0.02	0.00	0.09	0.25	0.14	0.16	0.00	0.55	0.63
Ocean Terminal	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.03	0.10	0.10
Other in Edinburgh	0.04	0.02	0.02	0.09	0.02	0.00	0.07	0.00	0.02	0.00	0.29	0.20	0.19	0.21	0.03	0.63	0.92
Livingston	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02	0.02	0.00	0.00	0.00	0.02	0.05
Musselburgh	0.02	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.34	0.20	0.54	0.58
Other East Lothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Glasgow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.03	0.03
Peebles	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02
Elsewhere in Scotland	0.00	0.02	0.02	0.02	0.00	0.01	0.02	0.00	0.00	0.00	0.10	0.02	0.00	0.00	0.03	0.06	0.16
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.06	0.14	0.14	0.07	0.05	0.01	0.16	0.02	0.02	0.02	0.68	0.17	0.35	0.23	0.16	0.92	1.60
Total	**0.65**	**1.19**	**1.93**	**1.58**	**0.90**	**0.74**	**1.83**	**0.17**	**0.34**	**0.19**	**9.52**	**3.22**	**4.22**	**2.92**	**3.20**	**13.56**	**23.07**

Table 29
Comparison Spending in Midlothian in 2012
DIY Goods
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total	Overall Total £m
Within Midlothian																	
Dalkeith Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.09	0.09
Tesco Hardengreen	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Bonnyrigg Town Centre	0.00	0.04	0.00	0.07	0.07	0.00	0.22	0.04	0.00	0.00	0.43	0.00	0.00	0.00	0.00	0.00	0.43
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loanhead Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Newtongrange Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.04	0.04
Pentland Retail Park	0.13	0.22	2.00	0.57	0.28	0.76	0.76	0.11	0.32	0.04	5.19	1.14	2.32	0.00	0.05	3.50	8.70
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Asda Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
IKEA	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.09	0.00	0.00	0.09	0.16
Costco	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Penicuik Town Centre	0.00	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.14
Tesco Eastfield Penicuik	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.13**	**0.26**	**2.15**	**0.72**	**0.35**	**0.76**	**0.98**	**0.14**	**0.32**	**0.04**	**5.84**	**1.18**	**2.49**	**0.00**	**0.05**	**3.72**	**9.56**
Outside Midlothian:																	
Edinburgh City Centre	0.06	0.15	0.04	0.04	0.04	0.00	0.04	0.00	0.04	0.00	0.39	0.43	0.18	0.00	0.32	0.93	1.32
Asda Jewel	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.05	0.05
Newcraighall (Fort Kinnaird etc)	0.82	1.43	0.50	1.83	1.05	0.31	1.85	0.11	0.11	0.23	8.25	0.95	4.05	4.74	4.65	14.38	22.63
Cameron Toll	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Gyle Centre	0.00	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.18	0.04	0.00	0.00	0.00	0.04	0.22
Ocean Terminal	0.00	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02
Other in Edinburgh	0.03	0.11	0.36	0.07	0.04	0.14	0.11	0.04	0.04	0.00	0.92	2.76	0.09	0.06	0.00	2.91	3.83
Livingston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Musselburgh	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.04	0.00	0.00	0.06	0.05	0.11	0.15
Other East Lothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.14	0.14	0.14
Glasgow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Peebles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Elsewhere in Scotland	0.00	0.00	0.04	0.00	0.04	0.00	0.04	0.00	0.00	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.11
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.00	0.04	0.00	0.00	0.00	0.02	0.04	0.00	0.04	0.00	0.13	0.00	0.23	0.00	0.09	0.33	0.45
Total	**1.08**	**1.98**	**3.22**	**2.65**	**1.51**	**1.24**	**3.06**	**0.29**	**0.56**	**0.31**	**15.90**	**5.36**	**7.04**	**4.87**	**5.33**	**22.59**	**38.49**

Table 30
Comparison Spending in Midlothian in 2012
Crockery China Glass Pots Pans
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total	Overall Total £m
Within Midlothian																	
Dalkeith Town Centre	0.00	0.03	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.01	0.09	0.02	0.00	0.00	0.00	0.02	0.11
Tesco Hardengreen	0.04	0.11	0.00	0.12	0.04	0.02	0.18	0.02	0.00	0.01	0.54	0.00	0.00	0.00	0.00	0.00	0.54
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loanhead Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Newtongrange Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pentland Retail Park	0.06	0.08	0.32	0.18	0.11	0.17	0.37	0.02	0.06	0.01	1.39	0.26	0.52	0.09	0.04	0.91	2.30
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Asda Straiton	0.00	0.00	0.03	0.00	0.01	0.02	0.02	0.00	0.02	0.00	0.10	0.02	0.00	0.00	0.00	0.02	0.12
IKEA	0.05	0.02	0.13	0.12	0.09	0.05	0.13	0.01	0.04	0.01	0.64	0.28	0.38	0.13	0.24	1.02	1.66
Costco	0.00	0.00	0.01	0.00	0.01	0.02	0.02	0.00	0.00	0.00	0.06	0.02	0.07	0.00	0.04	0.13	0.19
Penicuik Town Centre	0.00	0.00	0.18	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.19	0.00	0.00	0.00	0.00	0.00	0.19
Tesco Eastfield Penicuik	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.06
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.15**	**0.24**	**0.74**	**0.47**	**0.27**	**0.26**	**0.70**	**0.06**	**0.14**	**0.05**	**3.08**	**0.59**	**0.97**	**0.22**	**0.32**	**2.10**	**5.18**
Outside Midlothian:																	
Edinburgh City Centre	0.04	0.13	0.19	0.09	0.03	0.10	0.08	0.01	0.00	0.02	0.70	0.61	0.45	0.29	0.32	1.66	2.36
Asda Jewel	0.07	0.02	0.00	0.06	0.01	0.01	0.02	0.00	0.00	0.00	0.19	0.00	0.13	0.13	0.20	0.46	0.65
Newcraighall (Fort Kinnaird etc)	0.04	0.15	0.01	0.15	0.06	0.00	0.10	0.01	0.00	0.01	0.53	0.08	0.17	0.45	0.49	1.20	1.72
Cameron Toll	0.02	0.02	0.00	0.00	0.01	0.01	0.00	0.00	0.00	0.00	0.06	0.00	0.17	0.00	0.00	0.17	0.23
Gyle Centre	0.01	0.02	0.01	0.00	0.03	0.01	0.02	0.00	0.01	0.00	0.11	0.14	0.00	0.03	0.00	0.16	0.27
Ocean Terminal	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.01	0.00	0.06	0.00	0.13	0.03	0.08	0.24	0.30
Other in Edinburgh	0.00	0.00	0.00	0.03	0.03	0.00	0.00	0.00	0.00	0.00	0.06	0.18	0.07	0.05	0.02	0.32	0.38
Livingston	0.00	0.00	0.01	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.03	0.04	0.07	0.00	0.00	0.11	0.14
Musselburgh	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.00	0.01	0.00	0.03	0.00	0.04	0.35	0.18	0.56	0.59
Other East Lothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.08	0.08
Glasgow	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Peebles	0.00	0.00	0.01	0.00	0.00	0.01	0.00	0.00	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.00	0.02
Elsewhere in Scotland	0.00	0.02	0.01	0.02	0.01	0.00	0.00	0.00	0.00	0.01	0.07	0.04	0.00	0.00	0.02	0.06	0.13
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.02	0.05	0.06	0.05	0.04	0.02	0.03	0.01	0.01	0.01	0.30	0.10	0.11	0.06	0.06	0.33	0.64
Total	**0.35**	**0.65**	**1.06**	**0.87**	**0.50**	**0.41**	**1.01**	**0.10**	**0.19**	**0.10**	**5.24**	**1.77**	**2.32**	**1.61**	**1.76**	**7.46**	**12.70**

Table 31
Comparison Spending in Midlothian in 2012
Chemists Goods
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Midlothian Total £m	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian	Outer Catchment Total	Overall Total £m
Within Midlothian	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m		£m	£m	£m	£m		
Dalkeith Town Centre	0.65	2.58	0.05	1.69	0.34	0.00	0.39	0.09	0.00	0.24	6.04	0.00	0.00	0.10	0.00	0.10	6.14
Tesco Hardengreen	0.05	0.05	0.05	0.34	0.19	0.03	0.61	0.09	0.00	0.05	1.47	0.06	0.00	0.00	0.00	0.06	1.53
Bonnyrigg Town Centre	0.00	0.05	0.00	0.00	0.05	0.03	2.22	0.14	0.00	0.00	2.49	0.00	0.00	0.00	0.00	0.00	2.49
Gorebridge Town Centre	0.00	0.00	0.00	0.00	1.21	0.00	0.00	0.00	0.00	0.00	1.21	0.00	0.00	0.00	0.00	0.00	1.21
Loanhead Town Centre	0.00	0.00	0.05	0.00	0.00	0.65	0.00	0.00	0.04	0.00	0.75	0.00	0.00	0.00	0.00	0.00	0.75
Newtongrange Town Centre	0.00	0.05	0.00	0.73	0.05	0.00	0.00	0.00	0.00	0.00	0.83	0.00	0.00	0.10	0.00	0.10	0.94
Pentland Retail Park	0.05	0.11	0.48	0.11	0.19	0.69	0.44	0.05	0.16	0.00	2.27	0.73	0.81	0.10	0.00	1.65	3.92
Sainsbury Straiton	0.09	0.00	0.32	0.11	0.10	0.44	0.28	0.00	0.12	0.00	1.45	0.43	0.45	0.00	0.00	0.88	2.33
Asda Straiton	0.00	0.00	0.11	0.00	0.05	0.12	0.06	0.05	0.08	0.00	0.46	0.06	0.14	0.10	0.00	0.30	0.76
IKEA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Costco	0.00	0.00	0.05	0.00	0.00	0.03	0.00	0.00	0.04	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.12
Penicuik Town Centre	0.00	0.00	3.96	0.00	0.00	0.03	0.00	0.00	0.04	0.00	4.03	0.00	0.00	0.00	0.07	0.07	4.10
Tesco Eastfield Penicuik	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05
Other in Midlothian	0.47	0.05	0.05	0.45	0.05	0.00	0.00	0.00	0.35	0.05	1.47	0.00	0.14	0.00	0.00	0.14	1.61
Midlothian Total	**1.30**	**2.89**	**5.19**	**3.44**	**2.22**	**2.02**	**4.00**	**0.41**	**0.82**	**0.34**	**22.64**	**1.29**	**1.54**	**0.40**	**0.07**	**3.30**	**25.94**
Outside Midlothian:																	
Edinburgh City Centre	0.09	0.11	0.16	0.17	0.14	0.06	0.17	0.05	0.04	0.05	1.03	2.88	1.81	0.00	0.52	5.21	6.24
Asda Jewel	0.09	0.05	0.00	0.17	0.05	0.00	0.00	0.00	0.00	0.05	0.41	0.00	0.27	0.60	0.82	1.70	2.11
Newcraighall (Fort Kinnaird etc)	0.19	0.16	0.00	0.51	0.05	0.00	0.39	0.05	0.00	0.05	1.38	0.06	0.77	1.46	1.79	4.08	5.46
Cameron Toll	0.14	0.00	0.00	0.06	0.00	0.00	0.17	0.00	0.04	0.00	0.40	0.55	4.21	0.10	0.07	4.93	5.34
Gyle Centre	0.00	0.05	0.05	0.00	0.00	0.06	0.22	0.00	0.04	0.00	0.43	1.29	0.14	0.00	0.07	1.50	1.93
Ocean Terminal	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.06	0.00	0.00	0.00	0.06	0.12
Other in Edinburgh	0.00	0.00	0.00	0.06	0.00	0.00	0.06	0.00	0.04	0.00	0.15	3.12	3.21	0.10	0.07	6.51	6.66
Livingston	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.27	0.00	0.00	0.27	0.32
Musselburgh	0.05	0.05	0.00	0.00	0.00	0.00	0.11	0.00	0.00	0.05	0.26	0.00	0.00	5.33	1.12	6.45	6.71
Other East Lothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.25	4.63	4.88	4.88
Glasgow	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05
Peebles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Elsewhere in Scotland	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.07	0.07	0.13
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.00	0.11	0.05	0.11	0.10	0.00	0.17	0.00	0.00	0.00	0.53	0.06	0.00	0.20	0.00	0.26	0.80
Total	**1.86**	**3.42**	**5.56**	**4.57**	**2.61**	**2.15**	**5.28**	**0.50**	**0.97**	**0.54**	**27.46**	**9.31**	**12.22**	**8.45**	**9.25**	**39.23**	**66.68**

Table 32
Comparison Spending in Midlothian in 2012
Jewellery Watches Clocks
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total	Overall Total £m
Within Midlothian																	
Dalkeith Town Centre	0.06	0.15	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.27	0.00	0.00	0.00	0.00	0.00	0.27
Tesco Hardengreen	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.03	0.00	0.17	0.00	0.00	0.00	0.20	0.00	0.00	0.00	0.00	0.00	0.20
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loanhead Town Centre	0.00	0.00	0.00	0.03	0.00	0.07	0.00	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.00	0.00	0.10
Newtongrange Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Pentland Retail Park	0.06	0.04	0.22	0.06	0.03	0.10	0.20	0.03	0.03	0.00	0.76	0.07	0.24	0.00	0.00	0.32	1.07
Sainsbury Straiton	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Asda Straiton	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.04	0.00	0.05	0.05	0.13	0.16
IKEA	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Costco	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Penicuik Town Centre	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.06
Tesco Eastfield Penicuik	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.11**	**0.19**	**0.40**	**0.15**	**0.09**	**0.17**	**0.37**	**0.03**	**0.03**	**0.00**	**1.54**	**0.11**	**0.24**	**0.05**	**0.05**	**0.45**	**1.99**
Outside Midlothian:																	
Edinburgh City Centre	0.14	0.26	0.77	0.37	0.25	0.20	0.48	0.03	0.05	0.07	2.61	0.97	1.61	0.66	0.93	4.18	6.79
Asda Jewel	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.05	0.05	0.10	0.13
Newcraighall (Fort Kinnaird etc)	0.08	0.19	0.03	0.49	0.13	0.02	0.37	0.03	0.00	0.02	1.36	0.04	0.38	1.07	1.26	2.74	4.10
Cameron Toll	0.03	0.07	0.09	0.09	0.06	0.02	0.03	0.03	0.08	0.00	0.50	0.07	0.62	0.00	0.00	0.69	1.19
Gyle Centre	0.03	0.04	0.09	0.06	0.06	0.10	0.03	0.03	0.08	0.02	0.54	0.79	0.13	0.00	0.00	0.92	1.47
Ocean Terminal	0.03	0.04	0.03	0.06	0.00	0.00	0.03	0.00	0.00	0.00	0.19	0.04	0.00	0.20	0.05	0.29	0.48
Other in Edinburgh	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.40	0.07	0.05	0.00	0.51	0.51
Livingston	0.00	0.04	0.03	0.00	0.00	0.02	0.03	0.00	0.03	0.00	0.14	0.00	0.00	0.00	0.00	0.00	0.14
Musselburgh	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.02	0.02	0.00	0.00	0.20	0.19	0.39	0.41
Other East Lothian	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.05	0.09	0.14	0.18
Glasgow	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.07	0.00	0.00	0.07	0.10
Peebles	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Elsewhere in Scotland	0.06	0.04	0.12	0.00	0.06	0.07	0.03	0.00	0.03	0.00	0.41	0.18	0.18	0.08	0.05	0.48	0.88
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.08	0.19	0.15	0.18	0.16	0.10	0.27	0.03	0.03	0.02	1.21	0.36	0.57	0.25	0.28	1.47	2.68
Total	**0.59**	**1.08**	**1.75**	**1.44**	**0.82**	**0.68**	**1.66**	**0.16**	**0.31**	**0.17**	**8.66**	**2.95**	**3.87**	**2.68**	**2.93**	**12.42**	**21.08**

Table 33
Comparison Spending in Midlothian in 2012
Bicycles / Toys
from 2012 Household Survey

2012 prices

Destination	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Midlothian Total £m	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian	Outer Catchment Total	Overall Total £m
Within Midlothian	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m		£m	£m	£m	£m		
Dalkeith Town Centre	0.06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.06
Tesco Hardengreen	0.00	0.09	0.00	0.04	0.03	0.00	0.10	0.04	0.00	0.00	0.29	0.00	0.00	0.06	0.04	0.11	0.40
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Loanhead Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Newtongrange Town Centre	0.00	0.00	0.00	0.00	0.03	0.00	0.03	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.07
Pentland Retail Park	0.16	0.22	0.52	0.33	0.17	0.32	0.29	0.00	0.10	0.03	2.15	0.56	0.59	0.21	0.13	1.50	3.65
Sainsbury Straiton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Asda Straiton	0.03	0.00	0.04	0.00	0.03	0.04	0.03	0.00	0.00	0.00	0.18	0.04	0.00	0.00	0.00	0.04	0.22
IKEA	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Costco	0.00	0.00	0.04	0.00	0.00	0.02	0.00	0.00	0.00	0.00	0.06	0.04	0.15	0.00	0.04	0.24	0.30
Penicuik Town Centre	0.00	0.00	0.19	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.19	0.00	0.00	0.00	0.00	0.00	0.19
Tesco Eastfield Penicuik	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.25**	**0.31**	**0.79**	**0.36**	**0.28**	**0.38**	**0.49**	**0.04**	**0.10**	**0.03**	**3.03**	**0.64**	**0.74**	**0.28**	**0.22**	**1.88**	**4.91**
Outside Midlothian:																	
Edinburgh City Centre	0.06	0.22	0.45	0.15	0.07	0.10	0.36	0.00	0.07	0.03	1.51	1.09	0.59	0.28	0.58	2.53	4.03
Asda Jewel	0.03	0.00	0.00	0.00	0.03	0.00	0.03	0.00	0.00	0.00	0.10	0.00	0.08	0.15	0.04	0.27	0.37
Newcraighall (Fort Kinnaird etc)	0.22	0.48	0.34	0.83	0.38	0.12	0.65	0.11	0.14	0.10	3.37	0.44	1.67	1.59	1.55	5.25	8.62
Cameron Toll	0.00	0.00	0.04	0.04	0.00	0.02	0.00	0.00	0.00	0.00	0.09	0.00	0.36	0.00	0.00	0.36	0.45
Gyle Centre	0.00	0.00	0.00	0.00	0.00	0.02	0.03	0.00	0.00	0.00	0.05	0.28	0.00	0.00	0.00	0.28	0.33
Ocean Terminal	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.00	0.00	0.00	0.00	0.00	0.09
Other in Edinburgh	0.00	0.00	0.04	0.00	0.03	0.00	0.10	0.00	0.00	0.00	0.17	0.48	0.23	0.15	0.27	1.13	1.30
Livingston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Musselburgh	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.04	0.08	0.21	0.04	0.38	0.42
Other East Lothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.09	0.09	0.09
Glasgow	0.00	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.04
Peebles	0.00	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.00	0.00	0.00	0.00	0.04
Elsewhere in Scotland	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.09	0.09	0.12
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.09	0.09	0.26	0.25	0.10	0.12	0.23	0.04	0.03	0.03	1.25	0.36	0.64	0.37	0.44	1.81	3.07
Total	**0.66**	**1.22**	**1.99**	**1.63**	**0.93**	**0.77**	**1.88**	**0.18**	**0.35**	**0.19**	**9.81**	**3.34**	**4.38**	**3.03**	**3.32**	**14.08**	**23.89**

Table 34
Comparison Spending in Midlothian in 2012
Other Goods

2012 prices

based on average of Household Survey results for similar types of goods

Destination	Zone 1 Danderhall	Zone 2 Dalkeith Town	Zone 3 Penicuik	Zone 4 Mayfield / Newtongrange	Zone 5 Gorebridge	Zone 6 Loanhead / Damhead	Zone 7 Bonnyrigg / Lasswade	Zone 8 Rosewell	Zone 9 Roslin	Zone 10 Pathhead / Fala	Midlothian Total £m	Zone 11 Edinburgh SW	Zone 12 Edinburgh SE	Zone 13 Musselburgh	Zone 14 Western E Lothian	Outer Catchment Total	Overall Total £m
Within Midlothian	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m		£m	£m	£m	£m		
Dalkeith Town Centre	0.10	0.15	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.32	0.00	0.12	0.00	0.00	0.12	0.44
Tesco Hardengreen	0.11	0.18	0.09	0.17	0.18	0.02	0.18	0.05	0.00	0.00	0.97	0.00	0.08	0.09	0.03	0.20	1.18
Bonnyrigg Town Centre	0.00	0.02	0.00	0.04	0.06	0.00	0.23	0.02	0.00	0.00	0.37	0.00	0.00	0.00	0.00	0.00	0.37
Gorebridge Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.03	0.03
Loanhead Town Centre	0.03	0.00	0.03	0.05	0.00	0.07	0.18	0.00	0.00	0.00	0.36	0.03	0.00	0.00	0.00	0.03	0.39
Newtongrange Town Centre	0.03	0.00	0.00	0.00	0.02	0.00	0.02	0.00	0.00	0.00	0.07	0.02	0.00	0.00	0.00	0.02	0.09
Pentland Retail Park	0.34	0.48	3.45	0.94	0.60	1.52	1.87	0.23	0.57	0.04	10.05	2.57	3.66	0.26	0.23	6.72	16.77
Sainsbury Straiton	0.00	0.00	0.02	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.05	0.00	0.00	0.00	0.00	0.00	0.05
Asda Straiton	0.02	0.00	0.11	0.00	0.02	0.04	0.05	0.00	0.00	0.00	0.24	0.04	0.00	0.03	0.03	0.10	0.34
IKEA	0.00	0.03	0.00	0.04	0.02	0.00	0.02	0.00	0.00	0.00	0.11	0.00	0.05	0.00	0.00	0.05	0.16
Costco	0.00	0.10	0.10	0.11	0.04	0.16	0.20	0.00	0.03	0.00	0.74	0.06	0.18	0.09	0.07	0.39	1.13
Penicuik Town Centre	0.00	0.00	0.53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.53	0.00	0.00	0.00	0.00	0.00	0.53
Tesco Eastfield Penicuik	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.03
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Midlothian Total	**0.62**	**0.97**	**4.35**	**1.42**	**0.94**	**1.81**	**2.79**	**0.31**	**0.60**	**0.04**	**13.85**	**2.76**	**4.10**	**0.47**	**0.35**	**7.68**	**21.53**
Outside Midlothian:																	
Edinburgh City Centre	0.31	0.83	1.61	0.63	0.49	0.39	1.02	0.04	0.19	0.12	5.65	4.07	3.77	1.16	2.39	11.39	17.03
Asda Jewel	0.11	0.07	0.00	0.07	0.02	0.02	0.05	0.00	0.00	0.03	0.37	0.03	0.40	0.35	0.26	1.04	1.41
Newcraighall (Fort Kinnaird etc)	1.35	2.32	0.90	3.71	1.84	0.43	2.99	0.23	0.32	0.48	14.58	1.08	6.45	8.88	8.55	24.96	39.54
Cameron Toll	0.06	0.08	0.08	0.11	0.10	0.06	0.02	0.02	0.04	0.03	0.60	0.22	0.87	0.00	0.00	1.09	1.69
Gyle Centre	0.02	0.09	0.23	0.04	0.04	0.09	0.04	0.02	0.09	0.01	0.66	1.09	0.23	0.06	0.04	1.41	2.07
Ocean Terminal	0.02	0.07	0.05	0.04	0.00	0.03	0.02	0.00	0.00	0.00	0.22	0.02	0.00	0.17	0.07	0.26	0.48
Other in Edinburgh	0.05	0.13	0.33	0.14	0.15	0.14	0.18	0.02	0.05	0.00	1.18	3.39	0.62	0.20	0.23	4.45	5.63
Livingston	0.00	0.06	0.05	0.07	0.00	0.01	0.05	0.00	0.04	0.00	0.27	0.07	0.22	0.00	0.08	0.37	0.64
Musselburgh	0.00	0.03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.04	0.06	0.02	0.05	0.76	0.34	1.16	1.22
Other East Lothian	0.00	0.05	0.00	0.00	0.00	0.00	0.03	0.00	0.00	0.00	0.09	0.00	0.00	0.03	0.59	0.62	0.70
Glasgow	0.00	0.00	0.05	0.02	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.03	0.04	0.00	0.04	0.11	0.18
Peebles	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.07
Elsewhere in Scotland	0.03	0.02	0.12	0.13	0.12	0.06	0.09	0.03	0.04	0.00	0.64	0.14	0.26	0.04	0.12	0.56	1.21
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	0.29	0.54	0.71	0.67	0.32	0.29	0.82	0.10	0.11	0.06	3.92	1.47	1.88	0.94	1.23	5.51	9.43
Total	**2.86**	**5.26**	**8.56**	**7.03**	**4.01**	**3.31**	**8.11**	**0.77**	**1.49**	**0.82**	**42.23**	**14.38**	**18.88**	**13.06**	**14.30**	**60.62**	**102.84**

Table 35
Total Comparison Spending in Midlothian, 2012
All Goods

2012 prices

Total of all spending in Tables 21 to 34

Destination	Zone 1 Danderhall £m	Zone 2 Dalkeith Town £m	Zone 3 Penicuik £m	Zone 4 Mayfield / Newtongrange £m	Zone 5 Gorebridge £m	Zone 6 Loanhead / Damhead £m	Zone 7 Bonnyrigg / Lasswade £m	Zone 8 Rosewell £m	Zone 9 Roslin £m	Zone 10 Pathhead / Fala £m	Midlothian Total £m	Zone 11 Edinburgh SW £m	Zone 12 Edinburgh SE £m	Zone 13 Musselburgh £m	Zone 14 Western E Lothian £m	Outer Catchment Total £m	Trade from Borders £m	Overall Total £m	Inflow to Midlothian £m	Inflow to Midlothian %
Within Midlothian																				
Dalkeith Town Centre	1.34	3.73	0.12	2.97	0.67	0.09	1.02	0.09	0.00	0.40	10.41	0.02	0.71	0.10	0.26	1.08	0.00	11.50	1.08	9.4%
Tesco Hardengreen	0.65	1.04	0.45	1.74	1.11	0.15	2.67	0.34	0.00	0.10	8.25	0.06	0.33	0.27	0.11	0.78	0.00	9.04	0.78	8.7%
Bonnyrigg Town Centre	0.00	0.11	0.00	0.19	0.27	0.03	2.99	0.19	0.00	0.00	3.79	0.00	0.00	0.00	0.00	0.00	0.00	3.79	0.00	0.0%
Gorebridge Town Centre	0.10	0.00	0.00	0.00	1.21	0.00	0.00	0.00	0.05	0.00	1.36	0.15	0.00	0.00	0.00	0.15	0.00	1.51	0.15	10.0%
Loanhead Town Centre	0.23	0.00	0.38	0.14	0.02	0.99	0.59	0.00	0.04	0.00	2.38	0.25	0.00	0.00	0.00	0.25	0.00	2.63	0.25	9.5%
Newtongrange Town Centre	0.08	0.20	0.06	0.88	0.19	0.00	0.12	0.00	0.05	0.00	1.57	0.06	0.00	0.10	0.00	0.16	0.00	1.74	0.16	9.4%
Pentland Retail Park	1.96	3.40	15.83	5.17	3.57	7.62	10.39	1.18	2.67	0.25	52.03	13.64	19.08	2.44	2.31	37.47	9.82	99.32	47.29	47.6%
Sainsbury Straiton	0.09	0.00	0.37	0.11	0.10	0.44	0.37	0.00	0.12	0.00	1.59	0.43	0.51	0.00	0.18	1.12	0.00	2.71	1.12	41.2%
Asda Straiton	0.05	0.01	1.72	0.32	0.43	0.64	0.90	0.05	0.23	0.00	4.35	0.63	0.23	0.42	0.07	1.36	0.00	5.71	1.36	23.8%
IKEA	0.21	0.21	0.48	0.45	0.32	0.26	0.65	0.09	0.10	0.10	2.86	0.92	2.05	0.64	1.02	4.62	3.01	10.50	7.63	72.7%
Costco	0.00	0.33	0.39	0.33	0.14	0.60	0.75	0.00	0.12	0.00	2.66	0.38	0.67	0.26	0.25	1.55	0.00	4.21	1.55	36.9%
Penicuik Town Centre	0.00	0.00	7.10	0.13	0.00	0.08	0.10	0.00	0.10	0.00	7.51	0.01	0.00	0.00	0.07	0.08	0.00	7.59	0.08	1.1%
Tesco Eastfield Penicuik	0.00	0.00	0.56	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.00	0.00	0.00	0.00	0.00	0.00	0.56	0.00	0.0%
Other in Midlothian	0.47	0.05	0.05	0.45	0.05	0.00	0.00	0.00	0.35	0.05	1.47	0.00	0.14	0.00	0.00	0.14	0.00	1.61	0.14	8.5%
Midlothian Total	**5.17**	**9.07**	**27.52**	**12.89**	**8.07**	**10.89**	**20.54**	**1.94**	**3.82**	**0.90**	**100.80**	**16.55**	**23.72**	**4.23**	**4.28**	**48.78**	**12.83**	**162.41**	**61.61**	**37.9%**
Outside Midlothian:																				
Edinburgh City Centre	2.26	5.96	10.38	4.41	3.26	3.22	7.09	0.53	1.39	0.89	39.38	28.48	24.40	8.04	15.52	76.43		115.81		
Asda Jewel	0.80	0.63	0.00	1.23	0.31	0.07	0.31	0.00	0.00	0.13	3.48	0.11	2.35	3.61	3.61	9.68		13.15		
Newcraighall (Fort Kinnaird etc)	5.49	10.43	3.45	17.72	8.15	1.81	13.46	1.11	1.30	2.41	65.35	5.38	25.54	42.46	42.59	115.97		181.32		
Cameron Toll	0.66	0.69	0.37	0.84	0.59	0.54	0.63	0.17	0.25	0.23	4.97	1.75	12.88	0.34	0.31	15.27		20.25		
Gyle Centre	0.28	0.96	3.33	0.10	0.54	1.08	1.31	0.17	0.62	0.04	8.44	12.09	5.99	1.05	0.75	19.89		28.32		
Ocean Terminal	0.25	0.23	0.13	0.60	0.02	0.24	0.19	0.13	0.15	0.00	1.96	0.12	0.46	1.87	0.68	3.13		5.09		
Other in Edinburgh	0.73	0.58	1.50	1.10	0.84	0.62	1.18	0.06	0.33	0.00	6.93	15.23	7.22	2.61	1.78	26.85		33.78		
Livingston	0.10	0.40	0.39	0.52	0.33	0.25	0.53	0.13	0.44	0.00	3.10	1.10	2.19	0.00	0.59	3.88		6.98		
Musselburgh	0.17	0.29	0.00	0.01	0.02	0.03	0.13	0.00	0.01	0.15	0.82	0.06	0.18	10.42	3.27	13.94		14.76		
Other East Lothian	0.10	0.15	0.15	0.00	0.00	0.09	0.11	0.00	0.00	0.00	0.60	0.00	0.00	0.33	7.45	7.79		8.38		
Glasgow	0.00	0.00	0.32	0.05	0.00	0.00	0.13	0.00	0.00	0.00	0.50	0.23	0.43	0.00	0.24	0.90		1.40		
Peebles	0.00	0.00	0.55	0.00	0.00	0.08	0.13	0.00	0.09	0.00	0.86	0.00	0.00	0.00	0.00	0.00		0.86		
Elsewhere in Scotland	0.09	0.42	0.55	0.45	0.66	0.19	0.47	0.09	0.12	0.01	3.04	0.72	1.72	0.47	0.65	3.57		6.61		
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		0.00		
Internet / Mail Order	1.63	2.79	4.39	3.66	2.07	1.38	4.06	0.41	0.73	0.34	21.45	7.29	9.89	5.45	6.85	29.47		50.92		
Total	**17.74**	**32.59**	**53.02**	**43.58**	**24.86**	**20.48**	**50.28**	**4.75**	**9.26**	**5.11**	**261.67**	**89.10**	**116.97**	**80.88**	**88.58**	**375.53**		**637.20**		
Leakage of Expenditure (£m)	12.57	23.52	25.51	30.69	16.79	9.59	29.74	2.81	5.45	4.21	160.87									
Leakage of Expenditure (%)	70.8%	72.2%	48.1%	70.4%	67.5%	46.8%	59.2%	59.1%	58.8%	82.4%	61.5%									

Table 36
Total Comparison Spending
by Category and Destination

2012 prices

Destination	Clothing Footwear	Sports Goods	CDs DVDs	Audio Visual	Portable Domest	Non-port Domest	Furniture Carpets	Textiles Soft Furns	DIY	Crockery Pots	Chemist Goods	Jewellery Clocks	Bicycles Toys	Other	Total
Within Midlothian	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Dalkeith Town Centre	2.20	0.00	0.15	0.22	0.09	0.02	0.74	0.22	0.00	0.09	6.04	0.27	0.06	0.32	10.41
Tesco Hardengreen	1.89	0.09	0.99	1.24	0.58	0.02	0.00	0.13	0.00	0.54	1.47	0.03	0.29	0.97	8.25
Bonnyrigg Town Centre	0.00	0.00	0.00	0.00	0.00	0.00	0.27	0.02	0.43	0.00	2.49	0.20	0.00	0.37	3.79
Gorebridge Town Centre	0.10	0.00	0.00	0.00	0.00	0.00	0.05	0.00	0.00	0.00	1.21	0.00	0.00	0.00	1.36
Loanhead Town Centre	0.30	0.48	0.04	0.03	0.03	0.00	0.21	0.08	0.00	0.00	0.75	0.10	0.00	0.36	2.38
Newtongrange Town Centre	0.00	0.05	0.02	0.00	0.00	0.00	0.53	0.00	0.00	0.00	0.83	0.00	0.07	0.07	1.57
Pentland Retail Park	6.21	4.71	0.28	4.31	0.96	0.69	8.53	4.51	5.19	1.39	2.27	0.76	2.15	10.05	52.03
Sainsbury Straiton	0.00	0.00	0.00	0.06	0.00	0.00	0.00	0.00	0.00	0.00	1.45	0.03	0.00	0.05	1.59
Asda Straiton	2.58	0.00	0.23	0.20	0.18	0.01	0.00	0.15	0.00	0.10	0.46	0.03	0.18	0.24	4.35
IKEA	0.00	0.00	0.00	0.06	0.01	0.01	1.43	0.47	0.07	0.64	0.00	0.03	0.03	0.11	2.86
Costco	0.20	0.08	0.00	1.09	0.13	0.08	0.03	0.03	0.00	0.06	0.12	0.03	0.06	0.74	2.66
Penicuik Town Centre	0.64	0.05	0.14	0.46	0.17	0.04	0.62	0.26	0.14	0.19	4.03	0.06	0.19	0.53	7.51
Tesco Eastfield Penicuik	0.13	0.00	0.15	0.06	0.08	0.00	0.00	0.00	0.00	0.06	0.05	0.00	0.00	0.03	0.56
Other in Midlothian	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.47	0.00	0.00	0.00	1.47
Total in Midlothian	**14.26**	**5.47**	**1.99**	**7.73**	**2.24**	**0.88**	**12.40**	**5.87**	**5.84**	**3.08**	**22.64**	**1.54**	**3.03**	**13.85**	**100.80**
Outside Midlothian:															
Edinburgh City Centre	16.18	1.40	0.88	3.71	0.54	0.43	3.16	1.18	0.39	0.70	1.03	2.61	1.51	5.65	39.38
Asda Jewel	1.37	0.11	0.25	0.39	0.13	0.00	0.07	0.05	0.00	0.19	0.41	0.03	0.10	0.37	3.48
Newcraighall (Fort Kinnaird etc)	15.37	4.25	1.00	7.62	1.17	1.26	4.10	1.12	8.25	0.53	1.38	1.36	3.37	14.58	65.35
Cameron Toll	2.59	0.16	0.11	0.23	0.07	0.01	0.07	0.05	0.03	0.06	0.40	0.50	0.09	0.60	4.97
Gyle Centre	5.60	0.15	0.25	0.20	0.04	0.01	0.13	0.09	0.18	0.11	0.43	0.54	0.05	0.66	8.44
Ocean Terminal	0.97	0.08	0.14	0.00	0.01	0.01	0.11	0.00	0.02	0.06	0.06	0.19	0.09	0.22	1.96
Other in Edinburgh	1.60	0.24	0.10	0.68	0.06	0.06	1.42	0.29	0.92	0.06	0.15	0.00	0.17	1.18	6.93
Livingston	2.15	0.20	0.00	0.11	0.00	0.00	0.12	0.02	0.00	0.03	0.05	0.14	0.00	0.27	3.10
Musselburgh	0.22	0.00	0.03	0.00	0.02	0.02	0.03	0.04	0.04	0.03	0.26	0.02	0.04	0.06	0.82
Other East Lothian	0.30	0.00	0.04	0.11	0.01	0.01	0.00	0.00	0.00	0.00	0.00	0.04	0.00	0.09	0.60
Glasgow	0.26	0.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.05	0.03	0.04	0.07	0.50
Peebles	0.55	0.00	0.00	0.06	0.00	0.00	0.06	0.02	0.00	0.02	0.00	0.03	0.04	0.07	0.86
Elsewhere in Scotland	0.76	0.32	0.00	0.23	0.00	0.01	0.30	0.10	0.11	0.07	0.05	0.41	0.03	0.64	3.04
Outside Scotland	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Internet / Mail Order	3.34	0.74	2.79	3.33	0.49	0.50	2.21	0.68	0.13	0.30	0.53	1.21	1.25	3.92	21.45
Total	**65.53**	**13.17**	**7.57**	**24.41**	**4.79**	**3.19**	**24.20**	**9.52**	**15.90**	**5.24**	**27.46**	**8.66**	**9.81**	**42.23**	**261.67**

Table 37
Trade Draw to All Shopping Destinations
by Comparison Goods Category

Destination	Clothing Footwear	Sports Goods	CDs DVDs	Audio Visual	Portable Domest	Non-port Domest	Furniture Carpets	Textiles Soft Furns	DIY	Crockery Pots	Chemist Goods	Jewellery Clocks	Bicycles Toys	Other	Total
Within Midlothian	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Dalkeith Town Centre	21.2%	0.0%	1.4%	2.1%	0.8%	0.2%	7.1%	2.1%	0.0%	0.9%	58.0%	2.6%	0.6%	3.1%	100.0%
Tesco Hardengreen	22.9%	1.1%	11.9%	15.1%	7.0%	0.3%	0.0%	1.6%	0.0%	6.6%	17.8%	0.4%	3.5%	11.8%	100.0%
Bonnyrigg Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.1%	0.6%	11.4%	0.0%	65.7%	5.3%	0.0%	9.8%	100.0%
Gorebridge Town Centre	7.4%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	89.0%	0.0%	0.0%	0.0%	100.0%
Loanhead Town Centre	12.7%	20.3%	1.6%	1.3%	1.4%	0.0%	8.9%	3.4%	0.0%	0.0%	31.3%	4.1%	0.0%	15.1%	100.0%
Newtongrange Town Centre	0.0%	3.2%	1.5%	0.0%	0.0%	0.0%	33.7%	0.0%	0.0%	0.0%	53.1%	0.0%	4.3%	4.4%	100.0%
Pentland Retail Park	11.9%	9.1%	0.5%	8.3%	1.9%	1.3%	16.4%	8.7%	10.0%	2.7%	4.4%	1.5%	4.1%	19.3%	100.0%
Sainsbury Straiton	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	91.2%	1.9%	0.0%	3.3%	100.0%
Asda Straiton	59.2%	0.0%	5.2%	4.7%	4.2%	0.1%	0.0%	3.4%	0.0%	2.3%	10.5%	0.7%	4.1%	5.5%	100.0%
IKEA	0.0%	0.0%	0.0%	1.9%	0.4%	0.4%	49.8%	16.4%	2.5%	22.4%	0.0%	1.1%	1.1%	3.9%	100.0%
Costco	7.7%	2.9%	0.0%	41.0%	4.9%	3.1%	1.2%	1.3%	0.0%	2.3%	4.6%	1.2%	2.2%	27.7%	100.0%
Penicuik Town Centre	8.5%	0.7%	1.9%	6.1%	2.2%	0.6%	8.2%	3.4%	1.9%	2.5%	53.6%	0.8%	2.5%	7.0%	100.0%
Tesco Eastfield Penicuik	22.8%	0.0%	26.3%	10.4%	14.2%	0.0%	0.0%	0.0%	0.0%	10.6%	9.6%	0.0%	0.0%	6.1%	100.0%
Other in Midlothian	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	100.0%
Outside Midlothian:															
Edinburgh City Centre	41.1%	3.6%	2.2%	9.4%	1.4%	1.1%	8.0%	3.0%	1.0%	1.8%	2.6%	6.6%	3.8%	14.3%	100.0%
Asda Jewel	39.5%	3.2%	7.1%	11.3%	3.9%	0.1%	2.1%	1.4%	0.0%	5.4%	11.8%	0.8%	2.8%	10.6%	100.0%
Newcraighall (Fort Kinnaird etc)	23.5%	6.5%	1.5%	11.7%	1.8%	1.9%	6.3%	1.7%	12.6%	0.8%	2.1%	2.1%	5.2%	22.3%	100.0%
Cameron Toll	52.0%	3.3%	2.2%	4.5%	1.5%	0.2%	1.4%	0.9%	0.6%	1.3%	8.1%	10.1%	1.9%	12.0%	100.0%
Gyle Centre	66.4%	1.7%	3.0%	2.4%	0.5%	0.1%	1.5%	1.0%	2.1%	1.3%	5.1%	6.4%	0.6%	7.8%	100.0%
Ocean Terminal	49.8%	4.0%	7.0%	0.0%	0.5%	0.4%	5.9%	0.0%	1.0%	3.1%	2.9%	9.8%	4.5%	11.3%	100.0%
Other in Edinburgh	23.1%	3.5%	1.4%	9.8%	0.8%	0.9%	20.5%	4.1%	13.3%	0.9%	2.2%	0.0%	2.4%	17.1%	100.0%
Livingston	69.4%	6.5%	0.0%	3.5%	0.0%	0.0%	3.9%	0.8%	0.0%	1.0%	1.6%	4.7%	0.0%	8.6%	100.0%
Musselburgh	27.3%	0.0%	3.2%	0.0%	2.8%	1.9%	3.8%	5.4%	4.7%	3.5%	31.5%	2.9%	5.3%	7.6%	100.0%
Other East Lothian	50.5%	0.0%	6.3%	18.9%	1.9%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%	0.0%	14.8%	100.0%
Glasgow	51.6%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.8%	6.2%	7.6%	13.9%	100.0%
Peebles	64.0%	0.0%	0.0%	6.7%	0.0%	0.0%	7.5%	2.6%	0.0%	2.6%	0.0%	3.6%	4.4%	8.6%	100.0%
Elsewhere in Scotland	25.1%	10.5%	0.0%	7.6%	0.0%	0.3%	10.0%	3.4%	3.5%	2.4%	1.8%	13.3%	1.1%	21.1%	100.0%
Internet / Mail Order	15.6%	3.5%	13.0%	15.5%	2.3%	2.3%	10.3%	3.2%	0.6%	1.4%	2.5%	5.7%	5.8%	18.3%	100.0%

Table 38
Market Share of All Shopping Destinations
by Comparison Goods Category

Destination	Clothing Footwear	Sports Goods	CDs DVDs	Audio Visual	Portable Domest	Non-port Domest	Furniture Carpets	Textiles Soft Furns	DIY	Crockery Pots	Chemist Goods	Jewellery Clocks	Bicycles Toys	Other	Total
Within Midlothian	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Dalkeith Town Centre	3.4%	0.0%	2.0%	0.9%	1.8%	0.7%	3.1%	2.3%	0.0%	1.7%	22.0%	3.1%	0.6%	0.8%	4.0%
Tesco Hardengreen	2.9%	0.7%	13.0%	5.1%	12.1%	0.7%	0.0%	1.4%	0.0%	10.4%	5.3%	0.4%	3.0%	2.3%	3.2%
Bonnyrigg Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.2%	2.7%	0.0%	9.1%	2.3%	0.0%	0.9%	1.4%
Gorebridge Town Centre	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%	0.5%
Loanhead Town Centre	0.5%	3.7%	0.5%	0.1%	0.7%	0.0%	0.9%	0.8%	0.0%	0.0%	2.7%	1.1%	0.0%	0.9%	0.9%
Newtongrange Town Centre	0.0%	0.4%	0.3%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	3.0%	0.0%	0.7%	0.2%	0.6%
Pentland Retail Park	9.5%	35.8%	3.7%	17.7%	20.1%	21.6%	35.2%	47.4%	32.6%	26.6%	8.3%	8.7%	21.9%	23.8%	19.9%
Sainsbury Straiton	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	0.4%	0.0%	0.1%	0.6%
Asda Straiton	3.9%	0.0%	3.0%	0.8%	3.9%	0.2%	0.0%	1.6%	0.0%	1.9%	1.7%	0.4%	1.8%	0.6%	1.7%
IKEA	0.0%	0.0%	0.0%	0.2%	0.2%	0.4%	5.9%	4.9%	0.5%	12.2%	0.0%	0.4%	0.3%	0.3%	1.1%
Costco	0.3%	0.6%	0.0%	4.5%	2.7%	2.6%	0.1%	0.4%	0.0%	1.2%	0.4%	0.4%	0.6%	1.7%	1.0%
Penicuik Town Centre	1.0%	0.4%	1.8%	1.9%	3.5%	1.3%	2.5%	2.7%	0.9%	3.6%	14.7%	0.7%	1.9%	1.3%	2.9%
Tesco Eastfield Penicuik	0.2%	0.0%	1.9%	0.2%	1.6%	0.0%	0.0%	0.0%	0.0%	1.1%	0.2%	0.0%	0.0%	0.1%	0.2%
Other in Midlothian	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%	0.6%
Total for Midlothian	**21.8%**	**41.5%**	**26.3%**	**31.7%**	**46.7%**	**27.5%**	**51.2%**	**61.7%**	**36.7%**	**58.7%**	**82.5%**	**17.7%**	**30.9%**	**32.8%**	38.5%
Outside Midlothian:															
Edinburgh City Centre	24.7%	10.7%	11.6%	15.2%	11.3%	13.4%	13.1%	12.4%	2.4%	13.3%	3.8%	30.2%	15.3%	13.4%	15.0%
Asda Jewel	2.1%	0.8%	3.2%	1.6%	2.8%	0.1%	0.3%	0.5%	0.0%	3.6%	1.5%	0.3%	1.0%	0.9%	1.3%
Newcraighall (Fort Kinnaird etc)	23.4%	32.3%	13.3%	31.2%	24.4%	39.5%	16.9%	11.7%	51.9%	10.1%	5.0%	15.7%	34.3%	34.5%	25.0%
Cameron Toll	3.9%	1.2%	1.5%	0.9%	1.5%	0.3%	0.3%	0.5%	0.2%	1.2%	1.5%	5.8%	1.0%	1.4%	1.9%
Gyle Centre	8.5%	1.1%	3.3%	0.8%	0.9%	0.2%	0.5%	0.9%	1.1%	2.1%	1.6%	6.3%	0.5%	1.6%	3.2%
Ocean Terminal	1.5%	0.6%	1.8%	0.0%	0.2%	0.2%	0.5%	0.0%	0.1%	1.2%	0.2%	2.2%	0.9%	0.5%	0.7%
Other in Edinburgh	2.4%	1.8%	1.3%	2.8%	1.2%	2.0%	5.9%	3.0%	5.8%	1.1%	0.5%	0.0%	1.7%	2.8%	2.6%
Livingston	3.3%	1.5%	0.0%	0.4%	0.0%	0.0%	0.5%	0.3%	0.0%	0.6%	0.2%	1.7%	0.0%	0.6%	1.2%
Musselburgh	0.3%	0.0%	0.3%	0.0%	0.5%	0.5%	0.1%	0.5%	0.2%	0.5%	0.9%	0.3%	0.4%	0.1%	0.3%
Other East Lothian	0.5%	0.0%	0.5%	0.5%	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	0.2%	0.2%
Glasgow	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.4%	0.4%	0.2%	0.2%
Peebles	0.8%	0.0%	0.0%	0.2%	0.0%	0.0%	0.3%	0.2%	0.0%	0.4%	0.0%	0.4%	0.4%	0.2%	0.3%
Elsewhere in Scotland	1.2%	2.4%	0.0%	0.9%	0.0%	0.2%	1.3%	1.1%	0.7%	1.4%	0.2%	4.7%	0.4%	1.5%	1.2%
Outside Scotland	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%
Internet / Mail Order	5.1%	5.6%	36.9%	13.7%	10.2%	15.8%	9.1%	7.2%	0.8%	5.8%	1.9%	14.0%	12.8%	9.3%	8.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Midlothian Retained Share of Spending	21.8%	41.5%	26.3%	31.7%	46.7%	27.5%	51.2%	61.7%	36.7%	58.7%	82.5%	17.7%	30.9%	32.8%	38.5%
Leakage from Midlothian	78.2%	58.5%	73.7%	68.3%	53.3%	72.5%	48.8%	38.3%	63.3%	41.3%	17.5%	82.3%	69.1%	67.2%	61.5%

Table 39
Market Share of All Shopping Destinations by Area of Spending Origin

Destination	Danderhall	Dalkeith Town	Penicuik	Mayfield / Newtongrange	Gorebridge	Loanhead / Damhead	Bonnyrigg / Lasswade	Rosewell	Roslin	Pathhead / Fala	Total
Within Midlothian	%	%	%	%	%	%	%	%	%	%	%
Dalkeith Town Centre	7.6%	11.4%	0.2%	6.8%	2.7%	0.4%	2.0%	1.9%	0.0%	7.8%	4.0%
Tesco Hardengreen	3.7%	3.2%	0.9%	4.0%	4.5%	0.7%	5.3%	7.2%	0.0%	2.0%	3.2%
Bonnyrigg Town Centre	0.0%	0.3%	0.0%	0.4%	1.1%	0.2%	6.0%	4.1%	0.0%	0.0%	1.4%
Gorebridge Town Centre	0.6%	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.5%	0.0%	0.5%
Loanhead Town Centre	1.3%	0.0%	0.7%	0.3%	0.1%	4.8%	1.2%	0.0%	0.4%	0.0%	0.9%
Newtongrange Town Centre	0.4%	0.6%	0.1%	2.0%	0.8%	0.0%	0.2%	0.0%	0.5%	0.0%	0.6%
Pentland Retail Park	11.1%	10.4%	29.9%	11.9%	14.3%	37.2%	20.7%	24.8%	28.8%	4.9%	19.9%
Sainsbury Straiton	0.5%	0.0%	0.7%	0.3%	0.4%	2.1%	0.7%	0.0%	1.3%	0.0%	0.6%
Asda Straiton	0.3%	0.0%	3.2%	0.7%	1.7%	3.1%	1.8%	1.0%	2.5%	0.0%	1.7%
IKEA	1.2%	0.6%	0.9%	1.0%	1.3%	1.3%	1.3%	1.9%	1.1%	1.9%	1.1%
Costco	0.0%	1.0%	0.7%	0.8%	0.6%	2.9%	1.5%	0.0%	1.3%	0.0%	1.0%
Penicuik Town Centre	0.0%	0.0%	13.4%	0.3%	0.0%	0.4%	0.2%	0.0%	1.0%	0.0%	2.9%
Tesco Eastfield Penicuik	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Other in Midlothian	2.6%	0.2%	0.1%	1.0%	0.2%	0.0%	0.0%	0.0%	3.8%	1.0%	0.6%
Outside Midlothian:											
Edinburgh City Centre	12.7%	18.3%	19.6%	10.1%	13.1%	15.7%	14.1%	11.1%	15.0%	17.5%	15.0%
Asda Jewel	4.5%	1.9%	0.0%	2.8%	1.2%	0.3%	0.6%	0.0%	0.0%	2.6%	1.3%
Newcraighall (Fort Kinnaird etc)	31.0%	32.0%	6.5%	40.7%	32.8%	8.8%	26.8%	23.4%	14.1%	47.3%	25.0%
Cameron Toll	3.7%	2.1%	0.7%	1.9%	2.4%	2.6%	1.3%	3.7%	2.7%	4.4%	1.9%
Gyle Centre	1.6%	3.0%	6.3%	0.2%	2.2%	5.3%	2.6%	3.7%	6.7%	0.8%	3.2%
Ocean Terminal	1.4%	0.7%	0.3%	1.4%	0.1%	1.2%	0.4%	2.8%	1.6%	0.0%	0.7%
Other in Edinburgh	4.1%	1.8%	2.8%	2.5%	3.4%	3.0%	2.3%	1.2%	3.6%	0.0%	2.6%
Livingston	0.6%	1.2%	0.7%	1.2%	1.3%	1.2%	1.1%	2.8%	4.8%	0.0%	1.2%
Musselburgh	1.0%	0.9%	0.0%	0.0%	0.1%	0.2%	0.3%	0.0%	0.1%	2.9%	0.3%
Other East Lothian	0.6%	0.5%	0.3%	0.0%	0.0%	0.4%	0.2%	0.0%	0.0%	0.0%	0.2%
Glasgow	0.0%	0.0%	0.6%	0.1%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.2%
Peebles	0.0%	0.0%	1.0%	0.0%	0.0%	0.4%	0.3%	0.0%	1.0%	0.0%	0.3%
Elsewhere in Scotland	0.5%	1.3%	1.0%	1.0%	2.7%	0.9%	0.9%	1.9%	1.3%	0.2%	1.2%
Outside Scotland	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Internet / Mail Order	9.2%	8.5%	8.3%	8.4%	8.3%	6.7%	8.1%	8.6%	7.9%	6.7%	8.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Retention of Expenditure in Midlothian (%)	29.2%	27.8%	51.9%	29.6%	32.5%	53.2%	40.8%	40.9%	41.2%	17.6%	38.5%
Leakage of Expenditure from Midlothian (%)	70.8%	72.2%	48.1%	70.4%	67.5%	46.8%	59.2%	59.1%	58.8%	82.4%	61.5%

Table 40
Trade Draw of All Shopping Destinations
by Area of Spending Origin

Destination	Danderhall	Dalkeith Town	Penicuik	Mayfield / Newtongrange	Gorebridge	Loanhead / Damhead	Bonnyrigg / Lasswade	Rosewell	Roslin	Pathhead / Fala	Total
Within Midlothian	%	%	%	%	%	%	%	%	%	%	%
Dalkeith Town Centre	12.9%	35.8%	1.1%	28.5%	6.4%	0.8%	9.8%	0.9%	0.0%	3.8%	100.0%
Tesco Hardengreen	7.9%	12.6%	5.5%	21.1%	13.4%	1.8%	32.3%	4.2%	0.0%	1.2%	100.0%
Bonnyrigg Town Centre	0.0%	2.9%	0.0%	4.9%	7.2%	0.8%	79.1%	5.1%	0.0%	0.0%	100.0%
Gorebridge Town Centre	7.4%	0.0%	0.0%	0.0%	89.0%	0.0%	0.0%	0.0%	3.5%	0.0%	100.0%
Loanhead Town Centre	9.6%	0.0%	16.0%	5.9%	1.0%	41.3%	24.6%	0.0%	1.6%	0.0%	100.0%
Newtongrange Town Centre	5.0%	12.5%	4.1%	55.8%	12.0%	0.0%	7.6%	0.0%	3.0%	0.0%	100.0%
Pentland Retail Park	3.8%	6.5%	30.4%	9.9%	6.9%	14.6%	20.0%	2.3%	5.1%	0.5%	100.0%
Sainsbury Straiton	5.8%	0.0%	23.2%	7.1%	6.1%	27.3%	23.2%	0.0%	7.3%	0.0%	100.0%
Asda Straiton	1.2%	0.2%	39.4%	7.4%	10.0%	14.8%	20.7%	1.0%	5.3%	0.0%	100.0%
IKEA	7.2%	7.2%	16.8%	15.7%	11.1%	9.0%	22.7%	3.2%	3.6%	3.5%	100.0%
Costco	0.0%	12.3%	14.6%	12.5%	5.2%	22.6%	28.3%	0.0%	4.5%	0.0%	100.0%
Penicuik Town Centre	0.0%	0.0%	94.6%	1.8%	0.0%	1.0%	1.3%	0.0%	1.3%	0.0%	100.0%
Tesco Eastfield Penicuik	0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Other in Midlothian	31.7%	3.6%	3.6%	30.7%	3.3%	0.0%	0.0%	0.0%	23.8%	3.3%	100.0%
Outside Midlothian:											
Edinburgh City Centre	5.7%	15.1%	26.3%	11.2%	8.3%	8.2%	18.0%	1.3%	3.5%	2.3%	100.0%
Asda Jewel	23.0%	18.0%	0.0%	35.4%	8.8%	2.0%	9.0%	0.0%	0.0%	3.8%	100.0%
Newcraighall (Fort Kinnaird etc)	8.4%	16.0%	5.3%	27.1%	12.5%	2.8%	20.6%	1.7%	2.0%	3.7%	100.0%
Cameron Toll	13.3%	13.9%	7.4%	16.8%	11.8%	10.9%	12.7%	3.5%	5.1%	4.5%	100.0%
Gyle Centre	3.4%	11.4%	39.4%	1.2%	6.4%	12.8%	15.6%	2.1%	7.3%	0.5%	100.0%
Ocean Terminal	12.6%	12.0%	6.9%	30.8%	1.2%	12.2%	9.9%	6.8%	7.8%	0.0%	100.0%
Other in Edinburgh	10.6%	8.4%	21.7%	15.8%	12.1%	8.9%	17.0%	0.8%	4.7%	0.0%	100.0%
Livingston	3.3%	12.9%	12.8%	16.7%	10.7%	8.0%	17.1%	4.3%	14.3%	0.0%	100.0%
Musselburgh	21.3%	35.1%	0.0%	1.0%	2.9%	3.8%	16.3%	0.0%	1.5%	18.1%	100.0%
Other East Lothian											
Glasgow	0.0%	0.0%	64.0%	9.8%	0.0%	0.0%	26.1%	0.0%	0.0%	0.0%	100.0%
Peebles	0.0%	0.0%	64.5%	0.0%	0.0%	9.6%	15.1%	0.0%	10.8%	0.0%	100.0%
Elsewhere in Scotland	2.9%	13.7%	18.0%	14.8%	21.7%	6.4%	15.4%	2.9%	3.8%	0.4%	100.0%
Internet / Mail Order	7.6%	13.0%	20.5%	17.0%	9.7%	6.4%	18.9%	1.9%	3.4%	1.6%	100.0%

Table 41
Total Comparison Spending in Midlothian, 2012
Trade Drawn from Sub-Areas
2012 pricea

Destination	Trade Drawn from						Total
	A7 / A68 corridor		A701 corridor		Shawfair area		
	£m	%	£m	%	£m	%	£m
Dalkeith Town Centre	8.87	85.2%	0.20	2.0%	1.34	12.9%	10.41
Tesco Hardengreen	7.00	84.8%	0.60	7.3%	0.65	7.9%	8.25
Bonnyrigg Town Centre	3.76	99.2%	0.03	0.8%	0.00	0.0%	3.79
Gorebridge Town Centre	1.21	89.0%	0.05	3.5%	0.10	7.4%	1.36
Loanhead Town Centre	0.75	31.5%	1.41	58.9%	0.23	9.6%	2.38
Newtongrange Town Centre	1.38	87.9%	0.11	7.1%	0.08	5.0%	1.57
Pentland Retail Park	23.96	46.0%	26.11	50.2%	1.96	3.8%	52.03
Sainsbury Straiton	0.58	36.3%	0.92	57.9%	0.09	5.8%	1.59
Asda Straiton	1.71	39.4%	2.59	59.5%	0.05	1.2%	4.35
IKEA	1.82	63.5%	0.84	29.4%	0.21	7.2%	2.86
Costco	1.55	58.3%	1.11	41.7%	0.00	0.0%	2.66
Penicuik Town Centre	0.23	3.1%	7.28	96.9%	0.00	0.0%	7.51
Tesco Eastfield Penicuik	0.00	0.0%	0.56	100.0%	0.00	0.0%	0.56
Other in Midlothian	0.60	40.9%	0.40	27.4%	0.47	31.7%	1.47
Midlothian Total	53.41	**53.0%**	42.22	**41.9%**	5.17	**5.1%**	100.80

Table 42
Estimate of Additional Turnover at Costco and IKEA, 2012
2012 prices

Costco

Average Turnover per unit, 2011 #	£65.02	m
Convenience Trade (55%) ~	£35.76	m
Comparison Trade (45%) ~	£29.26	m
Comparison Trade incl VAT	£35.11	m
Less wholesale trade (65%) +		
Net convenience trade 2011	£12.52	m
Net comparison trade 2011	£12.29	m
Net convenience trade 2012 *	£12.44	m
Net comparison trade 2012 *	£12.57	m
Trade drawn from survey area		
Convenience	£1.67	m
Comparison	£4.21	m
Inflow from beyond survey area		
Convenience	£10.77	m
Comparison	£8.36	m

IKEA

Average turnover / sq m 2011 #	£2,552	ex VAT
	£3,062	incl VAT
Sales area of Midlothian store	16,200	sq m
Estimated total turnover 2011	£49.61	m
Estimated total turnover 2012 *	£50.75	m
Trade drawn from survey area	£10.50	m
Inflow from beyond survey area	£40.25	m

Notes: # Retail Rankings 2012
~ Costco Company Report 2011
+ estimate based on previous studies
* -0.6% convenience, +2.3% comparison

Table 43
Summary of Leakage and Inflow of Expenditure, Midlothian, 2012
2012 prices

Convenience	£m
Available Convenience Expenditure, 2012 (Table 4)	176.95
Leakage from Midlothian (Table 16)	35.51
Inflow from outer catchment and Borders (Table 16)	36.24
Estimated additional inflow to Costco (Table 42)	10.77
Total Inflow	47.01
Total Convenience Spending in Midlothian in 2012	**188.45**
Comparison	£m
Available Comparison Expenditure, 2012 (Table 4)	261.67
Leakage from Midlothian (Table 35)	160.87
Inflow from outer catchment and Borders (Table 35)	61.61
Estimated additional inflow to Costco / IKEA (Table 42)	48.62
Total Inflow	110.22
Total Comparison Spending in Midlothian in 2012	**211.02**

Table 44
Summary of Leakage and Inflow of Expenditure, Midlothian Sub-Areas, 2012
2012 prices

Convenience	A7/A68 corridor £m	A701 corridor £m	Shawfair area £m	Total Midlothian £m
Available Convenience Expenditure, 2012 (Table 5a)	108.99	55.97	11.99	176.95
Leakage from Sub-Area out of Midlothian (Table 16)	25.01	4.90	5.60	35.51
Leakage to A7/A68 corridor	0.00	1.38	4.72	
Leakage to A701 corridor	16.96	0.00	0.82	
Retained in Sub-Area	67.01	49.69	0.87	
Inflow from outer catchment and Borders (Table 16)	8.34	27.73	0.18	36.24
Inflow from other Midlothian Sub-Area	6.09	17.78	0.00	
Estimated additional inflow to Costco (Table 42)	0.00	10.77	0.00	10.77
Total Inflow	14.43	56.27	0.18	47.01
Total Convenience Spending in Sub-Area in 2012	**81.44**	**105.96**	**1.04**	**188.45**
Comparison	£m	£m	£m	£m
Available Comparison Expenditure, 2012 (Table 6a)	161.17	82.76	17.74	261.67
Leakage from Sub-Area out of Midlothian (Table 35)	107.76	40.55	12.57	160.87
Leakage to A7/A68 corridor	0.00	2.41	2.60	
Leakage to A701 corridor	29.62	0.00	2.54	
Retained in Sub-Area	23.80	39.81	0.03	
Inflow from outer catchment and Borders (Table 35)	2.32	59.29	0.00	61.61
Inflow from other Midlothian Sub-Area	5.01	32.15	0.00	
Estimated additional inflow to Costco / IKEA (Table 42)	0.00	48.62	0.00	48.62
Total Inflow	7.32	140.06	0.00	110.22
Total Comparison Spending in Sub-Area in 2012	**31.12**	**179.87**	**0.03**	**211.02**

Table 45
Summary Results : Estimated Turnover of Shopping Destinations, 2012
2012 prices

	Convenience			**Comparison**			All Retail
	from Midlothian £m	from elsewhere £m	**Total £m**	from Midlothian £m	from elsewhere £m	**Total £m**	Total £m
Dalkeith Town Centre	8.98	0.88	**9.86**	10.41	1.08	**11.50**	21.35
Tesco Hardengreen	52.62	7.31	**59.93**	8.25	0.78	**9.04**	68.97
Bonnyrigg Town Centre	4.25	0.14	**4.39**	3.79	0.00	**3.79**	8.18
Loanhead Town Centre	1.08	0.00	**1.08**	2.38	0.25	**2.63**	3.72
Mayfield Town Centre	2.08	0.00	**2.08**	0.45	0.00	**0.45**	2.53
Newtongrange Town Centre	2.77	0.00	**2.77**	1.57	0.16	**1.74**	4.50
Gorebridge Town Centre	0.26	0.00	**0.26**	1.36	0.15	**1.51**	1.76
Gorebridge Hunterfield	1.56	0.00	**1.56**	0.00	0.00	**0.00**	1.56
Penicuik Town Centre	4.68	0.00	**4.68**	7.51	0.08	**7.59**	12.28
Tesco Eastfield	17.68	1.60	**19.28**	0.56	0.00	**0.56**	19.83
Straiton							
Pentland Retail Park	0.00	0.00	**0.00**	52.03	47.29	**99.32**	99.32
Sainsbury	18.76	14.95	**33.71**	1.59	1.12	**2.71**	36.42
Asda	21.63	7.95	**29.59**	4.35	1.36	**5.71**	35.30
M&S	1.83	2.42	**4.25**	0.00	0.00	**0.00**	4.25
IKEA	0.00	0.00	**0.00**	2.86	47.89	**50.75**	50.75
Costco	0.86	11.58	**12.44**	2.66	9.91	**12.57**	25.01
Danderhall	0.87	0.18	**1.04**	0.03	0.00	**0.03**	1.08
Roslin	0.79	0.00	**0.79**	0.10	0.00	**0.10**	0.90
Local Shops	0.74	0.00	**0.74**	0.88	0.14	**1.02**	1.76
Total Midlothian	**141.44**	**47.01**	**188.45**	**100.80**	**110.22**	**211.02**	**399.47**
Edinburgh City Centre	0.00	n/a	n/a	39.38	n/a	n/a	n/a
Asda Jewel	10.50	n/a	n/a	3.48	n/a	n/a	n/a
Morrisons Moredun	9.66	n/a	n/a	0.00	n/a	n/a	n/a
Morrisons Hunters Tryst	0.92	n/a	n/a	0.00	n/a	n/a	n/a
Tesco Colinton Mains	0.46	n/a	n/a	0.00	n/a	n/a	n/a
Newcraighall (Fort Kinnaird etc)	0.39	n/a	n/a	65.35	n/a	n/a	n/a
Cameron Toll	2.67	n/a	n/a	4.97	n/a	n/a	n/a
Gyle Centre	1.46	n/a	n/a	8.44	n/a	n/a	n/a
Ocean Terminal	0.00	n/a	n/a	1.96	n/a	n/a	n/a
Other in Edinburgh	4.38	n/a	n/a	6.93	n/a	n/a	n/a
Livingston	0.00	n/a	n/a	3.10	n/a	n/a	n/a
Musselburgh	2.13	n/a	n/a	0.82	n/a	n/a	n/a
Elsewhere in Scotland	0.42	n/a	n/a	5.00	n/a	n/a	n/a
Outside Scotland	0.00	n/a	n/a	0.00	n/a	n/a	n/a
Internet / Mail Order	2.52	n/a	n/a	21.45	n/a	n/a	n/a
Total Outside Midlothian	**35.51**	n/a	n/a	**160.87**	n/a	n/a	n/a
Total	**176.95**	n/a	n/a	**261.67**	n/a	n/a	n/a

	Convenience			Comparison		
	Floorspace Gross sq m	Floorspace Sales sq m	Turnover p sq m £	Floorspace Gross sq m	Floorspace Sales sq m	Turnover p sq m £
Dalkeith Town Centre	2,432	1,459	£6,754	8,029	4,817	£2,387
Tesco Hardengreen	4,175	2,296	£26,100	1,789	984	£9,183
Bonnyrigg Town Centre	2,292	1,375	£3,192	2,670	1,735	£2,183
Loanhead Town Centre	1,033	620	£1,746	290	189	£13,976
Mayfield Town Centre	1,104	662	£3,134	273	177	£2,545
Newtongrange Town Centre	1,711	1,027	£2,695	740	518	£3,350
Gorebridge Town Centre	612	367	£704	145	94	£15,979
Gorebridge Hunterfield	1,451	871	£1,792	0	0	£0
Penicuik Town Centre	2,173	1,304	£3,593	3,338	2,170	£3,499
Tesco Eastfield	2,700	1,620	£11,898	900	540	£1,028
Straiton						
Pentland Retail Park	0	0	£0	26,539	19,901	£4,991
Sainsbury	6,140	3,377	£9,983	2,047	1,126	£2,410
Asda	4,831	2,717	£10,889	2,601	1,463	£3,904
M&S	929	557	£7,619	0	0	£0
IKEA	0	0	£0	18,000	16,200	£3,133
Costco	3,979	3,383	£3,678	8,741	7,430	£1,692
Danderhall	506	304	£3,433	42	25	£1,303
Roslin	573	344	£2,307	121	73	£1,438
Local Shops	4,781	2,869	£259	1,417	850	£1,196
Total Midlothian	**41,422**	**25,151**		**77,682**	**58,291**	

Table 46
Notional and Actual Turnover of Existing Centres, 2012
2012 prices

	Convenience						Comparison					
	Floorspace		Notional Turnover		Actual	Over/Under	Floorspace		Notional Turnover		Actual	Over/Under
	Gross sq m	Sales sq m	p sq m £	Total £m	Turnover £m	Trading £m	Gross sq m	Sales sq m	p sq m £	Total £m	Turnover £m	Trading £m
Dalkeith Town Centre	2,432	1,459	£4,250	6.20	9.86	3.65	8,029	4,817	£2,750	13.25	11.50	-1.75
Tesco Hardengreen	4,175	2,296	£10,000	22.96	59.93	36.97	1,789	984	£4,000	3.94	9.04	5.10
Bonnyrigg Town Centre	2,292	1,375	£3,750	5.16	4.39	-0.77	2,670	1,735	£2,500	4.34	3.79	-0.55
Loanhead Town Centre	1,033	620	£2,750	1.70	1.08	-0.62	290	189	£1,750	0.33	2.63	2.30
Mayfield Town Centre	1,104	662	£2,750	1.82	2.08	0.25	273	177	£1,750	0.31	0.45	0.14
Newtongrange Town Centre	1,711	1,027	£3,750	3.85	2.77	-1.08	740	518	£1,750	0.91	1.74	0.83
Gorebridge Town Centre	612	367	£2,750	1.01	0.26	-0.75	145	94	£1,750	0.16	1.51	1.34
Gorebridge Hunterfield	1,451	871	£3,500	3.05	1.56	-1.49	0	0	£1,750	0.00	0.00	0.00
Penicuik Town Centre	2,173	1,304	£4,000	5.22	4.68	-0.53	3,338	2,170	£2,500	5.42	7.59	2.17
Tesco Eastfield	2,700	1,620	£9,000	14.58	19.28	4.70	900	540	£3,500	1.89	0.56	-1.33
Straiton												
Pentland Retail Park	0	0	£0	0.00	0.00	0.00	26,539	19,901	£3,500	69.65	99.32	29.67
Sainsbury	6,140	3,377	£10,000	33.77	33.71	-0.06	2,047	1,126	£4,000	4.50	2.71	-1.79
Asda	4,831	2,717	£10,000	27.17	29.59	2.42	2,601	1,463	£4,000	5.85	5.71	-0.14
M&S	929	557	£10,000	5.57	4.25	-1.33	0	0	£0	0.00	0.00	0.00
IKEA	0	0	£0	0.00	0.00	0.00	18,000	16,200	£3,000	48.60	50.75	2.15
Costco *	3,979	3,383	£3,500	11.84	12.44	0.60	8,741	7,430	£1,600	11.89	12.57	0.68
Danderhall	506	304	£2,250	0.68	1.04	0.36	42	25	£1,750	0.04	0.03	-0.01
Roslin	573	344	£2,250	0.77	0.79	0.02	121	73	£1,750	0.13	0.10	-0.02
Local Shops	4,781	2,869	£1,500	4.30	0.74	-3.56	1,417	850	£1,250	1.06	1.02	-0.05
Total				149.66	188.45	38.78				172.28	211.02	38.74

Note: * excl wholesale trade

Table 47
Estimated Notional Turnover of Committed Retail Floorspace, 2012
2012 prices

	Convenience				Comparison			
	Floorspace		Notional Turnover		Floorspace		Notional Turnover	
	Gross sq m	Sales sq m	p sq m £	Total £m	Gross sq m	Sales sq m	p sq m £	Total £m
Dalkeith Bus Station	3,720	2,508	£10,000	25.08	414	279	£4,000	1.12
Dalkeith Forrest Furnishing	885	650	£4,000	2.60	115	85	£2,500	0.21
Bonnyrigg Hopefield	540	396	£4,000	1.58	540	396	£2,500	0.99
Gorebridge Arniston	1,025	760	£4,000	3.04	135	100	£2,500	0.25
Penicuik Aldi Eastfield	1,378	975	£4,000	3.90	140	100	£2,500	0.25
Straiton								
Pentland Retail Park					8,263	5,784	£3,500	20.24
Pentland Retail Park North Extension					9,434	6,618	£3,500	23.16
Sainsbury	1,827	1,033	£10,000	10.33	1,911	1,080	£4,000	4.32
Straiton Park Callyr Inn					865	778	£2,500	1.95
Total	**9,375**	**6,322**		**46.53**	**21,817**	**15,220**		**52.49**

Floorspace Estimates: Midlothian Council

Table 48
Estimated Available Convenience Expenditure
to Support Additional Retail Floorspace to 2021
2012 prices

		£m	%
Estimated Convenience Expenditure 2012		176.95	
Less Leakage		35.51	20.1%
Plus Inflow		47.01	26.6%
Net Aavailable Convenience Expenditure 2012		188.45	
Estimated Turnover of Convenience Floorspace 2012		188.45	
Estimated Notional Turnover of Convenience Floorspace 2012		149.66	
Estimated Surplus Convenience Expenditure 2012		**38.78**	
Estimated Convenience Expenditure 2017		205.07	
Less leakage	20.1%	41.16	
Plus Inflow	26.6%	54.48	
Net Aavailable Convenience Expenditure 2017		218.40	
Estimated Notional Turnover of Convenience Floorspace		149.66	
Estimated Notional Turnover of Convenience Commitments (Table 47)		46.53	
Estimated Total Notional Turnover of Convenience Floorspace 2017		196.19	
Estimated Surplus Convenience Expenditure 2017		**22.21**	
Estimated Convenience Expenditure 2021		220.82	
Less leakage	20.1%	44.32	
Plus Inflow	26.6%	58.67	
Net Aavailable Convenience Expenditure 2021		235.17	
Estimated Total Notional Turnover of Convenience Floorspace 2021		196.19	
Estimated Surplus Convenience Expenditure 2021		**38.98**	

Table 49
Estimated Available Comparison Expenditure
to Support Additional Retail Floorspace to 2021
2012 prices

		£m	%
Estimated Comparison Expenditure 2012		261.67	
Less Leakage		160.87	61.5%
Plus Inflow		110.22	42.1%
Net Aavailable Comparison Expenditure 2012		211.02	
Estimated Turnover of Comparison Floorspace 2012		211.02	
Estimated Notional Turnover of Convenience Floorspace 2012		172.28	
Estimated Surplus Expenditure 2012		**38.74**	
Estimated Comparison Expenditure 2017		369.90	
Less leakage	61.5%	227.41	
Plus Inflow	42.1%	155.81	
Net Aavailable Comparison Expenditure 2017		298.30	
Estimated Notional Turnover of Comparison Floorspace 2012		172.28	
Estimated Notional Turnover of Comparison Floorspace 2017 #		185.59	
Estimated Notional Turnover of Comparison Commitments 2012 (Table 47)		52.49	
Estimated Notional Turnover of Comparison Commitments 2017 #		56.55	
Estimated Total Notional Turnover of Comparison Floorspace 2017		242.14	
Estimated Surplus Comparison Expenditure 2017		**56.17**	
Estimated Convenience Expenditure 2021		464.57	
Less leakage	61.5%	285.60	
Plus Inflow	42.1%	195.68	
Net Aavailable Comparison Expenditure 2021		374.65	
Estimated Total Notional Turnover of Comparison Floorspace 2021 #		257.00	
Estimated Surplus Comparison Expenditure 2021		**117.65**	

Note: # includes allowance for 1.5% increase per annum in turnover efficiency of existing and committed floorspace

Table 50
Potential Surplus Convenience Expenditure from Leakage Reduction
2012 prices

Available Convenience Expenditure 2012		£176.95 m
Leakage 2012 (Table 16)		£35.51 m
Leakage as % of total spend		20.1%
Available Convenience Expenditure 2021		£220.82 m
Leakage in 2021 if % rate remains unchanged		£44.32 m
Increase in leakage		£8.81 m
Leakage in 2021 if rate drops to	18%	£39.75 m
	16%	£35.33 m
	14%	£30.92 m
Expenditure Inflow in 2021 (Table 48)		£58.67 m
Total Available Expenditure in 2021 if leakage rate drops t	18%	£239.74 m
	16%	£244.16 m
	14%	£248.57 m
Notional Convenience Turnover 2021 (Table 48)		£196.19 m
Surplus Expenditure in 2021		
if leakage remains at	20.1%	£38.98 m
if leakage drops to	18%	£43.55 m
	16%	£47.96 m
	14%	£52.38 m
Scope for new main food convenience floorspace (gross sq m) (assumes turnover of £10,000 per square metre)		
if leakage remains at	20.1%	6,496 sq m
if leakage drops to	18%	7,258 sq m
	16%	7,994 sq m
	14%	8,730 sq m

Table 51
Potential Surplus Comparison Expenditure from Leakage Reduction
2012 prices

Available Comparison Expenditure 2012		£261.67 m
Leakage 2012 (Table 35)		£160.87 m
Leakage as % of total spend		61.5%
Available Comparison Expenditure 2021		£464.57 m
Leakage in 2021 if % rate remains unchanged		£285.60 m
Increase in leakage		£124.74 m
Leakage in 2021 if rate drops to	58%	£269.45 m
	55%	£255.51 m
	52%	£241.57 m
Expenditure Inflow in 2021 (Table 49)		£195.68 m
Total Available Expenditure in 2021 if leakage rate drops to	58%	£390.80 m
	55%	£404.74 m
	52%	£418.68 m
Notional Comparison Turnover 2021 (Table 49)		£257.00 m
Surplus Expenditure in 2021		
if leakage remains at	61.5%	£117.65 m
if leakage drops to	58%	£133.81 m
	55%	£147.74 m
	52%	£161.68 m
Scope for new comparison floorspace (gross square metres)		
Mainstream Comparison		
if leakage remains at	61.5%	39,216 sq m
if leakage drops to	58%	44,602 sq m
	55%	49,247 sq m
	52%	53,893 sq m
Bulky Goods		
if leakage remains at	61.5%	52,288 sq m
if leakage drops to	58%	59,469 sq m
	55%	65,663 sq m
	52%	71,857 sq m

Table 51a
Potential Surplus Comparison Expenditure from Leakage Reduction (Reduced Growth Rate)
2012 prices

Available Comparison Expenditure 2012		£261.67 m
Leakage 2012 (Table 35)		£160.87 m
Leakage as % of total spend		61.5%
Available Comparison Expenditure 2021		£400.19 m
Leakage in 2021 if % rate remains unchanged		£246.03 m
Increase in leakage		£85.16 m
Leakage in 2021 if rate drops to	58%	£232.11 m
	55%	£220.11 m
	52%	£208.10 m
Expenditure Inflow in 2021 (Table 49)		£168.57 m
Total Available Expenditure in 2021 if leakage rate drops to	58%	£336.65 m
	55%	£348.66 m
	52%	£360.66 m
Notional Comparison Turnover 2021 (Table 49)		£245.82 m
Surplus Expenditure in 2021		
if leakage remains at	61.5%	£76.91 m
if leakage drops to	58%	£90.83 m
	55%	£102.83 m
	52%	£114.84 m
Scope for new comparison floorspace (gross square metres)		
Mainstream Comparison		
if leakage remains at	61.5%	25,636 sq m
if leakage drops to	58%	30,276 sq m
	55%	34,278 sq m
	52%	38,280 sq m
Bulky Goods		
if leakage remains at	61.5%	34,182 sq m
if leakage drops to	58%	40,368 sq m
	55%	45,703 sq m
	52%	51,039 sq m

Table 52
Estimated Available Convenience Expenditure to Support Additional Retail Floorspace to 2021 by Midlothian Sub-Area
2012 prices

	A7/A68 corridor £m	A701 corridor £m	Shawfair area £m	Total Midlothian £m
Estimated Convenience Expenditure 2012 (Table 5a)	108.99	55.97	11.99	176.95
Less Leakage from Sub-Area (Table 44)	41.97	6.28	11.13	35.51
Percentage Leakage	*38.5%*	*11.2%*	*92.8%*	*20.1%*
Plus Inflow of Convenience Expenditure	14.43	56.27	0.18	47.01
Percentage Inflow	*13.2%*	*100.5%*	*1.5%*	*26.6%*
Net leakage / inflow	**-27.55**	**49.99**	**-10.95**	**11.50**
Net Available Convenience Expenditure 2012	81.44	105.96	1.04	188.45
Estimated Notional Turnover of Convenience Floorspace 2012 (Table 46)	47.02	101.96	0.68	149.66
Estimated Surplus Convenience Expenditure 2012	**34.42**	**4.00**	**0.36**	**38.78**
Estimated Convenience Expenditure 2017	127.31	63.23	14.53	205.07
Less leakage (at 2012 percentage level)				41.16
Plus Inflow (at 2012 percentage level)				54.48
Net leakage / inflow	**-32.92**	**59.57**	**-13.32**	**13.33**
Net Available Convenience Expenditure 2017	94.39	122.80	1.21	218.40
Estimated Notional Turnover of Convenience Floorspace 2017 (Table 48)	47.02	101.96	0.68	149.66
Estimated Notional Turnover of Convenience Commitments (Table 47)	32.30	14.23	0.00	46.53
Estimated Total Notional Turnover of Convenience Floorspace 2017	79.32	116.19	0.68	196.19
Estimated Surplus Convenience Expenditure 2017	**15.06**	**6.62**	**0.53**	**22.21**
Estimated Convenience Expenditure 2021	136.20	66.92	17.70	220.82
Less leakage (at 2012 percentage level)				44.32
Plus Inflow (at 2012 percentage level)				58.67
Net leakage / inflow	**-34.56**	**65.31**	**-16.40**	**14.35**
Net Aavailable Convenience Expenditure 2021	101.63	132.23	1.30	235.17
Estimated Total Notional Turnover of Convenience Floorspace 2021	79.32	116.19	0.68	196.19
Estimated Surplus Convenience Expenditure 2021	**22.31**	**16.05**	**0.62**	**38.98**
Percentage Surplus by Sub-Area, 2021	57.2%	41.2%	1.6%	100.0%

Table 53
Estimated Available Comparison Expenditure to Support Additional Retail Floorspace to 2021 by Midlothian Sub-Area
2012 prices

	A7/A68 corridor £m	A701 corridor £m	Shawfair area £m	Total Midlothian £m
Estimated Comparison Expenditure 2012 (Table 6a)	161.17	82.76	17.74	261.67
Less Leakage from Sub-Area (Table 44)	137.37	42.95	17.70	160.87
Percentage Leakage	*85.2%*	*51.9%*	*99.8%*	*61.5%*
Plus Inflow of Comparison Expenditure	7.32	140.06	0.00	110.22
Percentage Inflow	*4.5%*	*169.2%*	*0.0%*	*42.1%*
Net leakage / inflow	**-130.05**	**97.11**	**-17.70**	**-50.65**
Net Available Comparison Expenditure 2012	31.12	179.87	0.03	211.02
Estimated Notional Turnover of Comparison Floorspace 2012 (Table 46)	23.34	148.89	0.04	172.28
Estimated Surplus Comparison Expenditure 2012	**28.35**	**126.09**	**0.03**	**154.47**
Estimated Comparison Expenditure 2017	229.63	114.06	26.21	369.90
Less leakage (at 2012 percentage level)				227.41
Plus Inflow (at 2012 percentage level)				155.81
Net leakage / inflow	**-185.64**	**140.21**	**-26.17**	**-71.60**
Net Available Comparison Expenditure 2017	43.99	254.27	0.05	298.30
Estimated Notional Turnover of Comparison Floorspace 2017 (Table 49)	25.14	160.40	0.05	185.59
Estimated Notional Turnover of Comparison Commitments (Table 47)	2.77	53.78	0.00	56.55
Estimated Total Notional Turnover of Comparison Floorspace 2017	27.91	214.18	0.05	242.14
Estimated Surplus Comparison Expenditure 2017	**16.08**	**40.09**	**0.00**	**56.17**
Estimated Comparison Expenditure 2021	286.53	140.79	37.24	464.57
Less leakage (at 2012 percentage level)				285.60
Plus Inflow (at 2012 percentage level)				195.68
Net leakage / inflow	**-231.29**	**178.55**	**-37.18**	**-89.92**
Net Available Comparison Expenditure 2021	55.25	319.34	0.06	374.65
Estimated Total Notional Turnover of Comparison Floorspace 2021	29.62	227.32	0.05	257.00
Estimated Surplus Comparison Expenditure 2021	**25.62**	**92.02**	**0.01**	**117.65**
Percentage Surplus by Sub-Area, 2021	21.8%	78.2%	0.0%	100.0%

Table 53a
Estimated Available Comparison Expenditure to Support Additional Retail Floorspace to 2021 by Midlothian Sub-Area (Reduced Growth Rate)
2012 prices

	A7/A68 corridor £m	A701 corridor £m	Shawfair area £m	Total Midlothian £m
Estimated Comparison Expenditure 2012 (Table 6a)	161.17	82.76	17.74	261.67
Less Leakage from Sub-Area (Table 44)	137.37	42.95	17.70	160.87
Percentage Leakage	*85.2%*	*51.9%*	*99.8%*	*61.5%*
Plus Inflow of Comparison Expenditure	7.32	140.06	0.00	110.22
Percentage Inflow	*4.5%*	*169.2%*	*0.0%*	*42.1%*
Net leakage / inflow	**-130.05**	**97.11**	**-17.70**	**-50.65**
Net Available Comparison Expenditure 2012	31.12	179.87	0.03	211.02
Estimated Notional Turnover of Comparison Floorspace 2012 (Table 46)	23.34	148.89	0.04	172.28
Estimated Surplus Comparison Expenditure 2012	**28.42**	**127.40**	**0.03**	**155.85**
Estimated Comparison Expenditure 2017	206.85	102.74	23.61	333.21
Less leakage (at 2012 percentage level)				204.85
Plus Inflow (at 2012 percentage level)				140.35
Net leakage / inflow	**-167.23**	**126.31**	**-23.57**	**-64.50**
Net Available Comparison Expenditure 2017	39.63	229.05	0.04	268.71
Estimated Notional Turnover of Comparison Floorspace 2017 (Table 49)	24.53	156.49	0.05	181.06
Estimated Notional Turnover of Comparison Commitments (Table 47)	2.70	52.47	0.00	55.17
Estimated Total Notional Turnover of Comparison Floorspace 2017	27.23	208.96	0.05	236.23
Estimated Surplus Comparison Expenditure 2017	**12.40**	**20.09**	**0.00**	**32.48**
Estimated Comparison Expenditure 2021	246.83	121.28	32.08	400.19
Less leakage (at 2012 percentage level)				246.03
Plus Inflow (at 2012 percentage level)				168.57
Net leakage / inflow	**-199.24**	**153.81**	**-32.03**	**-77.46**
Net Available Comparison Expenditure 2021	47.59	275.09	0.05	322.73
Estimated Total Notional Turnover of Comparison Floorspace 2021	28.33	217.44	0.05	245.82
Estimated Surplus Comparison Expenditure 2021	**19.26**	**57.65**	**0.00**	**76.91**
Percentage Surplus by Sub-Area, 2021	25.0%	75.0%	0.0%	100.0%

Table 54
Estimated Available Convenience Expenditure to Support Additional Retail Floorspace to 2021 by Midlothian Sub-Area, excluding flows between Sub-Areas
2012 prices

	A7/A68 corridor £m	A701 corridor £m	Shawfair area £m	Total Midlothian £m
Estimated Convenience Expenditure 2012 (Table 5a)	108.99	55.97	11.99	176.95
Less Leakage from Sub-Area (Table 44)	25.01	4.90	5.60	35.51
Percentage Leakage	*23.0%*	*8.8%*	*46.7%*	*20.1%*
Inflow from outer catchment and Borders (Table 16)	8.34	27.73	0.18	36.24
Estimated additional inflow to Costco (Table 42)	0.00	10.77	0.00	10.77
Total Inflow of convenience expenditure	8.34	38.50	0.18	47.01
Percentage Inflow	*7.6%*	*68.8%*	*1.5%*	*26.6%*
Net leakage / inflow	**-16.68**	**33.59**	**-5.42**	**11.50**
Net Available Convenience Expenditure 2012	92.31	89.56	6.58	188.45
Estimated Notional Turnover of Convenience Floorspace 2012 (Table 46)	47.02	101.96	0.68	149.66
Estimated Surplus Convenience Expenditure 2012	**45.29**	**-12.40**	**5.89**	**38.78**
Estimated Convenience Expenditure 2017	127.31	63.23	14.53	205.07
Less leakage (at 2012 percentage level)				41.16
Plus Inflow (at 2012 percentage level)				54.48
Net leakage / inflow	**-20.33**	**40.56**	**-6.91**	**13.33**
Net Available Convenience Expenditure 2017	106.98	103.80	7.62	218.40
Estimated Notional Turnover of Convenience Floorspace 2017 (Table 48)	47.02	101.96	0.68	149.66
Estimated Notional Turnover of Convenience Commitments (Table 47)	32.30	14.23	0.00	46.53
Estimated Total Notional Turnover of Convenience Floorspace 2017	79.32	116.19	0.68	196.19
Estimated Surplus Convenience Expenditure 2017	**27.66**	**-12.39**	**6.94**	**22.21**
Estimated Convenience Expenditure 2021	136.20	66.92	17.70	220.82
Less leakage (at 2012 percentage level)				44.32
Plus Inflow (at 2012 percentage level)				58.67
Net leakage / inflow	**-21.00**	**44.84**	**-9.50**	**14.35**
Net Aavailable Convenience Expenditure 2021	115.20	111.77	8.21	235.17
Estimated Total Notional Turnover of Convenience Floorspace 2021	79.32	116.19	0.68	196.19
Estimated Surplus Convenience Expenditure 2021	**35.88**	**-4.42**	**7.52**	**38.98**
Percentage Surplus by Sub-Area, 2021	92.0%	-11.3%	19.3%	100.0%

Table 55
Estimated Available Comparison Expenditure to Support Additional Retail Floorspace to 2021 by Midlothian Sub-Area, excluding flows between Sub-Areas
2012 prices

	A7/A68 corridor £m	A701 corridor £m	Shawfair area £m	Total Midlothian £m
Estimated Comparison Expenditure 2012 (Table 6a)	161.17	82.76	17.74	261.67
Less Leakage from Sub-Area (Table 44)	107.76	40.55	12.57	160.87
Percentage Leakage	*66.9%*	*49.0%*	*70.8%*	*61.5%*
Inflow from outer catchment and Borders (Table 35)	2.32	59.29	0.00	61.61
Estimated additional inflow to Costco / IKEA (Table 42)	0.00	48.62	0.00	48.62
Total Inflow of comparison expenditure	2.32	107.90	0.00	110.22
Percentage Inflow	*1.4%*	*130.4%*	*0.0%*	*42.1%*
Net leakage / inflow	**-105.44**	**67.36**	**-12.57**	**-50.65**
Net Available Comparison Expenditure 2012	55.73	150.12	5.17	211.02
Estimated Notional Turnover of Comparison Floorspace 2012 (Table 46)	23.34	148.89	0.04	172.28
Estimated Surplus Comparison Expenditure 2012	**32.39**	**1.23**	**5.13**	**38.74**
Estimated Comparison Expenditure 2017	229.63	114.06	26.21	369.90
Less leakage (at 2012 percentage level)				227.41
Plus Inflow (at 2012 percentage level)				155.81
Net leakage / inflow	**-150.85**	**98.16**	**-18.90**	**-71.60**
Net Available Comparison Expenditure 2017	78.78	212.21	7.31	298.30
Estimated Notional Turnover of Comparison Floorspace 2017 (Table 49)	25.14	160.40	0.05	185.59
Estimated Notional Turnover of Comparison Commitments (Table 47)	2.77	53.78	0.00	56.55
Estimated Total Notional Turnover of Comparison Floorspace 2017	27.91	214.18	0.05	242.14
Estimated Surplus Comparison Expenditure 2017	**50.87**	**-1.97**	**7.26**	**56.17**
Estimated Comparison Expenditure 2021	286.53	140.79	37.24	464.57
Less leakage (at 2012 percentage level)				285.60
Plus Inflow (at 2012 percentage level)				195.68
Net leakage / inflow	**-187.59**	**125.73**	**-28.06**	**-89.92**
Net Available Comparison Expenditure 2021	98.94	266.52	9.18	374.65
Estimated Total Notional Turnover of Comparison Floorspace 2021	29.62	227.32	0.05	257.00
Estimated Surplus Comparison Expenditure 2021	**69.32**	**39.20**	**9.13**	**117.65**
Percentage Surplus by Sub-Area, 2021	58.9%	33.3%	7.8%	100.0%

Table 55a
Estimated Available Comparison Expenditure to Support Additional Retail Floorspace to 2021 by Midlothian Sub-Area, excluding flows between Sub-Areas (Reduced Growth Rate)
2012 prices

	A7/A68 corridor £m	A701 corridor £m	Shawfair area £m	Total Midlothian £m
Estimated Comparison Expenditure 2012 (Table 6a)	161.17	82.76	17.74	261.67
Less Leakage from Sub-Area (Table 44)	107.76	40.55	12.57	160.87
Percentage Leakage	*66.9%*	*49.0%*	*70.8%*	*61.5%*
Inflow from outer catchment and Borders (Table 35)	2.32	59.29	0.00	61.61
Estimated additional inflow to Costco / IKEA (Table 42)	0.00	48.62	0.00	48.62
Total Inflow of comparison expenditure	2.32	107.90	0.00	110.22
Percentage Inflow	*1.4%*	*130.4%*	*0.0%*	*42.1%*
Net leakage / inflow	**-105.44**	**67.36**	**-12.57**	**-50.65**
Net Available Comparison Expenditure 2012	55.73	150.12	5.17	211.02
Estimated Notional Turnover of Comparison Floorspace 2012 (Table 46)	23.34	148.89	0.04	172.28
Estimated Surplus Comparison Expenditure 2012	**32.39**	**1.23**	**5.13**	**38.74**
Estimated Comparison Expenditure 2017	206.85	102.74	23.61	333.21
Less leakage (at 2012 percentage level)				204.85
Plus Inflow (at 2012 percentage level)				140.35
Net leakage / inflow	**-135.89**	**88.42**	**-17.03**	**-64.50**
Net Available Comparison Expenditure 2017	70.97	191.16	6.59	268.71
Estimated Notional Turnover of Comparison Floorspace 2017 (Table 49)	24.53	156.49	0.05	181.06
Estimated Notional Turnover of Comparison Commitments (Table 47)	2.70	52.47	0.00	55.17
Estimated Total Notional Turnover of Comparison Floorspace 2017	27.23	208.96	0.05	236.23
Estimated Surplus Comparison Expenditure 2017	**43.74**	**-17.79**	**6.54**	**32.48**
Estimated Comparison Expenditure 2021	246.83	121.28	32.08	400.19
Less leakage (at 2012 percentage level)				246.03
Plus Inflow (at 2012 percentage level)				168.57
Net leakage / inflow	**-161.60**	**108.31**	**-24.17**	**-77.46**
Net Available Comparison Expenditure 2021	85.23	229.59	7.91	322.73
Estimated Total Notional Turnover of Comparison Floorspace 2021	28.33	217.44	0.05	245.82
Estimated Surplus Comparison Expenditure 2021	**56.90**	**12.15**	**7.86**	**76.91**
Percentage Surplus by Sub-Area, 2021	74.0%	15.8%	10.2%	100.0%

Correction Sheet for Appendix 3, Midlothian Retail Study, 2012

Page 24, para 4.8, 3^{rd} sentence, reference to £211 is reference to £211 *million*

Page 28, para 4.30, 2^{nd} sentence, reference to 8,700 should be suffixed *square metres* www.midlothian.gov.uk/MLDP

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Körler icin kabartma yazilar, kaset ve büyük nüshalar da dahil olmak üzere, istenilen bilgileri saglamak ve tercüme etmekten memnuniyet duyariz.

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