strategic**perspectives**

Warwick District Council
Retail & Leisure Study Update 2014 (April 2014)

Warwick District Council: Retail & Leisure Study Update 2014

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*Please note that the full survey results have been published in a separate volume and can be obtained directly from the local planning authority.

1.0 INTRODUCTION

1.1 Strategic Perspectives (SP) was commissioned by Warwick District Council in 2012 to update the *2009 Retail and Leisure Study* (RLS).

1.2 The first stages of the commission involved an initial "*refresh*" of the 2009 RLS and an appraisal of the Clarendon Arcade retail scheme from a planning and commercial perspective. These two separate studies were published in 2013. This final report provides a comprehensive update of the 2009 RLS and the retail capacity *"refresh"* (Stage 1 report) based on a new telephone interview survey of 1,000 households conducted in July 2013[1]. The findings of the 2009 RLS and the 2013 *Retail Study Refresh* will be superseded by this update.

1.3 This report will help to inform both plan-making and decision-taking in Warwick District over the development plan period, up to 2029. Specifically it will provide the Council with the robust evidence base needed to identify and respond to the significant challenges facing the District and its main centres over the development plan period. The study will also inform the assessment and identification of potential opportunity sites to meet any identified need for new retail and leisure uses.

1.4 This study has been prepared in the context of current and emerging national and development plan policy guidance. It specifically takes into account the advice set out in the *National Planning Policy Framework* (NPPF), published in March 2012, as well as other key material considerations, including the *National Planning Practice Guidance* (NPPG) which was published online in March 2014 at the time of finalising this report. The NPPG has replaced and significantly streamlined the previous PPS4 *Practice Guidance on Need, Impact and the Sequential Approach* (the '*Practice Guidance*'). Notwithstanding this it still places significant weight on the development of positive plan-led visions and strategies for town centres, and retains the key sequential and 'impact tests'. Its publication has not changed the 'town centres first' policy and has not therefore had any material impact on this evidence-based study update.

1.5 For ease of reference this study is structured as follows:

- **Section 2** reviews the national, regional and local planning policy context material to retail, leisure and town centre matters.
- **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail and leisure sectors, and how they have shaped (and are likely to shape) the UK's urban and retail landscape over the next 15 years.
- **Section 4** provides an overview of the current retail provision in Warwick District (town centre and out-of-centre) and describes the results of the

[1] It was agreed with the local planning authority that the updated household survey should not be carried out until the new out-of-centre Morrisons superstore had opened on the former Foundry site. This is why a survey was not carried out as part of the "refresh" study, which relied on the results of the previous survey conducted for the 2009 RLS.

household telephone interview survey conducted in July 2013 by the market research company, *RMG: Clarity*. The survey results help to identify shopping and leisure patterns and preferences in the defined study area, which provides an important input to the quantitative and qualitative analysis.

- **Sections 5-7** set out the updated *t*own centre health check assessments for Royal Leamington Spa, Warwick and Kenilworth Town Centres based on the most up-to-date research and evidence. Where possible the 2013 health check findings have been compared with the results of the 2009 RLS to help identify any significant changes in each centre's overall role, attraction and performance.
- **Section 8** describes the results of the economic capacity assessment for new retail (convenience and comparison goods) based on the latest population and expenditure data, and informed by the survey-derived market share analysis.
- **Section 9** provides an overview of current leisure provision and usage in Warwick District and its main centres, and identifies any significant 'gaps' in provision that need to be addressed through new investment over the development plan period.
- Finally, **Section 10** draws together the study findings and sets out the main conclusions and recommendations.

1.6 It is important to state at the outset that this report has been prepared in the knowledge of the emerging plans for the Clarendon Arcade scheme on the Chandos Street site in Royal Leamington Spa Town Centre. This scheme is being progressed jointly by the local planning authority in partnership with Wilson Bowden Developments Limited. A planning application for new retail and leisure floorspace is scheduled for Spring 2014, although the scheme had not been 'fixed' at the time this study was prepared.

1.7 Finally it should be noted that the quantitative capacity forecasts identified by this study should be interpreted with caution, as they can become increasingly open to margins of error over time. We therefore advise the Council that the forecasts should be constantly monitored and updated to take into account any significant changes in retail expenditure and population growth forecasts over time, as well as any potential impacts arising from other key trends in the retail sector (such as, for example, the growth in internet shopping).

2.0 PLANNING POLICY CONTEXT

2.1 This section provides a brief overview of the national and local development plan planning policy context material to the consideration and assessment of town centres and retailing in the District and its main centres. A more detailed review is set out in **Appendix 1** to this study.

NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

2.2 The NPPF was published in March 2012 and sets out the planning policies for England and how these are expected to be applied. It reinforces the importance of up-to-date plans and strengthens local decision making. At the heart of the NPPF is a **presumption in favour of sustainable development**[2], which is seen as *"a golden thread running through both plan-making and decision-taking"* (paragraph 14). For plan-making the Framework states that local planning authorities should positively seek opportunities to meet the development needs of their area

2.3 The NPPF states that LPAs should ensure that the Local Plan is based on *"…adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area"* (paragraph 158). LPAs should use this evidence base to, amongst other requirements, assess the needs for land or floorspace for economic development, including for retail and leisure development; examine the role and function of town centres and the relationship between them; assess the capacity of existing centres to accommodate new town centre development; and identify locations of deprivation which may benefit from planned remedial action.

2.4 The Framework (paragraphs 18-149) sets out 13 key 'principles' for **delivering sustainable development**, including building a strong, competitive economy and ensuring the vitality of town centres. The NPPF (paragraph 23) states that planning policies should be positive and promote competitive town centre[3] environments, as well as setting out policies for the management and growth of centres over the plan period.

2.5 When assessing and determining applications for main town centre uses[4] that are not in an existing centre and not in accordance with an up-to-date Local Plan, the Framework requires that LPAs should require a **sequential test**[5] and an **impact**

[2] Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs.

[3] The NPPF (Annex 2) states that references to town centres or centres apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

[4] NPPF (Annex 2) defines 'main town centre uses' as retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

[5] This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

assessment[6]. Where an application fails to satisfy the sequential test or is likely to have a "*significant adverse impact*", it should be refused (paragraph 27).

DEVELOPMENT PLAN

2.6 The development plan for Warwick District Council comprises the '*saved*' policies of the adopted Local Plan (2007), incorporating the adopted Proposals Map, along with a raft of Supplementary Planning Documents. The Warwickshire Structure Plan (2001) has been entirely superseded by the Local Plan (2007).

2.7 The adopted **Local Plan** (Chapter 6) sets out the Council's policies on development within defined Urban Areas. 'Saved' Policies UAP3, UAP4 and UAP5 are material to the assessment of new retail proposals and floorspace. Chapter 7 sets out the development policies applicable to the defined Town Centres of Royal Leamington Spa, Warwick and Kenilworth. All the '*saved*' policies in this chapter are relevant, in particular policies TCP1 – 10. Policy TCP2 specifically directs new retail development towards the retail areas of Royal Leamington Spa, Warwick and Kenilworth, as defined in the Proposals Map. Policy TCP7 identifies a number of opportunity sites in Royal Leamington Spa for regeneration, including the Station Area, Wise Street Area, Court Street Area and Royal Leamington Spa Cultural Quarter.

2.8 The Council are currently preparing the **New Local Plan** for Warwick District to guide development over the next 18 years and there is an expectation that it will be adopted during 2015. The Preferred Options document published for consultation in June/August 2012 explores the options to be considered relating to all development matters, including town centre and retail development. Chapters 4 ('Spatial Portrait, Issues and Objectives') and 9 ('*Retailing and Town Centres*') discuss policy objectives which specifically relate to retail and leisure development. The New Local Plan will identify the function of the three Town Centres and manage their future growth to ensure a successful and sustainable level of retail and leisure growth. Chapter 9 reinforces the objectives of the 2007 Local Plan in respect of the settlement hierarchy and identifies Royal Leamington Spa as the largest Town Centre with a sub-regional role; Warwick Town Centre fulfilling a dual role for local shopping and tourism; and Kenilworth having a diverse role, but primarily functioning as an important food retail destination. **Preferred Option 9** ('*Retailing & Town Centres*') establishes the Council's preferred approach for developing retail policies. The *Preferred Options* document also states that new retail development centred on Chandos Street would have the potential to meet the need for new retailing in the heart of Leamington town centre.

2.9 The **Warwick Town Centre Plan** is currently being prepared by Warwick District Council in partnership with Warwickshire County Council, Warwick Town Council,

[6] An impact assessment is required if the development is over a proportionate, locally set floorspace threshold. If there is no locally set threshold, the default threshold is 2,500m^2.

Warwick Chamber of Trade and the Warwick Society. The Town Centre Plan forms part of the Local Development Framework and will guide the determination of planning applications for new development and inform other strategies for the Town Centre. The Plan includes a 'vision' for Warwick Town Centre and sets out how the issues identified can be addressed. These considerations are set out in the Preferred Options paper which reflects the responses received during a public consultation that ran between October and December 2012. The Preferred Options identifies 30 Opportunity Sites that could act as a catalyst for general improvement to the streetscape and the appearance of the Town Centre for the benefit of residents and tourist alike.

SUMMARY

2.10 This section has provided an overview of the national and local planning policy context material to plan-making and the determination of new retail and town centre uses. A more detailed review is set out in Appendix 1 to this study.

2.11 In summary, the underlying objective of policy at all levels is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development in town centre locations *"first"* in accordance with the sequential approach.

2.12 The NPPF and the Council's development plan provide an important context for this Retail & Leisure Study Update 2014.

3.0 RETAIL & LEISURE TRENDS OVERVIEW

3.1 Britain's urban landscape has altered dramatically since the 1980s. The changes in the location of new retail and leisure development and the dynamic shifts in the nation's shopping and leisure habits have largely been shaped by the complex interaction of policy, economic, social, consumer lifestyle and investment trends. In turn, these trends have had a significant impact on the current and future role of centres, which need to be taken into account when considering future needs, identifying sites and strategies, and assessing the impact of new development.

3.2 This section summarises some of the key trends that have driven change in the retail sector over the last three decades, and will continue to shape change in the future.

ECONOMIC TRENDS & CONSUMER SPENDING

3.3 Following an unprecedented period of growth in consumer spending since the mid-1990s, the onset of the economic recession in 2007/08 had a dramatic impact on consumer spending and market demand. The table below sets out the latest research on actual and forecast expenditure per capita growth rates for the main categories of retail spending between 2005 and 2030 prepared by Experian Business Strategies (EBS). These forecasts help to inform retail capacity and impact assessments.

Table 3.1 **Growth in UK Retail Spend per Head (% change), 2008 - 2030**

Volume Growth per head (%):	ACTUAL GROWTH--------------------------:					FORECAST GROWTH------------:			
	2008	2009	2010	2011	2012	2013	2014	2015	2016-2030
Total Retail Spend	1.1	-3.2	1.0	-0.7	1.7	1.8	1.4	1.9	2.3
Convenience Goods:	-3.5	-4.1	-0.4	-2.3	-0.6	-0.6	-0.3	0.1	0.8
Comparison Goods:	3.3	-3.0	1.9	0.3	3.1	3.2	2.3	2.8	3.0

Source: Experian Retail Planner Briefing Note 11 (October 2013) Figures 1a and 1b.

3.4 As the table show, there has been limited growth in retail (convenience and comparison goods) expenditure per head since 2008. Although there have been positive signs of improvement in the economy during 2013, the retail sector remains fragile. Analysts forecast that the retailing will continue to struggle over the short to medium term. Business and consumer confidence has been further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices). This has effectively reduced disposable income and retailers' margins are being squeezed further as the downturn persists.

3.5 Against this uncertain economic background, EBS forecast that annual retail spend growth rates will be lower than previous historic trends over the medium to longer term. As the table shows, EBS forecast average comparison goods retail spending growth of +3.0% per annum for the period 2016-2030, which is significantly lower than growth rates based on past trends of around +5.2% (the average annual growth for the period 1982-2012).

Retail Development

3.6 The retail development pipeline has also slowed dramatically during the economic downturn compared with the shopping centre *"boom"* experienced in the ten year period up to 2007. One of the key impacts has been to *"weed out"* some of the more expensive and unviable development schemes that were in the pipeline before the economic downturn.

3.7 The *'2013 Shopping Centre Development Pipeline'* Research Report by the British Council of Shopping Centres (BCSC) confirms that the quantum of completed new shopping centre floorspace in the UK is currently at its lowest level since the 1990s. Following the development of circa 260,000m^2 in 2009, 232,000m^2 in 2010 and 280,000m^2 in 2011, no new floorspace opened in 2012.

3.8 Notwithstanding this, the BCSC research also indicates that 2013 is showing the first significant signs of new activity, with circa 140,000m^2 of new floorspace opening (including Trinity Leeds). There are also a number of major schemes scheduled for 2014 and 2015, of which the most significant are Grand Central in Birmingham and Old Market in Hereford.

3.9 Given that it takes on average over ten years for a town centre scheme to be planned and developed, and can take even longer to deliver more complicated sites, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Furthermore, the more challenging retail environment means that those (mainly non-prime) shopping locations that missed the previous pre-recession development cycle may face a long wait for new town centre development, or require a new approach if they are to secure new shopping centre development. Even then, the scale and type of new retail investment that will emerge in the post-recessionary period could be very different to the last "*golden decade*" of shopping centre development between 1997 and 2007.

Retailer Demand

3.10 Retailers have also had to adapt their business strategies and store formats to changes in customer requirements, planning legislation, the economic downturn and the growth in internet shopping. In general terms those retailers with strong brands and loyal customers, trading from the right stores in the right locations, and with a good online facility have managed to weather the economic storm.

3.11 In particular, the changes in the grocery sector over the last decade illustrate the dynamic changes in the retail sector. Some of the key trends include:

- The move by all the major national grocery retailers into the smaller convenience store sector in order to increase market share further. For example, Tesco now has over 1,500 'Express' format stores, Sainsbury's has developed its 'Local' format nationally and Waitrose are testing the 'Little Waitrose' format within the M25. Asda's purchase of Netto has also allowed it to operate from smaller convenience store formats.
- The growth of European 'deep discount' food operators (such as Aldi and Lidl) has also continued during the economic downturn. In response to this competition, the established grocery retailers have expanded their own-range 'value' products and promoted significant 'price discount' campaigns.
- An increase in the non-food sale areas of larger superstores over the last decade, including the development of own-label clothing. In some of the stores operated by Tesco (i.e. the 'Extra' format) and Asda, for example, a significant proportion of sales area (over 50%) is often set aside for non-food retailing.
- The 'race for more space' and new store openings over the last decade has also resulted in extensions to existing stores and/or new mezzanine space, and the growth of online shopping (see below).

3.12 However, the economic downturn has resulted in some of the main food operators reviewing and revising their established business models over the last 12-18 months. There are signs that those operators that have largely driven new store openings and expansion over the last 20 years (principally Tesco and Sainsbury's) are now focussing on increasing market share and profitability through the growth of smaller convenience store formats and online sales. As a result it is anticipated that there will be a slowdown in applications for major new food superstores compared with previous levels.

3.13 In the non-food sector, those retailers that experienced significant growth up to 2007 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high end and value retailing, have largely struggled to maintain market share over recent years. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have gone into administration and been forced to reduce their representation in centres across the UK (e.g. HMV, Blockbusters, etc.).

3.14 The 'bulky goods' retail warehouse sector has not been immune to the impact of the economic downturn. It has experienced a period of significant change and, more recently, instability. For example, during the late 1990s both B&Q ('Warehouse') and Homebase were rolling out very large out-of-centre retail warehouses (some exceeding

10,000m^2 gross) in an attempt to dominate market share. However, these same operators are now looking to close or scale down their under-performing stores in certain areas. Other 'bulky goods' operators have failed to remain viable in the economic climate (for example, Focus DIY).

3.15 Within town centres, some high street multiple operators are also changing their formats and requirements. Some traditional high street retailers (e.g. Boots, Next, Mothercare, TK Maxx and Marks & Spencer) are also actively looking for space in larger out-of-centre stores, either to accommodate new retail formats or to provide the larger floorplates they need to display their full range of products. These changes in retail development and market demand are clearly impacting on the UK's town centres and high streets.

3.16 Research also shows that there is an increasing polarisation of development activity and investment interest in the larger regional and sub-regional centres (i.e. the *'top 100'* centres). This is because they have larger and established catchment areas and represent less *'risky'* investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

3.17 In this context the latest 2013-14 Javelin VenueScore[7] ranks Royal Leamington Spa outside the UK's top 100 shopping locations at 105 In comparison, Coventry s ranked 58th and Birmingham is ranked 3rd. Since 2010, Royal Leamington Spa has fallen 22 places in the VenueScore ranking. This fall is most likely explained by the lack of recent investment in the town centre and the loss of certain retailers from the high street due to the impact of the economic downturn. This is discussed in more detail in **Section 4**.

INTERNET SHOPPING

3.18 New forms of retailing have also emerged in recent years and are becoming established as significant alternatives to more traditional 'bricks and mortar' shopping facilities.

3.19 Internet and multi-channel shopping has increased its market share of retail sales in certain product categories due to the increased use of personal computers, mobile phones and faster Broadband access. Up to now, the impact of Internet shopping has

7 The Javelin VenueScore is widely used as a key indicator to help inform the assessment of the changing attraction and performance of different shopping locations from year-to-year. VenueScore ranks the UK's town centres using a range of key performance indicators and includes a weighted allowance for the type of retail operators in any centre, reflecting their impact on shopping patterns.

been mainly concentrated on certain retail products and services (such as, for example, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products on the high street (the most recent examples being HMV and Blockbusters). This national trend is confirmed by the results of the recent household survey conducted in July 2013 which identifies how and where people currently shop for different types of comparison goods purchases. The table below summarises the responses for internet and mail order shopping.

Table 3.2 **Internet and Mail Order Shopping in Warwick District**

	INTERNET	MAIL ORDER
Clothing and footwear	4.0%	2.8%
DIY goods, hardware, decorating supplies, gardening products, etc.	1.5%	0.4%
Furniture, carpets, floor coverings, textiles, etc.	4.2%	0.7%
Large domestic electrical appliances	16.6%	0.2%
Small domestic electrical appliances	10.7%	0.4%
Recording media (CDs, DVDs, etc.)	35.7%	0.2%
Audio visual, photographic & computer items	19.2%	0.5%
Games, toys, hobbies, sporting goods, etc.	18.7%	1.9%
Pets and pet related products	3.8%	0.8%
Books and stationery	21.2%	0.5%
All other comparison goods	2.5%	0.9%

Source: Household telephone interview survey (July 2013). Excludes non responses. See Section 4.

3.20 Although forecasters are still uncertain as to the future growth of internet shopping, there does appear to be significant potential for increased market share over time. For example, the latest forecasts by Experian in *Retail Planner Briefing Note 11* (October 2013) indicate a growth in the market share of total non-store retail sales from 12.3% in 2013 to 20.3% by 2026.

3.21 However such forecasts need to be treated with caution as Experian forecast that approximately 25% of all Special Forms of Trading (SFT) sales for comparison goods and some 70% for convenience goods occur through traditional ("*bricks-and-mortar*") retail space. In other words, the majority of purchases that are currently made online via computers, smart phones, tablets, etc., are sourced from existing stores on the high street or out-of-centre superstores.

3.22 Over time it is likely that the main foodstore operators will increase the number of (Class B8) distribution warehouses to directly source online food and non-food shopping (for example, Tesco has recently opened a modern 'dotcom' warehouse in Erith). At this early stage in development it is our judgement that the main impact of the growth in 'dotcom' warehouses will be *'like-for-like'* on Internet sales currently sourced from existing stores, rather than resulting in a significant reduction in current main food shopping patterns and any marked increase in store closures. In turn this will help to 'free up space' in existing stores for different uses and activities. Furthermore, current research suggests that there will still be an appetite by operators to increase ('physical') store floorspace to cater for rising internet sales. In particular the forecast growth in 'click-and-collect' as a key driver of current and future internet growth will mean that retailers will still be looking for a physical presence in easily accessible locations, particularly centred around transport hubs.

3.23 The growth of internet shopping is also giving rise to the trend of 'showrooming' where customers view and test products in store, but complete purchases from online retailers; often via smart phones while in-store. With online shopping and price comparison 'apps' becoming more popular, this increases competition with '*bricks and mortar*' stores. In response, many retailers are building 'showrooms' into their retail model by price matching online competitors. For example, the development of Silvertown Quays in Newham will see the first development of '*brand pavilions'* where major comparison retailers can target online customers by showcasing products for online sales. This is a concept that could transfer to the high street and serve to embrace online retailing while at the same time maintaining footfall in town centres.

COMMERCIAL LEISURE TRENDS

3.24 Leisure uses make an increasingly important contribution to the vitality and viability of town centres and shopping centres, as they provide complementary uses that contribute to both the daytime, early evening and night-time economies.

3.25 Since the early 1990s the commercial leisure sector has experienced significant growth fuelled by buoyant market conditions, growing levels of disposable incomes and low unemployment. During the 1990s this growth mainly occurred in edge and out-of-centre leisure and retail parks, and was usually characterised by large multiplex cinemas and a range of other facilities (including tenpin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants and budget hotels). However, the tightening of planning policy has resulted in leisure facilities being integrated more into town centre mixed use developments.

3.26 Although the commercial leisure sector has not been immune from the impact of the economic downturn, the latest development trends indicate a move towards leisure-led schemes with multiplex cinemas as important anchors in their own right, along with related catering uses. This is illustrated by the Trinity Leeds scheme where the amount of space allocated to leisure, eating and drinking increased over time to almost one-quarter of the centre's total floorspace. Other leisure-led schemes include the proposed extensions/refurbishments of Centrale in Croydon and Silverburn in Glasgow by Hammerson, which comprise a new cinema and restaurants. The extension to The

Walnuts in Orpington also includes a mix of cinema, restaurants and retail, as do the proposals for new leisure-led schemes in Ealing and Hounslow town centres.

3.27 Other sub-sectors of the commercial leisure industry have performed relatively well over the last decade and have expanded rapidly across different locations. For example, the private health and fitness market has benefited recently from the emergence of new 'budget' operators. This new breed of clubs appeal to a wider market with reduced monthly subscriptions. Examples include The Gym Group, Anytime Fitness and EasyGym, which offer "no-frills" venues and "pay-as-you-go" (often 24-hour) entry.

3.28 **Section 9** provides a more detailed commentary on current trends in the commercial leisure sector as part of the assessment of leisure needs for the Borough.

TOWN CENTRE FUTURES

3.29 Although there are positive signs that the UK is finally beginning to emerge from the economic downturn, it is clear that the commercial property sector post-recession will be very different to the *"boom"* years of the last decade. Over the short to medium term at least the economy is forecast to experience a sustained period of lower growth in consumer spending, reduced bank lending, limited access to credit and cuts in public sector expenditure. This presents significant challenges for all those involved in the town centres development and investment.

3.30 The economic downturn and the growth of online shopping is also impacting on the vitality and viability of many of Britain's centres and high streets. This is placing pressures on rental growth and market demand in many centres, particularly secondary centres outside the *'top 100'* shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers. In our opinion, a far more uncertain future awaits the next "*wave*" of new retail investment and development. The evidence suggests that high quality schemes in the strongest prime shopping locations will continue to prosper. In contrast, the weaker secondary centres and shopping locations with a more limited offer, smaller catchments and negligible market demand will struggle to attract market interest and investment.

3.31 Notwithstanding the threat of online shopping, industry experts still predict that the demand from major retailers for new space will continue as it remains the primary mechanism for retailers to 'reach' their customers and grow their businesses. Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities), as there is limited new retail floorspace in the pipeline. With increased demand and the lack of supply over the short to medium term, research for the British Council of Shopping Centres (BCSC) predicts that this will effectively '*push up'* rental levels for the larger modern desirable units until a significant amount of new development reaches completion. As a result, over the medium term, retailers will be competing for limited available space. Therefore those centres that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. preferably prime shopping locations) and having the right size, format and specification to meet the needs of modern retailers.

3.32 Research by the BCSC has also identified an increased emphasis on asset management, as owners and developers invest in the expansion or refurbishment of existing shopping centres to increase their investment value and turnover. In the current economic climate this investment in existing assets is less risky and financially onerous than new build projects. However, as the supply of suitable units "dry up" in prime locations, so retailers will also look at alternative options for delivering growth, such as through new out-of-centre openings, increasing sales through the internet, and/or expanding internationally.

3.33 Finally, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, it is likely that applications for new and extended shopping facilities in out-of-centre locations will continue in the future. Potentially the next phase of out-of-centre investment and development could be a further reinvention and masterplanning of existing out-of-centre locations as mixed use developments, comprising residential, office and commercial leisure uses in addition to the existing and extended retail offer. The potential opportunities to *"reinvent"* out-of-centre shopping locations will be greatest initially where they are located close to towns that do not have the physical capacity (i.e. sequential sites) to increase their retail offer.

3.34 In this context, it is clear that the *'top 100'* prime centres and shopping locations in Britain should continue to flourish once the economy recovers. The greatest challenge will be how to revitalise the fortunes of struggling small and medium sized centres that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.

4.0 CURRENT RETAIL PROVISION & SHOPPING PATTERNS

4.1 The section provides an overview of retail provision and shopping patterns in Warwick District based on the results of the household telephone interview survey conducted in July 2013.

TOWN CENTRE RETAIL PROVISION

4.2 The table below provides a summary of the total retail ('footprint') floorspace in the District's main town centres based on the latest Experian Goad Category Reports[8] (see **Appendix 2**).

Table 4.1 **Town Centre Retail Floorspace (Gross m²)**

	Comparison	Convenience	TOTAL
Royal Leamington Spa	48,467	7,915	56,586
Warwick	9,838	6,735	16,573
Kenilworth	10,303	7,042	17,345

Source: Experian Goad Centre Category Reports (2012/13)

4.3 As the table shows **Royal Leamington Spa** has the greatest retail floorspace, commensurate with its role and function as the principal shopping and commercial centre in the District. The town's retail offer is distributed between the 'New Town' and 'Old Town' areas, although its main comparison goods offer is concentrated in the prime shopping areas focussed on and around The Parade. The Royal Prior Shopping Centre opened in 1987 and provides a focus for shopping activity. The smaller Regent Court opened in 2005 and has a more limited comparison goods offer. The key anchor retailers in the town centre include House of Fraser and Marks & Spencer. Apart from Tesco Metro, M&S and two small Co-Op stores, Royal Leamington Spa has a limited convenience goods offer and does not have an anchor foodstore.

4.4 **Warwick Town Centre's** retail offer is characterised by mainly smaller independent, specialist and antique stores. It has a limited number of national non-food multiples, principally Boots, WH Smith and Superdrug. The main foodstore in the town centre is the Sainsbury's supermarket (2,415m^2 net) at Saltisford, although it is defined as being 'edge-of-centre' in retail planning terms. Sainsbury's makes an important contribution to Warwick's overall food offer, and the evidence shows that it generates important linked trips to the town's other shops, services and businesses. Other smaller food and convenience stores in the town centre include M&S Simply Food at Westgate House (612m^2 net).

4.5 **Kenilworth** is similar in size to Warwick in terms of its retail ('footprint') floorspace. The town centre has recently benefited from the redevelopment of Talisman Square,

[8] The floorspace figures are derived from the relevant Goad Plan for each centre. The figures only show the footprint floorspace and the site area without the building lines. They do not therefore provide a definitive floorspace figure, but do nevertheless provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

which has significantly improved the scale and quality of its retail offer. The scheme is anchored by Waitrose (1,966m^2 net) and includes a number of national multiple retailers (e.g. Clarks, Boots and WH Smith). Other key food retailers in the town centre include Sainsbury's (1,731m^2 net) and Iceland (186m^2 net) on Warwick Road. The town also has a wider mix of independent and multiple retailers that contribute to its overall attraction as a destination for both local residents and visitors to the area.

4.6 Outside of the District's main town centres, there is also small retail provision at neighbourhood centre level, including the recent permission for a Co-Op foodstore (440m^2) at Woodloes. The Sainsbury's Local at Coten End (293m^2 net) is also located outside Warwick Town Centre, as defined by the Local Plan Proposals Map. Tesco also operate an Express store at Leyes Lane, Kenilworth (out-of-centre) and at Cubbington Road, Lillington. In addition, a Sainsbury's Local store is due to open within the former Qak Inn on Radford Road in Royal Leamington Spa (out-of-centre). These smaller independent and multiple convenience stores in the local and neighbourhood centres predominantly meet the 'day-to-day', more frequent 'top-up' and service needs of their local resident catchment populations.

4.7 The key characteristics and performance indicators for Royal Leamington Spa, Warwick and Kenilworth Town Centres are described in more detail in the health checks set out in Sections 5-7.

OUT-OF-CENTRE RETAIL PROVISION

4.8 The majority of Warwick District's main out-of-centre retail floorspace is located between Royal Leamington Spa and Warwick town centres, close to the junction of the A425 and A452 (Europa Way).

4.9 As the table below shows, **Leamington Shopping Park** (in Warwick) is the District's largest out-of-centre shopping facility. It is owned by British Land and comprises eight units ranging in size from 465m^2 to 3,716m^2 net, including Sainsbury's, Argos, New Look, Boots, Next and Clarks. The scheme benefits from Open Class A1 consent and its attraction as a shopping destination has been strengthened by the opening of a new Debenhams store (3,716m^2) in October 2013. In addition there are a number of food and beverage retailers, including a KFC 'drive-thru' restaurant and Caffe Nero.

4.10 Other retail warehouse schemes in the District include **Shires Gate**, located adjacent to Leamington Shopping Park and occupied by Mothercare World and Currys. In addition, Homebase, Pets at Home, Dreams and Blockbuster are located on Myton Road. However, both Blockbuster and Dreams had gone into administration at the time of finalising the study and the Blockbuster unit was vacant.

Table 4.2 **Out-of-centre retail provision in Warwick and Leamington**

Retail Park	Operators
Leamington Shopping Park (Warwick)	Argos; Boots; Carpetright; Carphone Warehouse; Clarks; Debenhams; Everything Everywhere; Halfords; Mammas & Papas; New Look; Next; Outfit; Caffe Nero; Greggs; Frankie & Benny's; KFC; Subway
Shires Gate (Warwick)	Mothercare World; Curry's
Myton Road (Leamington)	Homebase; Bensons for Beds; (Dream; Pets at Home
Emscote Road (Warwick)	Homebase; Owens
Wharf Street (Warwick)	Godiva Carpets; Wallaby's; Flooring Inspirations; Bedlam
Old Warwick Road (Leamington)	Travis Perkins; Jewson
Rugby Road (Leamington)	Jewsons

4.11 Apart from the Sainsbury's in Leamington Shopping Park, Warwick District has a good provision and choice of **out-of-centre foodstores**, including Asda at Chesterton Drive, Sydenham Morrisons on the Old Warwick Road in Leamington and Tesco at Emscote Road, Warwick.

Table 4.3 **Out-of-centre foodstore provision in Warwick and Leamington**

Operators	Address
Sainsbury's	Leamington Shopping Park, Warwick
Sainsbury's	Coten End, Warwick
Asda	Sydenham, Royal Royal Leamington Spa
Morrisons	Old Warwick Road (former Ford foundry site), Royal Leamington Spa
Tesco	Emscote Road, Warwick
Tesco Express	Cubbington Road, Royal Leamington Spa
Tesco Express	Leyes Lane, Kenilworth
Lidl	Myton Road, Warwick
Aldi	Queensway, Royal Leamington Spa
One Stop	Tournament Fields, Warwick

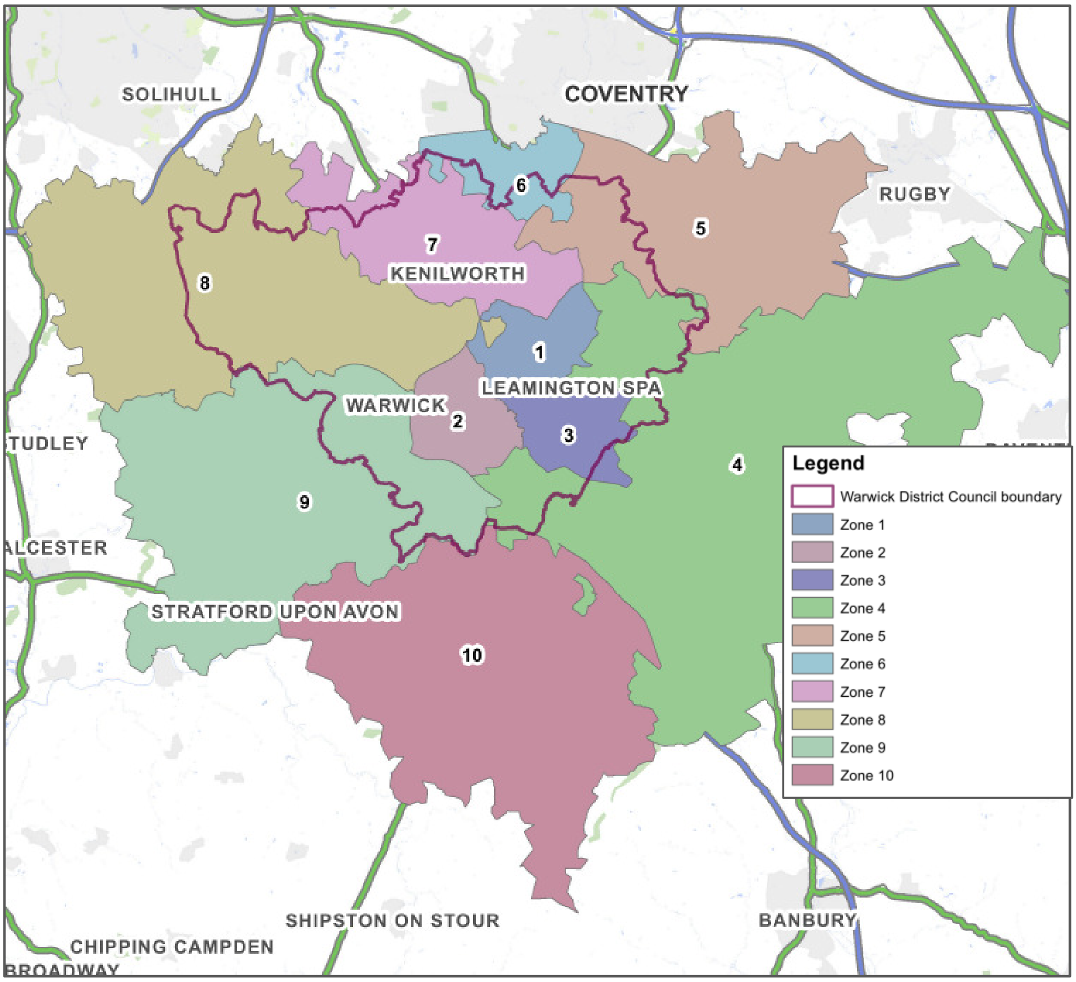
4.12 The out-of-centre superstore provision has also been further strengthened by the opening of the new Morrison superstore at the former Ford Foundry site, the new Lidl store on Myton Road and Aldi at Queensway. Permission was also granted in 2012 for a small Co-Op store adjacent to Reardon Court Local Centre (Woodloes), to the north of Warwick Town Centre and (on appeal) in 2013 for a Sainsbury's Local ($221m^2$ net tradable area) on the Radford Road in Leamington.

HOUSEHOLD SURVEY – STUDY AREA & APPROACH

4.13 A telephone interview survey of 1,000 households was conducted by the market research consultancy *RMG:Clarity* in July 2013 to help inform the assessment of current shopping and leisure patterns and preferences across Warwick District and a wider study area. The questionnaire was designed by SP, working in partnership with the Council (see **Appendix 3**).

4.14 **Figure 4.1** shows the extent of the study area defined for the purpose of this retail assessment. This study area is the same as used for the 2009 RLS[9] and 2013 *Refresh* study.

Figure 4.1 **Study Area and Zones**



4.15 As the figure shows the study area is subdivided into ten zones based on postcode geography. The ten zones have then been further grouped together to define geographic areas that broadly correspond to the 'core' catchments of the District's three main centres.

[9] The household survey that informed the 2009 RLS was conducted between December 2008 and January 2009

Table 4.4 **Study Area and Zones**

Geographic Area	Household Survey Zones
Core East (Royal Leamington Spa)	Zones 1 and 3
Core West (Warwick)	Zone 2
Kenilworth	Zone 7
Outer North	Zones 5 and 6
Outer East	Zones 4 and 10
Outer West	Zones 8 and 9

Source: Warwick RLS (2009)

4.16 In this case, Zones 1-3 and Zone 7 broadly correspond to the immediate residential catchments of Royal Leamington Spa, Warwick and Kenilworth. The rest of the study area (Zones 4-6 and 8-10) represent the wider catchments of the District's main centres, but principally Royal Leamington Spa.

4.17 However, it is important to state at the outset that this wider study area does not represent a realistic catchment for the District's smaller centres, or indeed its out-of-centre foodstores and shopping locations. The catchments for these smaller centres and individual stores will depend on a range of factors including, *inter alia*, the scale, quality and attraction of their retail offer; their location within the defined catchment area and zones; their accessibility by a range of modes of travel; and the 'like-for-like' competition from similar stores and centres both within and outside the study area.

4.18 In total some 1,000 interviews were conducted across the study area's ten zones (i.e. broadly equivalent to 100 surveys per zone in accordance with good practice). A number of measures were put in place by the market research company to ensure each sample was representative of the profile of the person responsible for shopping in the household. Responses across the study area were weighted by the population in each zone to ensure that the results of respondents in more sparsely or heavily populated area were not under or over represented in terms of the market share assessment. This is a standard approach that helps to ensure the survey results provide a robust and realistic picture of shopping and leisure patterns.

4.19 The full (weighted) survey results are set out in **a separate volume to this study.**[10]

4.20 The survey-derived market shares for the different types of convenience and comparison goods shopping are set out in **Appendix 4** and **Appendix 5** respectively. It should be noted that the market shares have been recalibrated and reweighted at the outset in accordance with good practice to remove any responses not relevant to the quantitative assessment[11].

[10] The household survey results will be made available by the local planning authority upon request. However, please note that there may be a charge for providing the detailed results to cover administration costs, etc.

[11] The market shares have been recalibrated to discount all non-responses and also Special Forms of Trading (SFT), including Internet and mail order shopping. This is common practice in retail assessments, as an allowance is made for SFT when assessing average expenditure levels.

4.21 They key shopping patterns and market shares for convenience and comparison goods are described in more detail below.

CONVENIENCE GOODS - MARKET SHARE ANALYSIS

4.22 Convenience goods[12] retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable household goods (such as washing up liquid, kitchen roll, bin bags, etc.).

4.23 In order to assess current food shopping patterns across the study area, the household survey asked standard questions to determine where households *"normally"* carry out their main 'bulk' (Q2) and 'top up' (Q6) food purchases. Households were also asked whether they regularly visit any other stores for 'secondary' main food shopping (Q5). The market shares for these different types of food shopping have been 'weighted' based on judgements as to the proportion of household expenditure normally accounted for by 'main' and 'top up' purchases[13]. In this case a standard weighting of 65% for main food shopping, 10% for secondary and 25% for top-up shopping has been applied.

4.24 **Appendix 4** sets out the final baseline market share (%) results for 'main' (Table 1), 'secondary' (Table 2) and 'top up' (Table 3) shopping on a zone-by-zone basis. Some of the key headline results are briefly described below.

4.25 For **'main' food shopping**, the market share analysis confirms that the District's main foodstores are achieving a strong 'retention' of shopping trips and expenditure within their 'core' catchment zones in 2013. For example, the market shares for main food shopping in the Leamington ('Core East' – 98.6%), Warwick ('Core West' – 97.1%) and Kenilworth (92.4%) zones are high. The analysis also shows that the District's out-of-centre stores dominate 'main' food shopping trips in the Core East and Core West zones, with a combined market share of 79.5% and 62.7% respectively. The most popular out-of-centre foodstores are Asda at Chesterton Drive, Sainsbury's at Leamington Shopping Park and Tesco at Emscote Road. The new Morrisons store (Old Warwick Road) and Aldi (Queensway) have also significantly consolidated out-of-centre foodstore provision in the District over the last 12 months. Overall the survey-derived market shares do not point to any underlying weakness or 'gaps' in the District's out-of-centre food offer. However the analysis does confirm that Royal Leamington Spa Town Centre has a limited market share within its 'core' zone (14.7%), compared with Warwick[14] (26.5%) and particularly Kenilworth (70.9%). This reflects that the fact that Royal Leamington Spa does not have a major superstore currently anchoring its

[12] For the purpose of this retail assessment 'convenience goods' and 'food' shopping have the same meaning.

13 This weighting has been informed by the responses to Q7 of the survey.

[14] Please note that it has been assumed for the purpose of this retail assessment that the Sainsbury's store at Saltisford forms part of Warwick town centre's offer.

food offer. Although a new Co-operative store has opened on The Parade since the completion of the household survey, this store largely serves a top-up shopping function rather than acting as a main food shopping destination and anchor.

4.26 In terms of **'top up' shopping**, the market share analysis also shows that the District's main food and convenience stores are achieving strong 'retention' levels within their 'core' catchment zones. For example, the market shares for 'top-up' food shopping in the Leamington ('Core East' – 90.8%), Warwick ('Core West' – 92.5%) and Kenilworth (98.4%) zones are relatively high. In contrast to its more limited 'main' food shopping role, Royal Leamington Spa Town Centre is achieving the highest market share for 'top-up' shopping (48.8%) within the Core East zone than the out-of-centre stores (25.9%). This reflects its important role for more frequent daily purchases serving the needs of people who live, work, visit and shop in the town centre. In comparison Warwick and Kenilworth Town Centres function as important destinations for both main and top-up food shopping, which reflects the fact that both centres have one or more foodstore anchors.

4.27 Table 4 (**Appendix 4**) draws together the different market shares to provide the composite analysis for convenience goods retailing. The overall market shares confirm the relatively strong retention of all food shopping trips and expenditure within the District's 'core' zones. This overall (composite) market share analysis forms the basis for the retail assessment.

COMPARISON GOODS - MARKET SHARE ANALYSIS

4.28 Comparison goods[15] are generally defined as items purchased on an infrequent basis and include clothing, footwear, DIY, household and recreational goods. In order to provide a more accurate and robust picture of comparison goods market shares across the study area and zones, the household survey asked where people normally shop for the following different types of comparison goods purchases (as defined by Experian Business Strategies):

- clothing and footwear;
- small domestic and large domestic appliances;
- audio-visual, photographic, computer equipment and recording media (e.g. radio, TV, Hi-Fi, CDs, DVDs, etc.);
- games, toys, hobbies, sports, camping and musical instruments;
- pets and pet related products;
- personal and luxury goods (e.g. jewellery, watches, china, beauty and chemist items.

[15] Please note that comparison goods and non-food shopping have the same meanings. See Glossary of Terms for a more detailed definition of comparison goods.

- furniture, carpets, floor coverings, textiles, curtains, soft furnishings, etc.;
- DIY goods, hardware, decorating supplies, gardening products, etc.; and
- books and stationary;

4.29 The weighted market shares (%) for the different types of comparison goods shopping are set out in Tables 1-11 of **Appendix 5**. The following provides a brief summary of the key trends identified for selected categories:

- **Clothing and footwear** – Royal Leamington Spa is the most popular destination for residents in the study area (see Table 1). The town centre's total current market share of 38.6% is comparable to that achieved in 2009 of 38.5%. Neither Warwick (1.2%) nor Kenilworth (1.0%) Town Centres are major fashion shopping destinations, which reflects their more limited offer. The District's out-of-centre stores have increased their market share for clothing and footwear purchases from 0.3% in 2009 to 2.8% in 2013. This increase is mainly explained by new (fashion) retailers opening in Leamington Shopping Park, which benefits from Open A1 consent. The likelihood is that Leamington Shopping Park will increase its market share over time, particularly following the opening of Debenhams. The main competing fashion shopping destinations are Coventry (17.1%), Stratford-upon-Avon (16.9%) and Solihull (11.2%).
- **DIY, hardware and gardening products** – The District's shops and stores in this category are achieving a total market share of 32.3% across the study area, which is lower than the 43.6% achieved in 2009. Within the Core East (Leamington) and Core West (Warwick) zones the District is achieving relatively strong market shares of over 70%. Royal Leamington Spa Town Centre is achieving a good market share in this specific retail category, although the Homebase stores at Myton Road and Emscote Road are the most popular out-of-centre stores.
- **Furniture, carpets and household textiles** – The District's shops and stores are achieving a 34.2% market share within the wider study area, increasing to 70.8% within the Core East zone. Royal Leamington Spa Town Centre is a popular destination for these types of purchases, achieving a market share of 21.7% across the study area and 48.7% in the Core East zone. Notwithstanding this, the town centre is facing increasing competition from out-of-centre retailing and from stores located outside the District, principally in Coventry, Solihull and Stratford.
- **Domestic electrical appliances** – The survey-derived market share analysis shows that the District's centres and stores are achieving a retention level within the study area of 43.2% for large appliances and 45.1% for small electrical appliances. This retention level increases significantly with the Core

East and Core West zones. For example, within the Core East zone the total retention level for large electrical appliances is 89.3%, of which the District's three main town centres are achieving a combined market share of 46.6% and the out-of-centre stores have a total share of 42.7%.

4.30 In order to identify the overall market shares for comparison goods shopping, the shares for the different categories of non-food shopping have been weighted by the available expenditure (by goods type) within each survey zone. This approach provides a more robust assessment of the distribution and weight of spend. This means that the resultant market shares that underpin the retail assessment are not 'skewed' by any particular comparison goods expenditure category.

4.31 The total market share estimates for all comparison goods on a zone-by-zone basis are set out in Table 12 of **Appendix 5**. This table provides a key input to the retail capacity assessment. The table below also highlights the differences between the market shares derived from the 2009 household survey (identified in brackets) and the more recent 2013 survey.

Table 4.5 **Comparison Goods - Changes in Total Market Shares (%) between 2009 (in brackets) and 2013**

	Core East	Core West	Kenilworth	North	East	West	TOTAL
Royal Leamington Spa	61.0 (74.0)	40.3 (47.1)	26.7 (33.9)	8.7 (7.8)	28.6 (34.5)	8.1 (12.6)	27.9 (33.3)
Warwick	1.9 (2.1)	15.9 (22.2)	2.0 (2.7)	0.4 (0.4)	1.1 (1.3)	3.3 (3.6)	3.3 (4.0)
Kenilworth	0.7 (0.4)	0.7 (0.6)	28.9 (26.6)	1.0 (0.7)	0.5 (0)	0.4 (0.8)	3.1 (3.3)
Out-of-Centre	20.1 (10.0)	16.5 (7.9)	3.4 (3.6)	0.8 (1.0)	6.0 (4.1)	3.2 (2.0)	8.2 (4.4)
Other District	0.6 (0.7)	1.8 (0)	0.6 (0)	0.1 (0)	0.3 (0)	0.5 (0.2)	0.6 (0)
Outside District	15.6 (12.9)	24.7 (22.2)	38.4 (33.3)	89.0 (90.1)	63.5 (60.2)	84.5 (80.9)	57.0 (54.7)
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**

Notes: 2009 market share figures in brackets have been derived from the *2009 Retail and Leisure Study*.

4.32 The table shows that all the District's main town centres have experienced a fall in their market shares since 2009. For example, Royal Leamington Spa's market share has fallen markedly from 33.3% to 27.9% across the study area as a whole, and from 74% to 61% in the Core East zone. This fall is mainly explained by the increased market share of out-of-centre stores in the District, and the draw of competing shopping destinations outside the study area. Indeed the District's out-of-centre retailing has effectively doubled its total market share from 10% to 20.1% in the Core East area and from 7.9% to 16.5% in the Core West area.

4.33 Another key threat to Royal Leamington Spa's market share is the increasing competition from new retail development and investment outside the District. For example, new retail developments are planned in Banbury (out-of-centre) and Coventry Town Centre that will have a ('like-against-like') impact on Royal Leamington Spa's market share of comparison goods shopping.

SUMMARY

4.34 Overall the survey findings have identified a strong foodstore provision across the District. This is illustrated by the fact that Warwick District's foodstores are retaining a high proportion (96%) of total convenience goods shopping trips and expenditure. In particular the District's out-of-centre foodstores account for a significant market share of main food shopping trips and expenditure; including Asda at Chesterton Drive, Sainsbury's at Leamington Spa Shopping Park and Tesco at Emscote Road. This out-of-centre provision has recently been strengthened by the new Morrisons store on the Old Warwick Road (former Ford Foundry site). Against this background of increased out-of-centre provision both Royal Leamington Spa and Warwick Town Centres would benefit from stronger foodstore anchors either within or on the edge of their primary shopping areas (PSAs) to help improve their competitive position and their overall vitality and viability, through linked trips and increased footfall.

4.35 The District's 'retention' of comparison goods expenditure across the wider study area is lower than for convenience goods at 43%, but this increases to almost 74% within the 'core' District zones (this market share is the average for the 'Core East', 'Core West' and 'Kenilworth' zones). The survey findings confirm that Royal Leamington Spa remains a popular destination for most comparison goods categories; in particular clothing, footwear and fashion shopping. However, a comparison of the 2013 and 2009 household survey results show that Leamington Spa's overall market share is falling, whereas the market share for the District's out–of-centre shopping locations has increased. This highlights the priority for new retail floorspace to be focused in the town centre first in order to counter the increased competition from out-of-centre stores and shopping facilities, as well as from competing shopping attractions outside the District and the forecast growth in the market share of online shopping.

5.0 ROYAL LEAMINGTON SPA TOWN CENTRE: HEALTH CHECK UPDATE

5.1 Sections 5-7 provide a more detailed review of the changes in the overall health and performance of Royal Leamington Spa, Warwick and Kenilworth Town Centres as shopping and leisure destinations since the 2009 RLS was conducted.

5.2 This analysis is based on a wide range of Key Performance Indicators (KPIs) that are widely used (where the information exists) to assess the overall vitality and viability of centres for both plan-making and decision-taking purposes. These KPIs include, *inter alia*, the diversity of uses, market demand, retail rents and vacancy levels. To help inform this assessment we have drawn on various published data sources (including Experian Goad, CoStar and EGi) and carried out site visits/audits of the District's main centres.

OVERVIEW

5.3 Royal Leamington Spa is an affluent town in Warwickshire. The town centre is the principal shopping and commercial centre within the District, serving the population's retailing needs and requirements, as well as a wider shopping and tourist 'catchment'. The town centre's shopping provision is essentially divided by the River Leam and there are two distinct retail areas, namely the 'New Town' and 'Old Town'.

New Town

5.4 The New Town is focus of commercial activity, especially for comparison goods and fashion retailing. The town's retail offer is principally centred on and around the Parade (i.e. between Regent Street and Warwick Street), and includes the Royal Priors Shopping Centre.

5.5 The Parade comprises a good range of quality retailers accommodated in a mix of small, medium-sized and larger format stores. The town's retail offer is primarily anchored by the House of Fraser department store (trading on four floors) and the adjoining Marks & Spencer. The former offers a mix of traditional high street fashion retailers including Miss Selfridges, Oasis, Coast, etc. This part of The Parade also hosts a range of mainstream national multiple retailers including Next, Monsoon, The Body Shop, and Wallis.

5.6 The covered **Royal Priors Shopping Centre** opened in 1987. It comprises circa 14,000m^2 of gross retail floorspace on two levels and is anchored by the town's second Marks & Spencer store. Although the Centre has lost a number of key fashion retailers over the last two years (including Miss Selfridges, La Senza, and Jane Norman), it still has a good choice of high street brands. The shopping centre benefited from a small (1,495m^2) extension in 2002, known as 'Whitehead Court', which accommodates a number of key retailers including Jigsaw, Starbucks and Gap. The southern section of the Centre (Satchwell Court) has also benefitted from new investment with new high profile tenants including Cath Kidston and a Carluccio's restaurant. The latter joins a growing portfolio of key restaurant brands in the centre including Nandos and Wagamama.

5.7 **Regent Court** is the only major retail investment in the town over the last decade or more. The scheme opened in August 2005 and comprises an open-air pedestrianised shopping street that runs between the Parade and Regent Street. It has some 30 units and a total floorspace of circa 5,645m^2 at ground floor level and some 132 apartments above. The scheme includes a Travelodge Hotel (10,460m^2) in the Grade II Listed former Regent Hotel. Its current tenant mix comprises more up-market national retailers (including L K Bennett, Space NK, Jaeger and Austin Reed), and a good choice of restaurants (Strada and Prezzo) and cafés (Starbucks and Bar Angeli). However the scheme has struggled as a shopping location since it opened, with footfall and rental levels well below those achieved in the town's prime shopping areas. As a result it has never been fully let. Following the recent sale of Regent Court by Threadneedle to New River Retail the centre has repositioned itself as a 'restaurant quarter'. The recent addition of Nandos will further enhance the centre as a food and drink destination.

5.8 Other key retail pitches in the New Town include:

- **Upper Parade** - The Parade continues north beyond its junction with Warwick Street and hosts a range of national multiple retailers and commercial leisure operators (including Tesco Metro, Boots, Evans and McDonalds). However, a number of retailers have also closed or gone out of business since 2008 (including MK One, Adams, Shoe Zone, and Moben Sharps/Dophin).

- **Lower Parade** - To the south of Regent Street, the Parade continues towards the 'Old Town' where it amalgamates with Bath Street, and is more secondary in nature. Following the closure of the Woodwards department store in July 2004 the building has been remodelled and refurbished to create a mixed-use scheme of circa 1,579m^2, with retail at ground-floor and residential above. The site is now occupied by River Island which serves as an important retail anchor for this section of The Parade. Other key retailers in Lower Parade include Clarks and Laura Ashley.

- **Warwick Street, Regent Street and Park Street** - These three secondary streets follow the outer perimeter of the Royal Priors Shopping Centre and constitute a mix of purpose-built and converted retail properties hosting a complementary mix of Class A1- A5 uses. Warwick Street also has a second department/variety store (Heart of England), which is situated slightly beyond the main retail circuit and does not benefit from the strongest pedestrian flows. The store mainly focuses on household goods. The eastern section of Regent Street has undergone investment in a number of shop units including the sub-division of two former vacant units to create two extra units (three of the four units are now occupied). In contrast, the western section of Regent Street is characterised by a higher number of vacant units.

Old Town

5.9 The Old Town area is located to the south of the River Leam and its retail offer is characterised by lower value retailers. It functions as a secondary shopping area and complements the New Town's retail and service offer. It is mainly characterised by small unit shops that reflect the area's history as the original town centre. The shopping facilities are almost exclusively confined to Victoria Terrace and Bath Street, which at its southern end forks into Clemens Street and the High Street.

5.10 The Old Town mainly serves the day-to-date needs of its large walk-in catchment, comprising the surrounding residential neighbourhoods and a large student population. It also captures passing trade from commuters walking to and from the railway station. The Old Town has benefited from new investment over recent years, including Royal Leamington Spa's selection as a *'Portas Pilot Town'* which is funding environmental improvements and events in the Old Town. Additional funding has also been raised from residents and local businesses for the High Street initiative.

DIVERSITY OF USES

5.11 To help inform the assessment of the current retail, leisure and service provision in Royal Leamington Spa, Warwick and Kenilworth we have referred to the latest Experian Goad *Town Centre Category Reports*. Drawing on the previous Experian Goad report used to inform the 2009 RLS, the table below shows the changes Royal Leamington Spa's retail and service outlets and floorspace over the last four years. Please note that for Royal Leamington Spa, all references to the 'Town Centre' include both the 'new' and 'old' town, unless otherwise stated.

5.12 The tables shows that Leamington has 678 retail and service outlets (including vacant units recorded at the time of the audits) trading from a total ground-floor 'footprint' floorspace[16] of 121,117m^2; which is equivalent to an average unit size of 179m^2. This represents an increase in the number of outlets since 2008 (+15 units), but a small fall in total floorspace (-1,050m^2). The key changes identified by the tables are explained in more detail below.

[16] The floorspace figures are derived from the Experian Goad Plans and show 'footprint' floorspace. They should not therefore be read as a definitive report of floorspace, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

Table 5.1 **Diversity of Uses (Outlets)**

Operator Type	July 2008		December 2012		% Change	2009	2012
	No. of Outlets	Outlets (%)	No. of Outlets	Outlets (%)		Index[17]	
Comparison	266	40.12	255	37.61	-4.14%	113	114
Convenience	43	6.49	40	5.9	-6.98%	63	72
Retail Service	75	11.31	80	11.8	6.67%	89	85
Leisure Services	137	20.66	139	20.5	1.46%	97	93
Financial Services	67	10.11	71	10.47	5.97%	87	95
Vacant	75	11.31	93	13.72	24.00%	n/a	119
Total	**663**	**100**	**678**	**100**	**2.26%**	**-**	**-**

Source: Centre Category Reports, Experian (2008 and 2012)

Table 5.2 **Diversity of Uses (Floorspace)**

Operator Type	July 2008		December 2012		% Change	2009	2012
	Area (m^2)	Area (%)	Area (m^2)	Area (%)		Index	
Comparison	51,858	42.45	48,467	40.02	-6.54%	109	109
Convenience	8,370	6.85	7,915	6.54	-5.43%	63	45
Retail Service	10,582	8.66	11,027	9.1	4.21%	89	124
Leisure Services	28,029	22.94	28,967	23.92	3.35%	97	104
Financial Services	11,399	9.33	11,306	9.33	-0.81%	87	112
Vacant	11,929	9.76	13,434	11.09	12.61%	n/a	119
Total	**122,167**	**100**	**121,117**	**100**	**-0.86%**	**-**	**-**

Source: Centre Category Reports, Experian (2008 and 2012)

Comparison Provision

5.13 There are currently estimated to be some 255 non-food shops in Royal Leamington Spa selling, trading from a total 'footprint' floorspace of 48,467m^2. Although this represents a small fall in provision since 2008, Royal Leamington Spa still has an above average provision of comparison goods retailing compared with the average for all centres and shopping facilities covered by Experian Goad.

5.14 The town's comparison offer is anchored by the House of Fraser department store on The Parade and a smaller variety store (Heart of England Co-Operative) on Warwick Street. It also has a number of major retailers including Marks and Spencer, which

[17] The Index illustrates the difference between a percentage figure for the centre and the UK average. An index of 100, for example, represents the 'national average' for the circa 2,500+ centres and shopping locations audited by Experian Goad, An index of less than 100 indicates a below average provision, and an index of over 100 represents above average provision. The index is an effective 'gap' analysis tool to help identify specific categories that are under- or over-represented in a centre.

operate two stores in the Royal Priors Shopping Centre and on The Parade. Fashion retailing is represented by a selection of popular UK multipliers including the Arcadia brands (Evans, Dorothy Perkins and Topshop), River Island, Laura Ashley, Monsoon, H&M, LK Bennett, Phase Eight and New Look. Since 2009, the town centre has attracted a number of new retailers including Superdry, H&M, NoaNoa, Whitestuff, L'Occitane and Joules.

5.15 The table below shows that Royal Leamington Spa has above average provision of fashion clothing and footwear retailing. The total 'footprint' floorspace of 15,868m^2 represents 13% of total floorspace in the town centre, which is above the national average of 9.8%.

Table 5.3 **Fashion (Clothing & Footwear) Retailing**

Operator Type	Outlets			Floorspace		
	No. Outlets	% of Total	UK Average (%)	Area (m^2)	% of Total	UK Average (%)
Children's & Infants Wear	4	0.59	0.45	492	0.41	0.36
Clothing General	20	2.95	2.10	4,004	3.31	3.45
Footwear	5	0.74	1.16	790	0.65	0.95
Ladies & Men's Clothing	12	1.77	1.21	3,196	2.64	1.66
Ladies Wear & Accessories	27	3.98	2.82	4,849	3.89	2.59
Men's Wear & Accessories	14	2.21	0.88	2,248	1.86	0.72
Total	**86**	**12.24**	**8.86**	**15,580**	**12.76**	**9.73**

Source: Goad Category Report, Experian (December 2012)

5.16 The number of fashion retailers has fallen from 98 to 86 between 2008 and 2012, mainly due to the impact of the economic downturn on retailing and the High Street. This is a trend which has occurred across many of the UK's high street, resulting in the failure of a number of key high street retailers (including Woolworths formerly at 60-64 The Parade). Other major comparison goods retailers that have been forced into administration in the last year include HMV, Blacks and Jessops, with the latter closing its outlet on The Parade and HMV closing its store in the Royal Priors in early 2014.

5.17 Although Leamington has a relatively good provision and choice of comparison retailers across all sub-categories, there are a number of operators absent that typically trade in comparable centres. For example, we would expect some of the following retailers to have a market interest in Royal Leamington Spa:

- Bally
- Bench
- British Homes Stores (BHS)
- Books etc
- Cotswold
- F Hinds
- Hush Puppies
- JD Sports
- John Lewis
- Karen Millen
- Reiss
- Russell & Bromley
- Sole Trader
- Stead & Simpson
- Sunglass Hut

- Debenhams[18]
- Disney Store
- Envy
- Etam
- French Connection
- Footlocker
- Lush
- Maplin Electronics
- Matalan
- Nike Store
- Primark
- Quicksilver
- Thomas Pink
- TM Lewin
- Timberland
- Waitrose
- Whistles

Convenience Provision

5.18 There are estimated to be some 40 food and convenience goods outlets in Royal Leamington Spa (as defined by Experian Goad), trading from a total estimate 'footprint' floorspace of 7,915m^2 gross. This represents a fall in convenience provision since 2008.

5.19 Supermarket provision in the town centre has remained relatively unchanged since 2008. Its main foodstores are limited to Tesco Metro and Marks & Spencer on the Parade, Co-Op on Clemens Street and a Iceland on Bath Street. In addition, a new Co-op store opened in 2013 within the Premier Inn development at 156 The Parade. The town's convenience retail offer is supported by a number of smaller multiples (Spar and Costcutter) and independent retailers.

5.20 Overall, convenience retail only accounts for 6.5%[19] of centre floorspace compared to the national average of 14.6%. This reflects the absence of a major foodstore anchor in the town centre. The nearest larger format foodstore serving the main 'bulk' food shopping needs of the town centre's resident catchment are the out-of-centre Sainsbury's store on the retail park, and the new Morrisons superstore on the former Ford Foundry site.

Markets

5.21 A number of markets operate in the town centre including monthly farmers' markets at Pump Room Gardens (held on the fourth Saturday of the month). The market offers a range of locally produced goods and is popular with locals and tourists. In addition, seasonal markets operate at The Parade during the Autumn and Christmas periods.

Leisure Services

5.22 There are currently some 139 leisure services[20] in Royal Leamington Spa. This represents 20.5% of total provision and is slightly below the national average figure of 21.16%.

5.23 As Table 5.4 shows, there are 68 restaurants and cafes (Use Class A3) and provision is above the national average. There has also been an increase in the number of

[18] Debenhams has since taken the former Focus unit in the Leamington Shopping Park.

[19] Excludes the new Co-op store at 156 The Parade as the store open post-survey.

[20] Leisure services as defined by Experian Goad include cafes, bars, restaurants and take-away outlets; cinemas; casinos and betting offices; clubs and nightclubs; hotels and guest houses; sports and leisure facilities; bingo halls; and amusement arcades.

restaurants and cafes since 2008. The A3 offer include a mix of national multiple operators and independent traders. The main multiples are concentrated in the New Town area and include Pizza Express, Wagamama, Bills, McDonalds and Zizzi (all located on the Parade), La Tasca (Warwick Street), Ask (Clarendon Avenue), Cafe Rouge (Regent Street), Prezzo (Regent Grove) and Strada (Regent Court). The town's restaurant offer has been further enhanced with the opening of a Nandos outlet in Regent's Court in 2013.

5.24 There are also an estimated 30 drinking 'venues' in the centre and these are predominantly independent operators. This represents a reduction from the number recorded by Experian in 2008 (35 venues).

Table 5.4 **Eating and Drinking**

Categories	OUTLETS			FLOORSPACE		
	No. Outlets	% Total	UK Average (%)	Area (m^2)	% Total	UK Average (%)
Eating Offer:						
Cafes	22	3.24	4.10	1,867	1.54	2.13
Restaurants	45	6.64	4.39	9,030	7.46	3.83
Sub-total	67	9.88	8.49	10,897	9	5.96
Drinking Offer:						
Bars & Wine Bars	10	1.47	1.47	1,830	1.51	1.83
Dance & Nightclubs	3	0.44	0.25	1,282	1.06	0.54
Public Houses	17	2.51	2.80	4,784	3.95	3.73
Sub-Total	30	4.42	4.52	7,897	6.52	6.10
Other:						
Fast Food/Take Away	28	4.13	5.47	2,583	2.13	2.62
Sub-Total	28	4.13	5.47	2,583	2.13	2.62
TOTAL	**125**	**18.43**	**18.48**	**21,377**	**17.65**	**14.68**

Source: Centre Category Report, Experian (December 2012)

5.25 Other leisure activities in the centre include two health clubs (Pure and Bizz Fitness) and a 6-screen cinema (The Apollo) operated by Vue Cinemas, situated to the west of the town centre on Portland Place East. In addition, the Royal Spa Centre serves as multi-arts centre comprising exhibitions, theatre and small film screenings.

5.26 These leisure services help to strengthen the attraction of the town's evening economy and also underpin the retail offer by encouraging local residents and visitors alike to spend more money in the centre.

Other Uses & Attractions

5.27 Experian Goad identified three hotels and guest houses in the town centre at the time of their audit. The main hotels include the 54-bed Regent Hotel operated by

Travelodge, which is located on the junction of the Parade and Regent Court; and the 48-bed independent hotel (Angel), which is at the junction of Kenilworth Street and Regent Street. In addition, the recent opening of the 83-bed Premier Inn at the former Regency Arcade (154-156 The Parade) has significantly improved Royal Leamington Spa's tourist and visitor accommodation in the heart of the town centre.

5.28 Apart from its hotels, Royal Leamington Spa also has a diverse range of other facilities, activities and attractions, including:

- an information centre
- community centre and halls
- advice centres
- places of worship
- theatres (Assembly Rooms & Loft)
- museum (Royal Pump Room & Baths)
- library
- public parks and gardens
- private and public sector offices
- educational facilities
- doctors surgery
- town hall
- dental surgery
- art gallery

5.29 These wider uses all contribute to the overall vitality and viability of the town centre, generating trips, footfall and expenditure.

RETAILER REPRESENTATION AND DEMAND

5.30 According to Experian Goad, some 215 outlets in Royal Leamington Spa are occupied by national multiple operators (Use Classes A1-A5). As the table below shows, multiples account for 31.7% of totals outlets in the town centre and 44.6% of all floorspace.

Table 5.5 **National Multiple Representation (2012)**

Categories	Outlets			Floorspace		
	No. Outlets	% Total	UK Average (%)	m^2	% Total (m^2)	UK Average (%)
Comparison	115	53.99	43.19	32,516	55.46	47.93
Convenience	15	7.04	11.03	5,881	10.03	22.54
Retail Service	19	8.92	9.94	3,428	5.85	4.99
Leisure Services	35	16.43	16.63	10,591	18.06	15.56
Financial Services	29	13.62	16.22	6,215	10.6	8.97
TOTAL:	**213**	**100**	**97.01**	**58,631**	**100**	**100**

Source: Centre Category Report, Experian (December 2012)

5.31 Compared with the 2008 Experian data, there has been a decline in the number of outlets occupied by national multiple operators by 24 outlets (-10.1%); from 237 to 213. This is mainly explained by the fact that a number of high street retailers have gone into administration since 2009 (most recently Jessops and Blacks on The Parade).

5.32 Retailer demand for representation in any centre is an important indicator used to assess a centre's overall health and viability. The main source is the CoStar Focus database that identifies known retailer and leisure requirements for approximately 1,000 UK centres and shopping locations. The most recent CoStar Focus report identifies 33 requirements for Royal Leamington Spa, including the following:

- **Comparison operators:** Matalan, Mint Velvet, The Fragrance Shop, Lush, Poundland, Brighthouse, Topps Tiles and Moshulu.
- **Convenience operators:** Pret a Manger, Millies Cookies and Heron Frozen Foods.
- **Leisure operators:** Maison Blanc Limited and The Gym Group

5.33 However, it should be noted that the CoStar database does not identify all requirements for centres, as many retailers and their agents prefer not to make their requirements known on the open market. Moreover, such databases only identify the current level of market demand and do not reflect how demand might change in the future. For example experience shows that a new scheme that offers retailers modern, well configured floorspace adjacent to like-minded tenants in a prominent location will generally generate a significant uplift in market interest and demand.

5.34 Notwithstanding this Royal Leamington Spa has consistently been ranked amongst the top 100 centres in the UK in terms of retailer requirements since 2000 and in our judgement its position will not have changed despite the impact of the economic recession.

COMMERCIAL PROPERTY INDICATORS (CPIS)

5.35 The estimates of Prime Zone A rental levels for Royal Leamington Spa, Warwick and Kenilworth are based on evidence set out in the CoStar *Town Centre* Reports and our discussions with local property agents.

5.36 The highest rents of are being achieved in the town's prime shopping locations (The Parade and Royal Priors Shopping Centre), where the larger format multiple retailers benefit from the highest levels of trips and footfall. For example, we understand that Prime Zone A's of up to £1,292 per m^2 (£120 per ft^2) have been achieved on The Parade. Regent Street is also reported to have achieved Prime Zone A's of around £915 per m^2 (£85 per ft^2).

5.37 Rental values for secondary retail locations are lower and range from £170 per m^2 (£16 per ft^2) on Clemens Street to £380 per m^2 (£35 per ft^2) on Warwick Street. This is because these secondary locations have lower footfall and typically attract more retail services, independent and lower value retail.

5.38 In comparison Regent Court is struggling as a shopping location. Prime Zone A's have reportedly fallen back to circa £269 per m^2 (£25 per ft^2) from £377 per m^2 (£35 per ft^2) over recent years.

VACANCY LEVELS

5.39 There were some 93 vacant units in December 2012 according to Experian Goad. This is equivalent to a vacancy level of 13.86%, which is above the national average for all centres covered by Experian of 12.22%. According to Experian the number of vacant outlets has increased from 75 in 2008, and vacant floorspace increased by 12.6% (to 13,434m^2 gross in December 2012).

Table 5.6 **Vacant accommodation**

Year	Outlets			Floorspace		
	No. of Outlets	% of Total Outlets	UK Average (%)	Goad Area (m^2)	% of Total (m^2)	UK Average (%)
2008	75	11.31	10.41	11,929	9.76	8.43
2012	99	13.72	11.50	13,434	11.09	9.34
Change	**+19**	**+2.41**	**+1.09**	**+1,505**	**+1.33**	**+0.91**

Source: Centre Category Report, Experian (2008 and 2012)

5.40 A recent survey of vacant units carried out by SP in February 2013 identified a fall in the number of vacant units to 80 outlets. For example H&M now occupy the former Woolworths store (60-64 The Parade)[21] and the former Regency Arcade (154-156 The Parade) has been redeveloped for a Premier Inn and Co-Op store. This is a positive sign that market demand from businesses for representation in the town centre is improving. There is also limited evidence of long-term vacancies in the town centre (see table below).

Table 5.7 **Long Term Vacancies (July 2008-February 2013)**

New Town	102 Parade; 1-3 and 5-9 Tavistock Street; 37, 63, 65 & 119 Regent Street; 34 Regent Grove
Old Town	4-6 Victoria Terrace; 6 Gloucester Street; 27 & 39 Bath Street; 6 High Street; 16, 30 & 31 Clemens Street

Source: Experian Goad Plan (July 2008) and SP audit (February 2013)

5.41 Moreover those units that have been vacant since July 2008 are proving difficult to let for a number of reasons; including the fact that they may be unsuitable (in terms of size and configuration) to accommodate the needs of modern format retailers. We also note that the majority of long term vacant units are within secondary retail locations. The greatest concentration is within the western section of Regent Street (west of the Parade), which has seen vacancies persist since the 2008 Experian Goad survey.

21 Although vacancy levels and the changes in vacancies are often referred to as a key indicator to help inform the overall assessment of the vitality and viability of centres, it should be recognised that some units recorded as being vacant at any point in time may be in the process of being fitted out or refurbished for new operators. It is therefore important to distinguish between short and long term vacancies in centres, and also the location of these vacant units (i.e. prime, secondary or tertiary streets).

5.42 Notwithstanding this, the current vacancy level of 11.7% (as a proportion of total outlets) is still high and is above the current national vacancy level identified by Experian of circa 11.5%.

PEDESTRIAN FLOWS

5.43 The 2009 RLS health check analysed footfall data for the town centre over a 10 year period between 1999 and 2008. An updated count was undertaken in 2012 using the same 42 count locations applied to the previous survey. The survey was undertaken by Pedestrian Market Research Services Limited (PMRS) on behalf of Warwick District Council and is set out in full in **Appendix 6**.

5.44 In summary, although there has been a small percentage decrease (-1.2%) in overall footfall in the ten year period up to 2012, there has been a marked increase in average pedestrian counts since 2009 (+18.2%). This suggests that the town centre remains a popular destination for a range of activities.

5.45 In terms of the distribution of footfall across the town centre, the highest counts were recorded in the Lower Mall of the Royal Priors Shopping Centre. The lowest recorded footfall was in the secondary shopping areas (such as Euston Place, Park Street and Warwick Street). In the Old Town, the highest pedestrian flows remain primarily along Bath Street and Victoria Terrace, and there has been a notable increase in footfall since 2009 at Victoria Bridge. Footfall appears lowest in the High Street and Spencer Street areas, which is also consistent with the findings of the 2009 RLS.

ACCESSIBILITY & PARKING

5.46 Royal Leamington Spa benefits from excellent road links to the national and regional road networks. The M40 provides a strong link to Birmingham and the north via the M42, M5 and M6, and south to London. Connections to the M1, M4, M25 and M23 provide good access to the rest of the United Kingdom. Coventry airport is located only 10 kilometres from the town.

5.47 The town is also easily accessed by a choice of public transport modes. The railway station is located in the south-east of the town centre and is a ten minute walk to the centre's prime retailing pitch. The station provides services to London and Birmingham; there are frequent services to London Marylebone, with a journey time of approximately 1 hour 45 minutes. The centre is also well-served by numerous national, regional and local bus routes.

5.48 Royal Leamington Spa also benefits from a good provision of both multi-storey and at grade car parking facilities strategically located across the centre. There are 1,877 car parking spaces in the town centre, including a good provision of disabled car parking facilities. The table below sets out the town's main car parks and the changes in total annual usage between 2007 and 2012.

5.49 The table shows that overall parking levels have increased, although there has been a fall in parking in the Old Town's car parks as a whole. However, over the past two years the trends have been in reverse with the Old Town car parks being more popular.

Table 5.8 **Changes in annual car parking levels**

Location	Spaces	2007/ 2008	2009/ 2010	2011/ 2012	% Change
Royal Priors (MSCP)	534	299,109	270,854	222,682	-26.6
Rosefield Street	44	18,073	15,210	15,559	-13.9
Adelaide Bridge	44	5,401	3,424	3,274	-39.4
St Peters	380	24,164	115,914	125,025	417.4
Covent Garden (Multi)	534	109,238	143,787	165,961	51.9
Covent Garden (Surface)	78	108,992	75,525	82,755	-24.1
Chandos Street	153	266,532	222,811	245,968	-7.7
Bedford Street	49	76,150	66,660	83,392	9.5
Sub Total - New Town	**1,816**	**907,659**	**914,185**	**944,616**	**4.1**
Bath Place	62	32,751	17,180	16,555	49.5
Packington Place	30	13,242	11,331	15,439	16.6
Court Street	40	7,973	5,440	10,308	29.3
Sub Total - Old Town	**132**	**53,966**	**33,951**	**42,302**	**-21.6**
TOTAL	**1,948**	**961,625**	**948,136**	**986,918**	**2.6**

Source: Warwick District Council – Car Parking Services Team

5.50 In the New Town, St Peters has experienced the greatest increase in annual car numbers over the five year period (+417%). The growth in numbers spiked in 2008/09 as a result of improved security and an expansion of the car park's operational hours. In recent years demand also appears to be increasing at the Bedford Street and Covent Garden car parks. In contrast, parking usage recorded at Chandos Street, which is subject to proposals for a new retail development (Clarendon Arcade), have declined by -7.7% over the last five years.

5.51 Overall, the increase in car parking usage across the town centre's car parks is a positive indication that more people are visiting Leamington. This marries up with the recorded increase in footfall levels. Given the challenges facing many town centres across the UK, the results are very positive and suggest that Leamington is a popular location for visitors and shoppers.

5.52 Our visual inspections of the town centre also identified a good provision for cyclists (i.e. cycle paths, parking etc.). Indeed, cycling is a popular means of travel for residents and students in Royal Royal Leamington Spa and subsequently a higher than average number of shopping trips is undertaken by this means of transport.

ENVIRONMENTAL QUALITY

5.53 Whilst it is difficult to be objective as to the environmental quality of any centre, the historic town centre is unquestionably attractive with a strong character and identity. The overall appearance and quality of the main shopping streets is good and well maintained. This is reflected by the fact that the town centre is designated a Conservation Area and has a number of historic buildings of national and local interest.

5.54 The compactness of the centre; traffic-free areas (such as Royal Priors and Regent Court); wide pavements in the primary shopping area; and a good provision of pedestrian crossings at grade, together with the fact that there no intimidating underpasses, all provide shoppers and visitors with a safe and pleasant environment in which to shop and visit. This is certainly the case for most of the New Town area. However there are number of areas where there appears to be long-term neglect, including the eastern section of Regent's Grove where there are a number of derelict buildings.

5.55 Overall, the prime retail pitches are well-maintained with no visual signs of graffiti, litter or areas of deprivation. The town centre has a good provision of street furniture, landscaped areas, litter-bins and signage. All these factors encourage shoppers and visitors into the centre and they are likely to spend a longer time perusing the shops. Insofar as these factors do actually contribute to a centre's vitality and viability, we consider their contribution to be positive.

5.56 Notwithstanding this, there is still a need to upgrade some derelict premises and sites in secondary and tertiary areas, particularly in the Old Town area. Particular 'hot spots' that would benefit from environmental and shop front improvements include High Street and Clemens Street. The recent funding from the Portas Pilot Town initiative will help with some of these improvements.

PLANNED INVESTMENT

5.57 As described in Section 1 to this study, the Council is working in partnership with Wilson Bowden Developments Limited (the commercial development arm of Barratt Developments plc) to deliver a new retail and leisure scheme on the 0.8ha Chandos Street Car Park site and adjoining land in the heart of Royal Leamington Spa. At the time of finalising this study we understand that Wilson Bowden is currently refining their plans for the site and a planning application is scheduled to be submitted in Spring 2014.

SUMMARY

5.58 In summary, Royal Leamington Spa remains a vital and viable town centre, despite the impact of the recession on retail investment, market demand and vacancy levels. The centre has a number of key strengths and opportunities:

- An attractive shopping environment and streetscape along The Parade.
- An increase in town centre usage based on pedestrian footfall levels and car park patronage since 2008/09.
- Good multiple retailer representation, balanced with a good choice of independent and specialist retailers.
- A strong visitor and tourist market that makes a significant contribution to the town's economy.
- Current opportunities for new retail development in the town centre on the Chandos Street car park.

5.59 Notwithstanding this there are some potential weaknesses and areas for concern include:

- A fall in the town's convenience and comparison provision since 2008.
- A 'gap' in the town's retail offer compared with competing town centres and shopping locations.
- The increased competition from out-of-centre shops and stores, particularly following the opening of a new Debenhams store in Leamington Shopping Park.
- The absence of a large foodstore to help anchor the town centre's retail offer.
- The increasing competition from other centres and out-of-centre retail locations across the region (including Stratford-upon-Avon, Solihull, Coventry, Birmingham, etc.) and the threat of online shopping.
- A fall in the town's market share of comparison goods shopping trips and expenditure since 2009.

6.0 WARWICK TOWN CENTRE: HEALTH CHECK UPDATE

6.1 This section reviews the changes in the overall health and performance of Warwick Town Centre based on a range of key performance indicators.

OVERVIEW

6.2 Warwick is the county town of Warwickshire and administrative centre of the County. It is a historic town situated approximately four kilometres from Royal Royal Leamington Spa, seven kilometres from Kenilworth, thirteen kilometres from Stratford-upon-Avon and fifteen kilometres from Coventry.

6.3 The town centre is characterised by its historic street pattern and buildings, including a number of churches, heritage buildings and public buildings, all of which are of architectural interest and have considerable value. These include the Collegiate Church of St Mary, one of England's largest churches, and the Warwickshire Museum, housed within the town's 17th Century market hall. The shopping streets also merge with narrow lanes and alleyways, which are a reminder of the earlier town. Other nearby attractions include Warwick Castle and Warwick Racecourse, which generate significant trips from day-trippers and tourists to the local area.

6.4 The majority of the shops and premises in the town centre are small, with a limited number of larger format units. As a result the centre's retail and service offer is mainly characterised by specialist/independent retailing, service business and places to eat and drink.

6.5 The historic nature of the centre and street pattern means that the town has not experienced significant new investment and development for many years. The town does not have any major new purpose-built modern retail floorspace, apart from Westgate House (which comprises Boots and Marks & Spencer Simply Food, with offices above).

6.6 Swan Street is the main focus for retail provision in Warwick and some of the key operators here include Superdrug, Subway, Greggs, Natwest, Lloyds TSB and Caffe Nero. Market Street accommodates a Costa coffee shop (part of the former Woolworths premises) and WH Smith. However, compared to Royal Leamington Spa there are limited multiple retailers. The streetscape in this area generally lacks the historic character in the remainder of the centre and as a consequence appears tired and stale, especially in terms of shop fascias and decor.

6.7 The pedestrian-friendly Market Place is the heart of the town centre and combines a mix of shops, public houses and civic offices. It also hosts numerous events throughout the year, including the popular charter market (every Saturday) and the farmer's market (on the fifth Saturday of every month). The markets draw a large number of local residents and visitors into the centre from which other shops and businesses also benefit. The markets also provide an important and different offer to Royal Leamington Spa.

6.8 The secondary shopping area which runs from the High Street into Jury Street and then into Smith Street, along an east-west axis, has a complementary mix of convenience, comparison and service operators, together with a diverse mix of other uses, in primarily historic premises. The linear street also has a good selection of public houses and restaurants.

DIVERSITY OF USES

6.9 The tables below summarise the changes in Warwick retail and service offer between 2008 and 2013 based on the Experian Goad *Town Centre Category Report*s.

Table 6.1 **Diversity of Uses (Outlets)**

Operator Type	April 2008		February 2013		% Change	2008	2013
	No. of Outlets	% of Total	No. of Outlets	% of Total		Index	
Comparison	95	34.93	91	32.38	-4.2%	99	98
Convenience	23	8.46	15	5.34	-34.8%	63	66
Retail Service	31	11.4	38	13.52	22.6%	90	98
Leisure Services	68	25	71	25.27	4.4%	118	114
Financial Services	33	12.13	36	12.81	9.1%	105	116
Vacancies	22	10.35	30	10.68	36.4%	78	93
TOTAL:	**272**	**100**	**281**	**100**	**3.3%**	**-**	**-**

Source: Centre Category Reports, Experian (2008 and 2012)

Table 6.2 **Diversity of Uses (Floorspace)**

Operator Type	April 2008		February 2013		% Change	2008	2013
	Area	% of Total	Area	% of Total		Index (v.UK average)	
Comparison	11,501	29.55	11,102	28.38	-3.5%	76	77
Convenience	6,996	17.98	6,494	16.60	-7.2%	63	114
Retail Service	2,341	6.02	2,815	7.20	20.2%	88	98
Leisure Services	11,808	30.34	10,860	27.77	-8.0%	135	121
Financial Services	3,725	9.57	4,840	12.38	29.9%	106	148
Vacancies	2,546	6.54	3,001	7.67	17.9%	78	82
TOTAL:	**38,917**	**100**	**39,112**	**100**	**0.5%**	**-**	**-**

Source: Centre Category Reports, Experian (2008 and 2012)

6.10 As the tables show there were 281 outlets in Warwick town centre in February 2013, trading from a total Goad 'footprint' floorspace of 39,112m^2. There has been a slight increase in the number of outlets since 2008 (+9 outlets), corresponding to a small increase in the total quantum of floorspace (+195 m^2). The following provides a more detailed assessment of the changes in the provision of the different types of retail and service provision in the town centre.

Comparison Provision

6.11 There were some 91 comparison goods retailers trading in Warwick in February 2013 from a total 'footprint' floorspace of 11,102m^2. Although the total provision of outlets (32.4%) is only slightly below the national average (33.1%), the level of floorspace provision (28.4%) is considerably below the national average (36.6%). This confirms the fact that the centre's comparison offer is dominated by smaller shop units, with an average size of circa 122m^2.

6.12 Much of Warwick's comparison retail offer serves the needs of its local residents and the wider visitor/tourist market. Generally, the quality of comparison retail provision is good and is characterised by a number of independent fashion retailers, along with a mix of jewellery, gift, souvenir and antique shops. It should be noted that since the last health check survey carried out by SP (as part of the 2012 '*Refresh*' Study) a number of new comparison retailers have opened in the town centre including a vintage clothes shop on Smith Street, a gift shop (Ceri Jam) on Market Square, a fashion accessories retailer (Pimpernikel) on Market Square, and JSK fashions on Brook Street. Furthermore only one closure was recorded over the same period (Jade Electrical on Market Street).

6.13 The town is not anchored by any major national department or variety stores. This is explained by the limited development opportunities in the town, and the fact that larger format retailers and multiples gravitate towards the larger centres of Royal Leamington Spa, Birmingham, Coventry, Solihull, etc. However, it should be noted that a smaller Co-op convenience store is due to open at Woodloes.

Convenience Provision

6.14 The town has some 15 food and convenience retailers trading from a total 'footprint' floorspace of 6,494m^2. Although the number of outlets is below the national average, convenience floorspace represents 16.6% of the town's total floorspace, which is above the national average of 14.6%. This is explained by the fact that the larger Sainsbury's supermarket at Saltisford and smaller Sainsbury's Local at Coten End are included in the town centre by Experian Goad.

6.15 There are notable 'gaps' in the town's convenience offer. For example, there are no fishmongers, frozen food retailers, and greengrocers. Although Experian's audit has not identified any off licences, we understand that an independent outlet (The Wine Shop) opened on Smith Street in 2013.

6.16 Between 2008 and 2012 Experian also identified that two greengrocers and one off licence in the town centre have closed, along with the three general convenience retailers, tobacconists and newsagents (CTNs) and one bakers/confectioners.

However, a more recent audit of the town centre has indicated that a number a number of specialist convenience shops have opened since 2012, including Cheeses of Warwick on Jury Street, Barkers Delhi on Old Market Square as well as The Wine Shop mentioned above.

Leisure Services

6.17 There are 71 leisure service operators in Warwick (as defined by Experian), which represents a slight increase from 68 recorded in 2008. This sector represents 25.3% of total outlets in the town, which is above the national average of 22.1%.

6.18 As the table below shows, eating and drinking establishments account for the majority of the town centre's leisure services provision.

Table 6.3 **Eating and Drinking**

Categories	Outlets			Floorspace		
	No. Outlets	% Total	UK Avg (%)	Area (m^2)	% Total	UK Avg (%)
Eating Offer:						
Cafes	13	5.34	4.09	1,329	3.4	2.12
Restaurants	22	7.83	4.39	3,261	8.34	3.82
Sub-total	35	13.17	8.48	4,589	11.74	5.94
Drinking Offer:						
Bars & Wine Bars	5	1.78	1.46	836	2.14	1.83
Public Houses	9	3.2	2.81	2,044	5.23	3.73
Sub-Total	14	4.98	4.27	2,880	7.37	5.56
Other:						
Fast Food & Take Away	11	3.91	5.47	687	7.76	2.62
TOTAL	**60**	**22.06**	**18.22**	**8,157**	**26.87**	**14.1**

Source: Centre Category Report, Experian (February 2013)

6.19 Warwick has a strong and growing mix of restaurants, cafes and public houses, catering for a wide range of tastes and age groups. Whilst its offer is mainly traditional and independent in nature, some national multiples are represented including Pizza Express, ASK and Lloyds No 1. It should be noted that since the 2013 *Refresh Study* the *Tilted Wig* public house on Market Square has reopened.

6.20 Compared with national averages, the town also has a relatively good provision of casinos and betting offices. However, there are currently no cinemas, theatres, concert halls, bingo halls, amusement arcades and nightclubs in the town centre (as measured by Experian). There also appears to be potential to provide more bars/wine bars and sports/ leisure facilities.

Retail & Financial Services

6.21 The Experian data shows that Warwick has a relatively good provision of shops/businesses in the following categories dry cleaners/launderettes (3 outlets); health and beauty operators (21); opticians (5); financial services (8); property services/estate agents (9); and retail banks (5). Also a travel agent is located on Market Place, which is not recorded by Experian Goad.

6.22 In contrast there is limited or no provision of the following retail and financial services; photo processing & photo studios, printing & copying, TV/video rental and building societies. This is not unexpected, however, as these types of retail and financial services have experienced the most significant impact from the growth of online shopping.

Other Uses & Attractions

6.23 Warwick has a strong provision of hotels and guest houses catering for the high volume of day trippers and tourists visiting the town's historic centre, together with nearby visitor attractions (such as Warwick Castle; Warwick Racecourse; museums; historic houses; gardens; theatres; events; and festivals). The Experian report indicates that there are three hotels and guest houses with a total floorspace of circa 1,820m^2 in the town centre. The visitor accommodation is independent in nature and is dominated by two principal hotels, the Lord Leycester on Jury Street (40 rooms) and Warwick Arms on High Street (35 rooms)

6.24 Warwick town centre is also an important administrative centre, with Warwickshire County Council being one of the largest employers in the town. The civic offices are spread across the centre, but the main concentration is to the north of Market Place. This results in a large volume of workers into the centre between Monday and Friday, especially at lunch-times and in the evenings. Other key uses include:

- private sector offices
- dwellings
- advice centres
- educational facilities
- museums
- art galleries
- community halls
- places of worship
- dental surgery
- library
- community centre
- tourist information

MULTIPLE REPRESENTATION AND DEMAND

6.25 The town centre is dominated by independent/specialist retailers, and has a more limited multiple offer (principally Boots, Sainsbury's, WH Smith and Superdrug). According to Experian the number of multiples fell from 55 in 2008 to 48 in 2013. The table below shows the town's current multiple offer in 2013, which is the same as for Kenilworth but significantly below that of Royal Leamington Spa (213).

Table 6.4 **National Multiple Representation (2013)**

Categories	Outlets			Floorspace		
	No. of Outlets	% of Total Outlets	UK Average (%)	Area (m^2)	% of Total (m^2)	UK Average (%)
Comparison	12	25	43.22	3,140	19	48.18
Convenience	8	16.67	11.03	15,385	44.71	22.3
Retail Service	3	6.25	9.94	260	1.36	5.01
Leisure Services	17	35.42	19.6	3,224	26.66	15.52
Financial Services	8	16.67	16.22	1,133	8.28	8.99
Total	**48**	**100**	**100**	**23,142**	**100**	**100**

Source: Centre Category Report, Experian (2012)

6.26 The latest CoStar report indicates that Warwick has requirements from 16 operators (see table below). The majority of these are seeking units of between c.100 – 300m^2, which broadly corresponds to the average size of the premises in the town centre. Of note, Matalan has a requirement for a larger unit of up to 3,250m^2 of retail floorspace. Other national retailers potentially seeking representation in the town include Phase Eight, Brighthouse and Card Factory. However, it is clear that Warwick, along with Kenilworth, will always lose out to higher order centres such as Royal Leamington Spa in terms of attracting major multiples.

Table 6.5 **Retailer Requirements**

Operator	Category	Floorspace Requirement (m^2)	
		Min.	Max
Glitz Accezzoriez	Comparison	37	93
Matalan Retail Ltd	Comparison	1,858	3,252
Phase Eight	Comparison	65	186
Sue Ryder	Charity Shop	74	650
Acorns Children's Hospice	Charity Shop	74	800
Cancer Research UK	Charity Shop	70	116
Card Factory	Comparison	93	232
Hatton Goldsmiths	Comparison	9	46
Brighthouse	Comparison	209	325
Bargain Book Time	Comparison	74	279
Select & Save	Comparison	325	372
Charlie Crown	Comparison	37	56
Headway Charity Shop	Comparison	46	93
Bonmarché	Comparison	232	232

Source: CoStar Retailer Requirements Report (November 2013)

VACANCY LEVELS

6.27 According to Experian there were 30 vacant retail and service outlets in February 2013, which represented 3,000m^2 (32,300ft^2) of vacant floorspace. The table below shows, Warwick's vacancy level is currently 10.7% (total outlets), which is just below the estimated national vacancy figure of 11.5%. Similarly, the proportion of vacant floorspace in the town centre (7.8%) is below the national average of 9.3%.

Table 6.6 **Vacant accommodation**

Year	Outlets			Floorspace		
	No. of Outlets	% of Total Outlets	UK Average (%)	Area (m2)	% of Total (m2)	UK Average (%)
2008	22	8.09	10.35	2,546	6.54	8.38
2012	30	10.68	11.51	3,001	7.67	9.30
Change	**+8**	**+2.59**	**+1.16**	**+455**	**+1.13**	**+0.92**

Source: Centre Category Report, Experian (2008 and 2012)

6.28 SP's more recent audit of the town centre in February 2013 identified that the longer term vacancies (i.e. outlets that have remained vacant since 2008) are mainly located in secondary locations, such as Smith Street. There were also two vacant units on Market Place which were formerly occupied by fashion retailers, but these have since been re-occupied by two hairdressers (namely Amorani hair salon and Jennifer Luis Hairdressing). Overall, the latest audit has indicated that there are currently limited vacancies in Warwick's prime shopping streets, principally Swan Street and Market Place.

ACCESSIBILITY & PEDESTRIAN FLOWCOUNTS

6.29 Warwick Town Centre benefits from good accessibility by a choice of means of transport. The railway station is located to the north of the centre, within a 10 minute walk of the primary retailing area (via Coventry Road which 'dog-legs' into Smith Street/Jury Street/High Street). There are also numerous bus routes to all parts of the town centre's catchment that terminate in front of Westgate House.

6.30 The Council have been monitoring footfall in the town centre since 2006, with the latest survey carried out in 2012. Footfall counts have been conducted in 23 locations, covering prime and peripheral locations. The survey was undertaken by Pedestrian Market Research Services Limited (PMRS) on behalf of Warwick District Council and is set out in full in **Appendix 6**.

6.31 In summary, the footfall figures show a reduction in average pedestrian counts since 2009 of -14.6% for the town centre. However, it should be noted that poor weather was recorded on one of the survey date ("*mild with heavy persistent rain*") and this could have impacted on shopping visits and footfall levels. Notwithstanding this fall between 2009 and 2011, the analysis of average pedestrian counts over the ten year period to 2011 shows an increase in average pedestrians footfall levels by 5%.

6.32 Further detailed analysis indicates that pedestrian footfall levels by location have remained largely unchanged since 2009 in terms of highest and lowest recordings. The highest pedestrian counts were recorded at survey points in and around Swan Street and Market Place, the town's prime shopping pitch, whereas the more peripheral and secondary streets had the lowest footfall (e.g. Church Street, Jury Street, etc.).

6.33 Overall, the pedestrian surveys suggest that Warwick is maintaining a steady footfall against the backdrop of a challenging economic climate, and competition from Royal Leamington Spa and other centres. Tourism and visitor trips to the town centre are clearly important to its overall vitality and viability. Therefore, measures to encourage linked trips between the town centre and key visitor attractions should be supported and promoted.

ENVIRONMENTAL QUALITY

6.34 Warwick town centre is designated as a Conservation Area and is characterised by many historic and attractive buildings and streets, with Market Place at its heart. In addition, there is a good provision of street furniture, landscaping, open spaces, public toilets and signage. The centre is well-maintained with no visual signs of graffiti, litter or pockets of dereliction. The priority should be to maintain, manage and enhance the town's environmental quality, in line with its important role as a tourist attraction and its day-to-day function as a place to live, work and shop for local residents.

SUMMARY

6.35 Warwick town centre has a good choice of independent, specialist and antique shops, as well as a range of places to eat and drink that cater for shoppers, day-trippers and tourists.

6.36 In comparison with Royal Leamington Spa, Warwick has a limited number of national multiple retailers. Royal Leamington Spa is clearly the destination of choice for the District's residents for fashion shopping and other goods and services. As a result Warwick has evolved as a largely complementary shopping location, with its smaller independent and specialist shops serving the more day-to-day needs of its local catchment population and visitors.

6.37 The town centre has not benefitted from significant new retail investment or development for many years. It has low multiple representation and limited market demand. There has also been a marked increase in vacancy levels since 2009. Given the proximity of Royal Leamington Spa, it is likely that the town centre will continue to lose shoppers and trade to the larger and more dominant centres and shopping destinations in its hinterland, including competing out-of-centre retail facilities. This suggests that its overall vitality and viability is vulnerable to competition and/or the loss of key retailers, particularly if opportunities for new investment and development in the town centre cannot be identified and promoted.

7.0 KENILWORTH TOWN CENTRE: HEALTH CHECK UPDATE

7.1 This section reviews the changes in the overall health and performance of Kenilworth Town Centre based on a range of key performance indicators.

OVERVIEW

7.2 The historic market town of Kenilworth is situated on the northern side of the District. It is six kilometres north-west of Royal Leamington Spa, seven kilometres north-east of the county town of Warwick and nine kilometres to the south of Coventry. It is smaller than Leamington and Warwick, and mainly serves the more frequent day-to-day retail and service needs of its local catchment population. Notwithstanding this, it does benefit from nearby local attractions, including Kenilworth Castle and Elizabethan Garden, and the surrounding Abbey Fields.

7.3 Kenilworth's retail and service offer is located of Warwick Road, which runs north-south through the town, and functions as the centre's traditional high street. There are a range of independent and national multiple retail and service operators in the town, including Superdrug, HSBC, Iceland, Barclays, Peacocks, Waitrose, Sainsbury's, Specsavers and Subway. The two other main retail areas within the town centre are

- **Talisman Square** – this centre benefited from a major redevelopment and refurbishment programme which secured Waitrose as an anchor tenant and attracted a number of national multipliers (including Dolland & Aitchison, Costa Coffee, Greggs, and Clarks). Although there is potential to provide additional retail development at the site, this will be dependent on market demand.
- **Station Road** – although this part of the centre suffered from long term vacancies following the closure of Budgens, the vacant store has since been occupied by Wilkinsons. Further along the Station Road is Millar Court, comprising eight small units.

7.4 The town's retail offer is largely anchored by Waitrose and Sainsbury's. These operators have considerably upgraded the shopping offer of the centre as a whole and have reduced the need for, and frequency of car-borne food shopping trips to out-of-centre locations and other competing towns.

DIVERSITY OF USES

7.5 The tables below show the changes in the town centre's retail and service offer (as measured by outlets and floorspace) between 2008 and 2012 based on the Experian Goad *Town Centre Category Report*s.

Table 7.1 **Diversity of Uses (Outlets)**

Operator Type	April 2008		January 2012		% Change	2008	2012
	No. of Outlets	% of Total	No. of Outlets	% of Total		Index (v.UK average)	
Comparison	62	37.8	65	38.92	+4.8	107	118
Convenience	13	7.93	12	7.19	-7.7	63	90
Retail Service	26	15.85	27	16.17	+3.9	125	119
Leisure Services	31	19.9	34	20.36	+9.7	89	93
Financial Services	19	11.59	17	10.18	-10.5	100	93
Vacancies	13	7.93	12	7.19	-7.7	77	59
TOTAL:	**164**	**100.0**	**167**	**100.0**	**+1.8**	**-**	**-**

Source: Centre Category Reports, Experian (2008 and 2012)

Table 7.2 **Diversity of Uses (Floorspace)**

Operator Type	April 2008		January 2012		% Change	2008	2012
	Area (m^2)	% of Total	Area (m^2)	% of Total		Index (v.UK average)	
Comparison	8,742	33.09	10,303	34.03	+17.9	85	93
Convenience	4,246	16.07	7,042	23.26	+65.9	63	162
Retail Service	2,090	7.91	2,360	7.79	+12.9	116	108
Leisure Services	5,407	20.46	6,708	22.15	+24.1	91	98
Financial Services	2,871	10.86	2,443	8.07	-14.9	120	97
Vacancies	3,066	11.6	1,421	4.69	-53.7	138	46
TOTAL:	**26,421**	**100.0**	**30,277**	**100.0**	**+14.6**	**-**	**-**

Source: Centre Category Reports, Experian (2008 and 2012)

7.6 As the tables show there were 167 retail and service units (Class A1-A5) including vacant outlets in Kenilworth town centre in 2012, trading from a total ground-floor footprint floorspace of 30,227m^2. There has been a slight increase in the number of outlets since 2008 (+3 outlets), but a more significant increase in the total quantum of floorspace (+3,856m^2). The increase in floorspace is mainly explained by the Talisman Square redevelopment.

7.7 The following provides a more detailed assessment of the changes in the provision of the different types of retail and service provision in the town centre.

Comparison Provision

7.8 Kenilworth has above average provision of comparison goods outlets and its floorspace has also increased by +17.9% since 2008, mainly due to the redevelopment of Talisman Square. While this represents an improvement of comparison goods retail offer for Kenilworth, current floorspace provision remains below the national average for all centres covered by Experian of 36.6%.

Convenience Provision

7.9 Kenilworth benefits from a strong food and convenience retail offer, anchored by Waitrose in Talisman Square and Sainsbury's at Warwick Road, along with Iceland. Following the development of Talisman Square, Kenilworth's convenience retail floorspace increased by +65.9%, from 4,246m^2 in 2008 to 7,042m^2 at present. The centre also has a greengrocers and specialist bakery (Sweet as Cakes) that add to its overall food and convenience offer. However, Experian's figures show that the town lacks smaller independent CTNs, convenience stores, fishmongers, and/or delicatessens. These would normally be expected in centres of Kenilworth's size and position in the network and hierarchy of centres.

Commercial Leisure Provision

7.10 Kenilworth town centre has an excellent provision of national multiple and independent eating establishments catering for a wide range of tastes. There are estimated to be some 13 restaurants in the town centre at present and provision is significantly above the national average. Some of the main restaurants include Ego, Zizzi, Pomeroys and Almanack (gastro-pub). A Loch Fyne restaurant is located in Kenilworth (High Street), albeit situated outside the town centre boundary.

Table 7.3 **Eating and Drinking**

Categories	Outlets			Floorspace		
	No. of Outlets	% Total	UK Average (%)	Goad Area (m^2)	% Total (m^2)	UK Average (%)
Eating Offer:						
Cafes	5	2.99	4.06	678	2.24	2.11
Restaurants	13	7.78	4.37	1,988	6.57	3.78
Sub-total	18	10.77	8.43	2,666	8.81	5.89
Drinking Offer:						
Bars & Wine Bars	2	1.2	1.4	632	2.1	1.77
Disco& Nightclubs	0	0.0	0.25	0	0	0.53
Public Houses	3	1.8	2.84	715	2.36	3.77
Sub-Total	5	3	4.49	1,347	4.46	6.07
Other:						
Fast Food & Take Away	4	2.4	5.38	334	1.1	2.57
TOTAL:	**28**	**16.17**	**18.30**	**4,347**	**14.37**	**14.53**

Source: Centre Category Report, Experian (June 2012)

Note: Experian incorrectly recorded a nightclub at 7 Millar Court. The table has been updated to exclude this.

7.11 In terms of drinking establishments and late night venues, the public house provision in the town centre appears to be more limited. However, we understand that there are a number of additional public houses located outside, but close to the defined town centre. In terms of A5 uses, it is noted that there are no branded fast-food or take-away outlets in Kenilworth, such as McDonalds, Burger King and KFC.

7.12 There is, however, a good representation of cafes and coffee shops. This includes a Starbucks, operating from ground-floor of the Holiday Inn, and Costa Coffee (Talisman Square).

Other Uses & Attractions

7.13 There are four hotel and guest houses in the town centre. This is the same as in 2008 and provision is above the national average. The hotel accommodation is dominated by the 108-bed Holiday Inn, and also includes The Grand Hotel, Abbey Guest House and The Kenilworth (boutique hotel and cocktail bar). Kenilworth has two community theatres located close to the town centre; Talisman Theatre at Barrow Road, and Priory Theatre at Rosemary Hill. In addition to its retail and service function, the centre has a diverse range of other activities, including:

- youth and community centre
- dwellings
- doctor's surgeries
- veterinary surgery
- theatre
- community hall
- place of worship
- library / tourist information centre
- police station
- sports centre

7.14 As part of the proposed Kenilworth Town Centre Action Plan a number of investment proposals are identified, including the development of a new civic centre at Jubilee House. The proposal would include a new theatre and health centre.

MULTIPLE REPRESENTATION AND DEMAND

7.15 According to Experian there are 54 national multiple operators (Classes A1-A5) in Kenilworth town centre trading from 17,800m^2 (see table below). This is broadly the same as the provision in 2008 (i.e. 55 multiples).

Table 7.4 **National Multiple Representation**

Categories	Outlets			Floorspace		
	No. of Outlets	% of Total Outlets	UK Average (%)	Area (m^2)	% of Total (m^2)	UK Average (%)
Comparison	20	37.04	43.44	5,137	28.86	48.18
Convenience	6	11.11	10.95	6,615	37.16	22.3
Retail Service	7	12.96	9.99	725	4.07	5.01
Leisure Services	12	22.22	19.52	3,920	22.03	15.52
Financial Services	9	16.67	16.09	1,403	7.88	8.99
TOTAL:	**54**	**100**	**100**	**17,800**	**100**	**100**

Source: Centre Category Report, Experian (2012)

7.16 The town's multiples currently represent 32% of all outlets and 59% of total floorspace. Notably, the proportion of floorspace occupied by national multipliers has increased by one-third since the 2009 RLS. This is mainly explained by the new Waitrose floorspace and the recent addition of a 99p Store (The Square). Overall Kenilworth has a good multiple offer for a centre of its size and role in the retail hierarchy.

7.17 In terms of requirements from retailers and service businesses for representation in Kenilworth, the latest CoStar report that there are seven operators with a recorded interest (this is the same as recorded in 2008). Key retailers with requirements include Heron Frozen Foods (278-465m^2), Poundland (418-929m^2), Card Factory (93-232m^2), Glitz Accezzoriez (37-93m^2) and Hatton Goldsmiths (9-46m^2). While the number of requirements may appear low, particularly from comparison goods retailers, this is typical for a centre of Kenilworth's size. Another factor is that many recent requirements have been satisfied by the redevelopment of Talisman Square.

VACANCY LEVELS

7.18 According to Experian there were some 13 units were vacant in January 2012, trading from a total floorspace of 1,421m^2. This represents a vacancy level of 7.19% for total outlets, which is well below the UK average (12.22%); and a vacancy level for total floorspace of 4.69%, which is also significantly below the national average of 10.16%.

7.19 Comparisons with the 2008 Experian data indicate a small fall in vacant outlets since 2008 (i.e. one outlet) and a more significant reduction in the total quantum of vacant floorspace. This is explained by the occupation of one of the town's larger vacant units. SP's recent survey of the town centre in January 2013 identified that the number of vacant outlets had fallen further, to just five units within the primary shopping area.

ACCESSIBILITY & PEDESTRIAN FOOTFALL

7.20 Kenilworth benefits from good accessibility by car and other modes of transport. It has good connections with the main regional roads (A46 and A452), which, in turn, link to the motorway network (M6, M40 and M42).

7.21 The town also has a good choice and number of car parking spaces. As the table below shows, there are 815 spaces in the town's four main car parks. This includes parking provision associated with the temporary short stay car park at Talisman Square. There is also a good provision of on-street parking facilities, which are subject to charges between 08.00 and 20.00 seven days a week, with a maximum stay of two hours. The car parking facilities are all covered by 'pay and display'.

Table 7.5 **Car parking facilities**

Location	Type	Capacity
Waitrose	Short Stay	288
Abbey End	Long Stay	227
Sainsbury's	Short Stay	140
Square West	Long Stay	120
Talisman Square	Short Stay (Temporary)	44
TOTAL:		**819**

Source: Warwick District Council

7.22 There are also numerous bus routes that pass through the centre, that provide regular services to surrounding towns and villages in the catchment. This includes the main bus facility on Abbey End at the northern end of Warwick Road. Also, whilst Kenilworth does not have a dedicated railway station (the nearest station is Coventry some nine kilometres away), there is the opportunity to connect to Birmingham (20 minutes) and London (one hour). We also understand that there are plans to reintroduce a station facility at Priory Road to be funded by the Department of Transport and Warwickshire County Council. It is anticipated that the station will open in December 2016 providing services to Coventry and Royal Leamington Spa, with services to Birmingham supported by 2019.

7.23 The town centre does suffer from high levels of traffic and the movement of heavy goods vehicles along Warwick Road. Consideration therefore needs to be given to what improvements can be made to help direct heavy goods vehicles away from Warwick Road. Increased walking and cycling to and from the town and the increased use of public transport should also be promoted. A co-ordinated approach to public parking and traffic management should also be contemplated.

7.24 As for Royal Leamington Spa and Warwick, the Council have been monitoring footfall in Kenilworth Town Centre since 1999 across up to 23 locations. The surveys have been carried out by Pedestrian Market Research Services Limited (PMRS) on behalf of Warwick District Council and the results are set out in **Appendix 6**. In summary, there has been a reduction in average pedestrian counts since 2009 for the town centre (-14.6%). The timeline for the survey also shows the impact of Talisman Square on footfall levels and peak flows; between 1999 and 2008 average footfall fell by -38%, but since Talisman Square opened there has been a +24% increase. As for the other town centres, the changes in footfall levels are as positive indicator of the relative performance of the town centre, particularly when considered against the backdrop of the economic downturn and increased competition from other higher order centres and out-of-centre shopping locations. Kenilworth's strength lies with its strong convenience retail offer, which in turn helps to support other town centre businesses and services through linked trips and expenditure.

ENVIRONMENTAL QUALITY

7.25 Kenilworth is an attractive town centre. It has benefitted from a range of environmental improvements in recent years, including the investment and refurbishment associated with the redevelopment of Talisman Square. The scheme is comprehensively pedestrianised, and provides a safe and pleasant environment. This, in turn, has provided a pleasant focal point in the town centre. Similarly, residential and commercial development at Abbey End has increased the attractiveness of this end of the town centre.

7.26 The town centre has a good provision of street furniture, landscaping, open spaces, public toilets, litter bins and cycle racks. It evident that the centre is well maintained with investment in decorative planting and no obvious visual signs of dereliction, litter, graffiti, neglect or long-term vacancy. Overall, we consider the centre to be environmentally-friendly and attractive.

SUMMARY

7.27 In summary Kenilworth is a healthy and attractive town centre. Although it will never compete with the higher order centres (such as Royal Leamington Spa) for comparison and fashion shopping, it appears to be performing well at its level in the shopping hierarchy, meeting the more frequent day-to-day needs of its local catchment population, as well as visitors and tourists to the area. The centre's overall vitality and viability has also been strengthened by the investment in and redevelopment of Talisman Square over recent years, anchored by a new Waitrose store.

7.28 Overall the town centre has a relatively good range of national multiple retailers; a good choice of restaurants; low and falling vacancy levels since 2008; and an attractive town centre environment. The town centre's overall vitality and viability is underpinned by its foodstore offer, which generate the frequent trips and footfall needed to support other shops, businesses and services. Therefore its future performance and prospects are inextricably linked to its anchor foodstores. Fundamentally, at this level in the shopping hierarchy, the maintenance and enhancement of the food shopping function is of paramount importance.

7.29 Notwithstanding its overall positive health, there are concerns as to the limited amount of investment in traffic management in the centre, which could result in the town losing its competitive edge and attractiveness. New investment is therefore needed for the town centre to remain attractive and competitive.

8.0 ECONOMIC CAPACITY ASSESSMENT

8.1 This section sets out the updated quantitative need (retail capacity) assessment for new comparison and convenience goods floorspace in Warwick District and its main centres over the development plan period, up to 2029[22]. This assessment is based on the market shares derived from the household telephone interview survey conducted in July 2013. It supersedes the previous retail capacity forecasts identified by the 2009 Warwick RLS and the 2013 'Refresh'.

THE CREATE CAPACITY MODEL

8.2 The **CREAT^{e}** model has been specifically developed by Strategic Perspectives over a number of years to assess the capacity for, and impact of new retail (convenience and comparison goods) development and investment. The (Excel-based) model adopts a transparent 'step-by-step' approach in which all the key assumptions and forecasts can be easily tested, in accordance with good practice advice. The model draws on the 'baseline' (2013) market share analysis derived from the updated household telephone interview survey to help to inform the assessment of the current turnover and trading performance of existing centres, shops and stores.

8.3 In simple terms the quantitative capacity for new retail floorspace is usually derived from the forecast growth in population and expenditure over time, after making an allowance for new commitments[23] and the increased 'productivity' (or 'efficiency') of all existing and new floorspace. Capacity can also occur where there is a clearly identified "*imbalance*" between the turnover of existing facilities and the current level of expenditure in an area[24].

8.4 The key assumptions and forecasts underpinning the **CREAT^{e}** model are based on robust data, research and best practice. In this case:

- The **catchment/study area** defined for the purpose of this retail assessment is the same as used for the 2009 RLS and earlier retail studies (see **Section 4**).
- The average **retail expenditure per capita levels** for both convenience and comparison goods for the ten study zones have been derived from the latest *Retail Planner Reports* produced using our in-house Experian MMG3 Geographic Information System (GIS). All expenditure and turnover figures are expressed in 2011 prices.

[22] The base year for this assessment is 2013 and it covers the interim years of 2018 and 2023. It also provides a long range forecast up to 2031.

[23] Commitments include retail floorspace with planning permission, under construction and/or opened after the household survey was conducted.

[24] For example where there is clear evidence of significant 'leakage' of shoppers and retail expenditure from defined catchment areas to less convenient and sustainable shopping destinations and/or where there is evidence that existing centres/stores are significantly over-trading based on a range of quantitative and qualitative indicators (e.g. where stores are congested and over-crowded throughout the shopping week).

- The year-on-year retail **expenditure growth forecasts** have been informed by Experian's latest *Retail Planner Briefing Note 11* (October 2013).
- An allowance has been made for expenditure on 'non-store' retailing (otherwise referred to as ***Special Forms of Trading***)[25] over the forecast period. This has also been informed by Experian's latest *Retail Planner Briefing Note*.
- An allowance has been made for the growth in the **'productivity'** (or 'efficiency') of existing and planned/committed floorspace over the forecast period in accordance with national policy and best practice.

8.5 For the purpose of this strategic retail assessment we have first identified the 'baseline' capacity for new retail (convenience and comparison) floorspace based on the latest population projections sourced from Experian.

8.6 We have then tested the 'sensitivity' of the capacity forecasts based on the population projections provided by the local planning authority which have informed the planned housing allocations in the District over the development plan period. At the time of preparing this study the updated joint SHMAA identified an overall housing requirement for Warwick District of 12,900.

8.7 It should be noted at the outset that capacity forecasts carried out over a long period of time should be treated with caution due to the impact of economic, demographic and market trends on the key assumptions and forecasts. As a result we advise the Council that greater weight should be placed on the short term forecasts carried out over a three-five year period in accordance with the advice set out in the NPPG. Notwithstanding this, account should also necessarily be taken of the forecast growth and need for new retail floorspace over the development plan period to help inform plan-making and site allocations.

8.8 The 'baseline' capacity tabulations for convenience goods and comparison goods are set out in **Appendix 7** and in **Appendix 8** respectively. The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the **CREAT^e^** Model are described in more detail below.

POPULATION & EXPENDITURE FORECASTS

Population Projections

8.9 The 'baseline' capacity scenario draws on the latest population projections published by Experian. These are based on Census population figures and take account of the key 'drivers' of population change (including birth and death rates and net migration).

8.10 As **Table 1** shows, the total study area population is estimated to be 303,518 in 2013 and is projected to increase by 17.4% to 348,099 by 2029. Of this total study area population almost 41% (123,431) currently live in the Leamington (Zones 1 & 3),

[25] SFT is made up of purchases that generally occur outside of shops such as, for example, via mail order, vending machines, telephone sales, market stalls and the Internet.

Warwick (Zone 2) and Kenilworth (Zones 7) 'core' residential zones. This 'core' population is forecast to increase by 17.4%, to 142,757 by 2029.

Average Expenditure and Special Forms of Trading

8.11 Table 2 sets out the average expenditure per capita estimates on a zone-by-zone basis for both convenience goods (**Appendix 7**) and comparison goods (**Appendix 8**) in 2013 (2011 prices). The differences between the average expenditure per capita figures reflect the different socio-economic characteristics of the resident population in each zone.

8.12 In accordance with standard practice an allowance for Special Forms of Trading (SFT) has been made at the base year and over the forecast period.

8.13 As described in **Section 3**, Experian's latest *Retail Planner Briefing Note* forecasts that non-store comparison goods sales will increase from 14.4% in 2013 to 21.2% by 2029, and from 8.3% to 18.5% for convenience goods. Notwithstanding Experian's research, there is uncertainty as to the likely growth in SFT over time (and specifically Internet shopping), and the resultant impact on the capacity/demand for new retail (physical) floorspace. It is Experian's view that the overall impact on traditional store-based shopping will be diluted by the fact that a proportion of online sales are sourced from regular stores rather than dedicated warehouses. Furthermore, Experian state that store-based expenditure per capita is still forecast to increase, even if this growth is "*outpaced*" by non-store retailing. The assumption therefore is that Internet shopping and traditional store-based shopping could be mutually beneficial. This is illustrated by the growth of *'click and collect'* and *'multi-channel'* retailing, where shopping via the Internet is driving the demand for traditional ('physical') outlets and showrooms.

8.14 In this context we have used Experian's 'adjusted' SFT forecasts for the purpose of this assessment. It has been assumed that some 25% of SFT comparison goods sales and 70% of convenience goods sales will continue to be sourced from traditional ('physical') retail space over the forecast period. On this basis we have made an allowance for the growth in SFT for comparison goods from 10.8% to 16.5% between 2013 and 2029, and from 2.5% to 5.5% for convenience goods over the same period. However it is clear that if the growth in Internet shopping is stronger than forecast by Experian, and a smaller proportion of online retail sales are sourced from existing shops, then there will be a reduction in the total retail expenditure capacity available to support existing and new retail floorspace. We therefore advise the Council that they should regularly monitor the research and update the forecast growth rates when necessary.

Expenditure Growth Forecasts

8.15 The growth in average expenditure per capita levels up to 2031 has been informed by the forecasts set out in Experian's latest *Retail Planner Briefing Note* (Figure 1a). Experian's forecasts show limited growth in convenience goods expenditure over the short term up to 2015, with growth thereafter averaging +0.8% per annum. For comparison goods there is stronger forecast annual growth over the short term of +2.3% in 2014 and +2.8% in 2015, with growth increasing to +3% up to 2031 (also see **Section 3**).

Total Available Expenditure

8.16 Total available retail expenditure in the study area and zones is derived by multiplying the population and average expenditure per capita levels together.

8.17 Table 3 (**Appendix 7**) shows that the total available **convenience goods** expenditure in the study area is forecast to increase from £582.9m in 2013 to £721.7m by 2029. This is equivalent to a total growth of +£138.8m (+23.8%) over the development plan period.

8.18 For **comparison goods** total expenditure is forecast to increase from £888.7m to £1,500m between 2013 and 2029 (see Table 3, **Appendix 8**), which represents a substantial growth of +£611.3m (+68.8%).

8.19 The forecasts show that the growth in comparison goods expenditure significantly outstrips convenience goods expenditure. All things being equal, this means that there could be greater potential capacity for new comparison goods floorspace over the forecast period, assuming no changes in the key forecasts (i.e. expenditure, population and special forms of trading) and depending on the level of new retail commitments.

TURNOVER ESTIMATES

8.20 Having established the total available expenditure in the study area (i.e. the demand side of the economic assessment), the next step is to estimate the turnover of the District's main centres and stores. It is common practice for retail assessments to determine turnover levels using two different approaches:

- The first approach identifies the '**potential**' (or 'actual') turnovers of all retail floorspace based on the allocation of all available expenditure within the study area and zones to existing centres/stores based on the survey-derived market share analysis.
- The second approach assesses the **'benchmark'** turnover performance of centres and stores based on published national company averages (where available) and other research evidence.

8.21 The following briefly sets out the results of the different turnover assessments and the implications for the retail capacity analysis.

'Potential' Turnover

8.22 The 'potential' turnover estimates for all centres/stores at the base year are set out in Table 5 (**Appendix 7**) for convenience goods and Table 5 (**Appendix 8**) for comparison goods.

8.23 Tables 6-10 set out the growth in 'potential' turnovers over the forecast period for convenience and comparison goods assuming no change in market shares. Although this is a standard approach used to inform retail assessments, it does not model the potential uplift in retention levels and capacity that can occur within catchment areas following new retail development, or conversely the fall in retention levels and capacity that may arise due to the impact of new retail floorspace in competing centres and shopping locations.

8.24 The turnovers derived from the market share analysis are only based on the expenditure drawn from within the defined study area and do not therefore make any allowance for the potential "*inflow*" (trade draw) from outside the study area. For the purpose of this strategic retail assessment we have assumed the following "*inflows*" based on the available evidence and good practice:

- For **convenience goods**, we have assumed the District's foodstores do not draw any trips or convenience goods expenditure from outside the study area. This is based on the wide geographic area covered by the study area; the significant choice of competing foodstore provision both within and outside the District; and the fact that people normally shop in the most convenient and accessible foodstore closest to their home and/or place of work.
- For **comparison goods** we have made an allowance for the fact that the District's main centres will draw a proportion of their turnovers from people living outside the study area. This takes account of retail spend by day-trippers and visitors/tourists to the area, as well from commuters who live outside the study area. In this case we have assumed that Royal Leamington Spa will draw at least 10% of its turnover from outside the study area, and both Warwick and Kenilworth will draw 5%.

8.25 Table 11 (**Appendix 7**) sets out the total 'potential' convenience goods turnovers of the main centres/stores based on the market share and trade draw analysis.

8.26 Table 11 (**Appendix 8**) sets out the equivalent turnover estimates and forecasts for comparison goods.

'Benchmark' Turnover

8.27 The 'benchmark' convenience goods turnover estimates are set out in full in Table 12 (**Appendix 7**). For convenience goods retailing, the sales areas and company average turnover levels (or 'average sales densities') for the main foodstore operators have been derived from published research, recent planning applications and previous retail assessments. The 'benchmark' turnovers have then been projected forward based on an allowance for the increased 'productivity' of all existing floorspace, in accordance with national policy advice and good practice.

8.28 Table 12 (**Appendix 8**) sets out the comparison goods sales area of existing centres and stores, and their likely average sales densities, based on informed judgements. However, it should be noted that it is more difficult to accurately identify sales areas and 'benchmark' turnover estimates for town centres, as the national and local evidence is not as readily available or as robust as for convenience goods retailing. In this case we have necessarily extrapolated the comparison goods sales areas for the District's main centres from the Experian Goad 'footprint' floorspace figures. The assumed average sales densities for the main centres are informed by a range of indicators, including the scale and quality of their comparison goods retail offer, and their relative roles as comparison goods shopping destinations at the local and sub-regional level.

'Potential' v 'Benchmark' Turnover

8.29 For retail assessments the extent to which 'potential' turnovers exceed 'benchmark' turnover levels may be a qualitative indicator of need, and in some cases can inform quantitative need considerations. Commonly referred to as *"overtrading"*, it may reflect the poor range of existing facilities in an area, or it may be due to a limited choice of stores and a lack of new floorspace within a locality. However 'benchmarks' should not be used prescriptively or in isolation to indicate a measure of need, as operators in different locations will trade significantly above or below their company averages depending on a range of factors. Given the inherent margins of error involved in this type of exercise it is accepted that the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Other supporting evidence can include in-centre health checks and any signs of in-store congestion and/or queuing at checkouts and in car parks.

8.30 Against this background we have compared the 'potential' and 'benchmark' turnovers for existing convenience and comparison goods retailing in the District at 2013 to determine whether there is any quantitative evidence of residual ('pent up') capacity for new retail floorspace.

8.31 For **convenience goods**, the turnover estimates show that all the District's centres and stores are achieving a total (survey-derived) 'potential' turnover of some £287.7m in 2013, which is some £37.9m below the total estimated 'benchmark' turnover figure of £325.6m. On this basis there is no quantitative evidence of 'pent up' capacity at the base year for new retail floorspace. This 'baseline' assessment is further underlined by the significant provision and choice of major foodstores in the District, which has recently been strengthened by the new out-of-centre Morrisons, Aldi and Lidl stores.

8.32 For **comparison goods** retailing, it is more difficult to accurately assess whether existing centres are trading above or below expectations due to the more limited evidence detailing accurate sales areas and turnover levels. Notwithstanding this caveat, the retail assessment indicates that the total (survey-derived) 'potential' turnover of all centres and non-food stores in the District of £416.7m is only slightly below their total estimated 'benchmark' turnover of £419.6m. In other words Warwick District's comparison goods retail market appears to be broadly in "*equilibrium*" at 2013.

8.33 Looking at the turnover performance of the District's main centres and out-of-centre stores in more detail indicates that Royal Leamington Spa's 'potential' turnover of £275.2m is some £32.4m higher than the town's estimated 'benchmark' turnover of circa £242.8m. Although it does not necessarily follow that this 'residual' expenditure directly reflects a current 'need' for new retail floorspace in Royal Leamington Spa, it is something that will need to be carefully considered when assessing the overall capacity for new retail floorspace in the town centre.

RETAIL COMMITMENTS

8.34 In terms of outstanding retail commitments in the study area, the only permitted foodstore we are aware of is the small **Co-Op** on land adjacent to Reardon Court Local Centre, to the north of Warwick Town Centre (see Table 13, **Appendix 7**). The convenience store has a gross floorspace of 440m^2 and an estimated sales area of 328m^2 net, of which 250m^2 is to be set aside for convenience goods retailing. Based on an average sales level of £7,500 per m^2 it is assumed the Co-Op store will achieve a 'benchmark' convenience goods turnover of circa £1.9m. The store is also forecast to achieve a comparison goods turnover of circa £0.5m. In addition, the conversion and extension of the former The Oak public house on Radford Road to a Sainsbury's Local will create 220m^2 of net convenience floorspace in an out-of-centre location. Based on company averages for Sainsbury's, it is forecast that the store will achieve a convenience turnover of circa £2.8m.

8.35 Although there were no outstanding planning permissions for new comparison goods floorspace in Warwick District at the time of preparing this retail assessment, we understand that the planning application for **Clarendon Arcade** is scheduled to be submitted in Spring 2014. As described previously, Wilson Bowden Developments Limited (the commercial development arm of Barratt Developments plc) and Warwick District Council are working in partnership to deliver a new retail and leisure scheme on the 0.8ha Chandos Street Car Park site and adjoining land in the heart of Royal Leamington Spa. Although it is not treated as a retail commitment for the purpose of this strategic study, it does nevertheless represent an important material consideration when assessing the need for new retail floorspace and leisure uses in the District and its main centre.

'BASELINE' CAPACITY FORECASTS

Convenience Goods

8.36 Table 14 (**Appendix 7**) sets out and explains the key steps underpinning the convenience goods capacity assessment. As the summary table below shows there is no forecast residual expenditure to support the need for convenience goods floorspace until 2029. This reflects the significant existing provision in the District and the impact of major new foodstore developments over the last 12 months, principally Morrisons.

Table 8.1 **Convenience Goods Capacity**

	2013	2018	2023	2029	2031
Residual Expenditure (£m):	-£42.2	-£32.2	-£17.8	£2.3	£7.7
Floorspace Capacity (m^2 net):	**-3,375**	**-2,520**	**-1,360**	**170**	**565**

Source: Table 15, Appendix 7.

8.37 In order to convert the residual expenditure (£m) into a net sales figure (m^2) we have assumed a superstore format retailer will achieve an average sales density in the region of £12,500 per m^2 in 2013. This is based on the "*average*" sales performance of the 'top 6' foodstore operators (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and Marks & Spencer) and results in the capacity for 170m^2 net of new convenience goods floorspace by 2029.

8.38 Although we have not prepared a forecast for smaller supermarkets and deep discounters, these operators usually trade at approximately half the average sales levels of mainstream retailers. It therefore follows that the capacity for new supermarket and discounter floorspace at 2029 will be approximately 370m^2 net.

Comparison Goods

8.39 Table 14 (**Appendix 8**) sets out and explains the detailed steps in the comparison goods capacity assessment. The (global) residual expenditure and floorspace capacity forecasts are summarised in the table below.

Table 8.2 **Comparison Goods Capacity**

	2013	2018	2023	2029	2031
Residual Expenditure (£m):	-£3.6	£18.3	£61.0	£133.2	£153.2
Floorspace Capacity (m^2 net):	**-600**	**2,760**	**8,340**	**16,180**	**17,910**

Source: Table 14, **Appendix 8** (Steps 5 & 6).
Note: Floorspace figures rounded.

8.40 There is no residual expenditure capacity at the base year. Over the development plan period the capacity for new comparison goods floorspace is forecast to increase to 16,180m^2 net based on the growth in population and expenditure, and after taking into account all known retail commitments.

8.41 The forecast expenditure capacity has been converted into a net retail sales area based on an assumed average sales density for all new non-food floorspace of circa £6,000 per m^2 at the base year. This is broadly equivalent to the average sales performance of new comparison goods retail floorspace in prime shopping locations. Notwithstanding this, average sales levels will vary depending on a range of factors[26]. The Council should therefore be aware that the application of different turnover figures will have a direct impact on the capacity forecasts. For example, a lower average sales density will increase the capacity for new comparison goods floorspace. This will be a material consideration for the local planning authority when assessing and determining applications for new retail floorspace with named operators.

8.42 We have also assessed the capacity generated by the District's three main centres and other floorspace based on their trading performance at the base year (i.e. 'potential' and 'benchmark' turnovers). The results are set out in **Tables 15-17** (**Appendix 8**) and summarised below.

Table 8.3 **Warwick District's Centres – Comparison floorspace Capacity Forecasts**

	2013	2018	2023	2029		2031
RESIDUAL EXPENDITURE (£m):						
Royal Leamington Spa Town Centre	£32.4	£50.8	£83.6	£137.3		£152.9
Warwick Town Centre	-£13.7	-£13.6	-£12.2	-£8.6		-£7.9
Kenilworth Town Centre	-£5.6	-£5.5	-£4.2	-£1.2		-£0.6
FLOORSPACE CAPACITY (m^2 net):						
Royal Leamington Spa Town Centre	5,364	7,673	11,431	16,674		17,842
Warwick Town Centre	-2,286	-2,060	-1,666	-1,049		-922
Kenilworth Town Centre	-934	-838	-570	-144		-69

Source: Tables 15-17, Appendix 8 (Steps 5 & 6)

8.43 The table shows that there is potential floorspace capacity (5,364m^2 net) in Royal Leamington Spa at 2013 based on the difference between the centre's (survey-derived) 'potential' turnover and its estimated 'benchmark' turnover. Over the development plan period the capacity for new comparison goods floorspace is forecast to increase to 16,674m^2 net by 2029. Alternatively, if it is assumed that there is no 'pent-up' residual expenditure at the base year, then the capacity for new retail floorspace over the development plan period will be lower at 11,310m^2 net (i.e. 16,674m^2 minus 5,364m^2).

[26] This includes the type of goods sold by the retailer, the location and quality of the retail floorspace, and the size and affluence of the catchment population. For example, published trading figures show that 'bulky goods' retailers in the DIY, carpet and furniture sectors generally achieve lower average sales levels of between £1,500 and £4,000 per m^2, whereas large format electrical goods retailers can achieve much higher average sales levels of £7,000 per m^2 and above.

8.44 The forecasts also show no capacity for new retail floorspace in Warwick or Kenilworth Town Centres over the development plan period. However, this does not mean that new retail development and investment should not be considered and promoted in both centres over the development plan period, subject to market demand and the availability of suitable and viable central sites. This should also be considered in the context of the findings of the health check assessments which identified a qualitative need to enhance the retail provision in both centres over time to help maintain their attraction and important roles in the District's retail hierarchy; particularly in the face of increased competition from out-of-centre retailing and competing centres both within and outside the District, as well as the increased threat of online shopping.

8.45 Finally, as stated in Section 1 to this study, capacity forecasts beyond a five year period should be treated with caution.

'SENSITIVITY' TESTS

8.46 At the time of preparing this study the updated joint SHMAA identified an overall housing requirement for Warwick District of 12,900. The updated housing need forecasts have been derived from the population projections set out in the table below.

Table 8.4 **Population Projections – Warwick District Council and Experian**

	2013	2018	2023	2029	2031	% Growth: 2013-29
Warwick District Council	139,958	145,701	151,832	159,199	161,594	15.58%
Experian:	139,290	146,053	152,330	159,965	162,222	17.32%

Source: Warwick District Council population projections based on housing delivery and Experian population projections.

8.47 The table shows that the 2029 population forecast of 159,199 used to inform the SHMAA is only marginally lower than the 159,965 projected by Experian (i.e. a difference of 766 people). Between 2013 and 2029 Experian forecast a slightly higher population growth of 17.3%, compared with the 15.6% growth assumed for the purpose of the updated SHMAA.

8.48 Given that there is only a marginal difference between the different population projections, the difference between the capacity forecasts will also be marginal. We therefore consider that the 'baseline' capacity forecasts using Experian's population figures provide a robust and sound basis for assessing the need for new retail floorspace in the District and its main centres.

SUMMARY

8.49 In summary, the capacity forecasts for new retail (convenience and comparison goods) floorspace in the District and its main centres over the development plan period (up to 2029) are based on the growth in population and expenditure using Experian's forecasts and take into account all extant permissions identified by the local planning authority at the time of preparing this study.

8.50 The analysis has identified limited capacity for new convenience goods ('superstore format') floorspace by 2029. This reflects the good provision and choice of foodstores in the District. This provision has been further strengthened in recent years by the opening of modern new out-of-centre stores; principally the new Morrisons store at the former Ford Foundry factory site on Old Warwick Road.

8.51 Notwithstanding this, we consider that there remains a qualitative need for a new foodstore in Royal Leamington Spa Town Centre either within or on the edge of its primary shopping area to help anchor its overall convenience offer in the face of the strong and increased competition from out-of-centre stores. However, this will be dependent on market demand and the identification and delivery of a suitable and viable site in the town centre.

8.52 For comparison goods there is a District-wide ('global') capacity for 16,180m^2 net of new retail floorspace by 2029. This represents a reduction in the quantum of retail floorspace capacity identified in previous retail studies. This is explained by a range of factors including, more subdued expenditure growth forecasts; the increased market share of special forms of trading (and specifically online shopping); the recent development of new comparison goods retail floorspace, particularly in out-of-centre locations as part of new superstore developments; and the reduction in the market shares of the District's three main town centres since 2009 as identified by the recent household survey.

8.53 Although the quantitative analysis indicates that Warwick District's retail market is broadly in 'equilibrium' at the base year, the turnover evidence does suggest that there is currently 'pent up' residual expenditure in Royal Leamington Spa that could possibly support additional new retail floorspace. On this basis there is higher forecast capacity for 16,670m^2 net of new comparison goods floorspace in the town centre by 2029. Assuming no 'pent up' residual expenditure at the base year would result in a lower floorspace capacity of 11,310m^2 net. The capacity for new comparison goods floorspace in Royal Leamington Spa is also lower than previous forecasts for the reasons set out above. Notwithstanding this, the capacity forecasts are based on a constant market share approach and it is possible that major new retail-led development in the town centre could increase market shares ('retention levels') and therefore the capacity for new retail floorspace through the claw back of shopping trips and retail expenditure.

8.54 The capacity forecasts identified by this retail assessment should be considered in the context of the advice set out in the NPPF (paragraph 23), which states that *"it is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability"*. The NPPG provides further clarification on this matter and states that the potential for centres to accommodate new development and different types of development should cover a three-five year period, but should also take the lifetime of the Local Plan into account.

8.55 Although the comparison goods floorspace of the Clarendon Arcade scheme in Royal Leamington Spa had not been fixed at the time of finalising this study, it is likely that it will meet all the forecast District-wide capacity in a highly sustainable town centre location over the lifetime of the development plan. This is in accordance with national and local plan policy objectives which seek to focus new retail-led development in town centres first.

8.56 In conclusion, we consider that all the forecast capacity for new comparison goods retail floorspace over the development plan period can and should be accommodated in Royal Leamington Spa Town Centre as a priority to help maintain and improve its overall vitality and viability, particularly in the face of growing competition from out-of-centre shopping facilities, other centres and online shopping.

8.57 Although no capacity has been identified for new retail floorspace in Warwick or Kenilworth Town Centres over the development plan period, we nevertheless advise that the local planning authority should explore and identify opportunities to improve the scale and quality of the retail offer in these important town centres. This will help to maintain and enhance their overall vitality and viability in the future, particularly as they have both experienced a decline in their market shares and competitive position over recent years due to the impact of other shopping locations.

8.58 Finally, it is important to restate that these capacity forecasts should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, and the growth in retail spending, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts by Experian suggest, then this will reduce the future demand and capacity for new 'physical' space over the long term.

9.0 LEISURE 'GAP' ASSESSMENT

9.1 Leisure uses can make a significant contribution to a town centre's vitality and viability. A good provision and choice of leisure facilities and uses can help to increase '*dwell times*', footfall and turnover, with significant benefits for both daytime and evening economies. However, the commercial leisure sector is highly complex and dynamic. As a result, forecasting the growth of this sector and identifying the need for new facilities is more complicated than for retailing, as the commercial leisure uses are particularly sensitive to changes in economic, population, lifestyle and fashion trends. As a result the approaches developed to forecast the need for new commercial leisure floorspace and uses are less sophisticated than for retailing.

9.2 The NPPF recommends that need assessments for new leisure uses and floorspace should take account of both quantitative and qualitative considerations (paragraph 161). In this context our analysis therefore focuses on the following key elements:

- a review of the key trends driving market demand in the leisure sector over the last 10-15 years;
- an audit of current commercial leisure uses in the District (both town and out-of-centre) to help identify any potential 'gaps' in provision;
- a review of the results of the household survey to understand current commercial leisure participation rates and preferences in the defined Study Area; and
- a broad economic assessment of the need for new additional leisure facilities across the District based on different approaches.

9.3 For the purpose of our assessment we have necessarily focussed on the main commercial leisure uses that can make a significant contribution to the overall vitality and viability of town centres (i.e. cafés, bars, restaurants, cinemas, healthclubs, bowling alleys, etc.).

LEISURE EXPENDITURE GROWTH

9.4 Like the retail market, the commercial leisure sector has experienced significant growth in consumer and market demand since the mid-1990s, fuelled by a buoyant economy, growing disposable income and low unemployment levels. Although the leisure sector has not been immune to the impact of the recent economic downturn, leisure activities remain an important lifestyle choice for many consumers who are prioritising leisure over other areas of spending.

9.5 The table below shows the UK average expenditure per head on leisure services and the average for the defined study area catchment zones based on Experian data including for Core Zones[27] (Zones 1, 2, 3 & 7). It shows that UK household spending

[27] Core Zones include zones that comprise the District's main centres and environs including Leamington Spa (Zones 1 & 3), Warwick (Zone 2) and Kenilworth (Zone 7).

on leisure services is dominated by the restaurant and cafe category (including pubs), which accounts for circa 62% of total commercial leisure spend. This pattern is broadly repeated across all the zones including the Core Zones (63%).

Table 9.1 **Average Spend on Commercial Leisure Services in 2011 (£ per head)**

	Cultural services	Games of chance	Hairdressing salons & personal grooming	Recreational & sporting services	Restaurants, cafes etc
Zone 1	£301	£165	£97	£134	£1,235
Zone 2	£303	£185	£95	£126	£1,200
Zone 3	£275	£167	£73	£109	£1,111
Zone 4	£299	£175	£105	£133	£1,097
Zone 5	£242	£182	£75	£90	£922
Zone 6	£241	£160	£80	£100	£979
Zone 7	£310	£189	£113	£144	£1,256
Zone 8	£362	£191	£139	£179	£1,427
Zone 9	£316	£205	£117	£136	£1,225
Zone 10	£355	£208	£132	£167	£1,340
TOTAL STUDY AREA	**£300**	**£183**	**£103**	**£132**	**£1,179**
CORE ZONES : 1-3, 7	**£300**	**£180**	**£98**	**£130**	**£1,210**

Source: Experian, 2011 prices.

9.6 The table below shows the most recent leisure spend projections by Experian Business Strategies (EBS) as set out in *Retail Planner Briefing Note 11* (October 2013). EBS forecasts show negative growth in 2012 and 2013, with stronger growth forecast over the longer term of +1.7% per annum. This forecast growth is higher than annual average historic growth rates of +1% for the period 1982-2012.

Table 9.2 **Actual & Forecast Growth in UK Leisure Spend (% per annum)**

	2010	2011	2012	2013	2014	2015	2016-2020	2021-2030
Leisure Spend Growth (%)	2.0	1.3	-0.9	-0.2	0.7	1.4	1.5	1.3

Source: Experian Business Strategies, Retail Planner Briefing Note 11 (October 2013).

9.7 The base year expenditure per capita levels on leisure (Table 9.1) have been projected forward to 2031 by applying Experian's forecast annual growth rates (Table 9.2). The forecast average expenditure per capita levels have then been applied to the projected study area population to identify the total available expenditure on leisure and recreation goods and services. As for the retail assessment, we have assessed total available leisure expenditure based on population projections for the Study Area.

9.8 The table below shows that the Study Area's total leisure expenditure of £562.6m is forecast to increase by one-quarter (£139.9m) to £702.5m in 2023. By 2029, total leisure expenditure will increase to £795m (41%) and to £826.7m (47%) by 2031.

Table 9.3 **Total Available Commercial Leisure Expenditure: 2013 – 2029 (£m)**

	2013	2018	2023	2029	2031
Zone 1	£68.2	£76.1	£84.7	£95.8	£99.6
Zone 2	£59.8	£67.1	£75.1	£85.4	£89.1
Zone 3	£53.8	£62.4	£71.5	£83.1	£87.0
Zone 4	£51.3	£57.9	£65.1	£74.0	£77.0
Zone 5	£40.9	£46.4	£52.2	£59.5	£62.1
Zone 6	£64.3	£71.6	£79.9	£90.3	£94.0
Zone 7	£49.1	£53.4	£58.2	£64.9	£67.0
Zone 8	£62.7	£68.1	£74.5	£82.4	£85.1
Zone 9	£66.6	£74.5	£83.6	£94.7	£98.3
Zone 10	£45.8	£51.4	£57.5	£65.0	£67.6
TOTAL STUDY AREA	**£562.6**	**£628.9**	**£702.5**	**£795.0**	**£826.7**
CORE ZONES : 1-3, 7	**£231.0**	**£259.0**	**£289.6**	**£329.1**	**£342.7**

Source: Table 4 (Appendix 9). All monetary figures are expressed in 2011 prices.

9.9 The table shows that the Core Zones account for 41% of total available commercial leisure expenditure in the Study Area.

9.10 Based on the broad leisure expenditure profile, the majority of the growth in leisure expenditure is likely to be weighted towards eating and drinking out. This highlights the potential to improve the scale and quality of Class A3 uses in town centres over the development plan period, subject to market demand. The aim should be to strengthen the wider mix of leisure uses and attractions in these town centres as a priority, as they are the most convenient and sustainable locations for the majority of the District's residents. It is expected that existing and new leisure uses will be focused in Royal Leamington Spa and Warwick with a smaller level of provision for Kenilworth.

9.11 In the context of this forecast growth in leisure spend, the following commentary identifies the potential 'gaps' in the commercial leisure offer of the District's three main centres, and the likely need for new uses and facilities over the development plan period.

CINEMA

Market Overview

9.12 The significant growth in modern multi-screen cinemas over the last twenty years was fuelled by a number of factors, including the increase in Hollywood 'blockbusters' and new developments in cinema technology (such as digital 'surround-sound' and, most recently, 3-D screen technology). Most multiplexes that opened during the 1990s were located on large out-of-centre and edge-of-town sites, often as part of shopping centres, retail parks or mixed leisure schemes featuring bowling, nightclubs and restaurants (such as, for example, Star City in Birmingham). Cinemas are important anchors for leisure and retail schemes, helping to generate footfall outside of shopping hours, linked trips and spin-off expenditure to other shops and facilities, including cafés and restaurants. Multiplexes have also been particularly successful in attracting shoppers and visitors into 'dead' areas of shopping centres, such as upper levels or the ends of malls.

9.13 Although cinema audiences grew significantly during the 1990s, the UK cinema market has traditionally been dominated by a handful of operators namely Cineworld, Odeon/UCI; Vue (who operate the multiplexes in Westfield's Stratford and White City schemes); and Showcase (the UK arm of National Amusements of the USA). There was significant consolidation in the UK market in 2012 when Odeon acquired the BFI Southbank and a site from AMC, Vue acquired the Apollo cinema chain and Cineworld acquired Picturehouse. From its beginnings in 1995 Cineworld now operates over 100 cinemas in the UK (including Picturehouse) and accounts for more than one quarter (25.9%) of the cinema box office market. Its most recent openings include the 11-screen cinema on the edge of Leigh town centre in Wigan Borough (November 2011) and as part of Quintain's London Designer Outlet in Wembley (2013).

9.14 According to research by Dodona (a specialist consultancy in the cinema industry) there are 769 cinemas in the UK with a total of 3,817 screens, of which approximately three-quarters are multiplexes. The rest of the market is mainly represented by smaller multiplex operators and independents which tend to operate non-multiplex cinemas (i.e. less than five screens) and screens in mixed-use venues (such as arts centres).

9.15 The cinema industry has not been immune from the recession and there have been some closures since 2008, although the majority have been smaller art centre venues rather than the larger chains. Notwithstanding this, the industry generally appears to be in good health. The latest research shows that box office revenue in 2012 in the combined UK and Irish market increased by 2.9% to £1.17bn, although UK admissions fell back by 1.4% to 170m. Overall the cinema sector has remained relatively resilient in the prevailing economic and consumer environment.

9.16 In recent years, cinema operators have also introduced changes to the cinema experience, including premium seating areas and better quality refreshments, such as alcohol and higher quality food. For example, Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas, as well as regular seats. Cineworld has also introduced the *'Screening Room'* concept, characterised by leather chairs and table service. The first 558m^2 *'Screening Room'* cinema opened in June 2011 in the Brewery, Cheltenham and there are plans to roll out more across the UK.

9.17 Research by Dodona indicates that although fewer larger multiplex cinemas are being developed, there has been a growth in smaller (Digital) cinemas to serve smaller catchment areas. These Digital cinemas are more flexible and less "space-hungry" as they do not require the large sloping auditoriums needed to accommodate traditional projectors. There are therefore opportunities for the modern cinema offer to be provided in existing buildings. Examples include the HMV in Wimbledon which has a small Curzon cinema above the store.

Existing Provision and Projected Demand

9.18 **Appendix 9** illustrates the geographical location of cinema provision in Royal Leamington Spa in addition to competing cinema facilities in neighbouring local authorities.

9.19 The District's main commercial cinema is the 6-screen cinema at Portland Place in Royal Leamington Spa. This was formerly operated by Apollo Cinemas and was subsequently acquired by Vue Cinema in January 2013. The cinema includes four 3D-enabled screens with the largest capacity auditorium seating 286 persons. A single cinema auditorium is located within the Royal Spa Centre; a multi-arts centre located on Newbold Terrace in Royal Leamington Spa. The cinema has a more limited commercial function and accommodates small film screenings.

9.20 The results of the household survey indicate that less than half (48%) of the total Study Area's population visit the cinema, which is equivalent to 146,903 people. Of this total, 39.5% normally visit facilities in the District and principally the Vue Cinema (Apollo) in Leamington Spa Town Centre (36%). Cinema facilities in Coventry are also popular; particularly the Warwick Arts Centre (11%) and Showcase at Cross Point Business Park (9.5%). Based on responses within the Core Zones only, the level of patronage to Vue in Royal Leamington Spa increases to 64%.

9.21 With regard to frequency of visits, respondents within the Study Area are more likely to visit the cinema either once a month (23%) or once every two months (31%). Approximately 9% of respondents visit the cinema on a more frequent basis (e.g. once a week or fortnight).

9.22 Data from Dodona (a specialist consultancy in the cinema industry) indicates that the average screen density for cinema provision in the Midlands region is 5.3 screens per

100,000 people (British Film Institute, Statistical Yearbook 2013). The table below assesses the requirement for additional cinema screens in the District based on accepted approaches, drawing on population projection for the Study Area and the market share for existing facilities in the District.

Table 9.4 **Potential Capacity for New Cinema Screens in the District**

	2013	2018	2023	2029	2031
Core Zones Population	123,431	129,773	135,647	142,757	144,897
Cinema Screen Density	5.3	5.3	5.3	5.3	5.3
Cinema Screen Potential	**6.5**	**7**	**7**	**8**	**8**
Existing Screen Provision (District)	7	7	7	7	7

Source: Dodana Research
Notes: Cores zones include Zones 1, 2, 3 & 7.

9.23 The quantitative assessment suggests that there is currently an adequate provision of cinema screens in the District based on average screen densities for the core zones' (Zones 1, 2, 3 & 7) population. However, this does not take account of the population in neighbouring zones that are not well served by cinema facilities. For example, when including population of Zone 4, this increases the cinema screen potential to 8 screens in 2013 and 10 by 2031. It must also be highlighted that demand for new cinema provision is wholly market driven. The type and quality of existing cinema provision will influence the attractiveness of a centre to new cinema operators.

9.24 In our judgement in qualitative terms the existing Vue Cinema is restricted in terms of its location, size and capacity, and it does not reflect the modern requirements of new generation cinema operators. Modern cinema formats have evolved in the last 10 years with venues offering increased screen capacity and a greater reliance on ancillary leisure facilities; in particular food and drink outlets. Consideration should therefore be given to the potential to provide a new modern facility in Leamington Spa town centre, subject to market demand and the impact on the existing Vue Cinema. This would enhance the centre's evening time economy and support other services, including retail and other leisure uses.

EATING AND DRINKING OUT

9.25 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs provide an increasingly important part of a town centre's wider offer and economy. They also complement other town centres uses, particularly shops, offices and cinemas, helping to lengthen 'dwell times' (the time people spend in centres) and increase expenditure as part of the same trip.

Market Overview

9.26 As described previously average household spending on leisure services in the UK is dominated by eating and drinking out. Even in the context of the current economic recession this sector has remained buoyant. In terms of the pub trade, some of the key trends in recent years include:

- A move to more flexible opening hours (resulting from licensing reforms implemented in November 2005), combined with pressures arising from lower alcoholic drink prices (particularly in supermarkets), has resulted in a number of pub operators widening their food and non-alcoholic beverage. This has resulted in the growth of so-called "*gastro-pubs*" as eating-out destinations in competition with more established restaurants.

- Increased consolidation and closures in the pub industry. According to the Campaign for Retail Ale (CAMRA) there have been 5,800 pub closures since 2008[28]. Recent research by CAMRA also suggests that on average between 18 and 26 pubs are closing every week in the UK.

- The sale of pubs for conversion to alternative uses has also increased over recent years, particularly for convenience retailing (e.g. Tesco Express and Sainsbury's Local).

- The Home Office has also introduced a much more aggressive policy towards the pub industry. Powers for local authorities to establish Alcohol Disorder Zones (ADZ) are included in the Violent Crime Reduction Act (2006), which also places a charge on pubs and bars in a designated area to pay for additional policing, environmental and other services in the neighbourhood. This increase in costs is also placing further pressure on the profit margins of some pub operators.

9.27 The restaurant sector has also experienced mixed fortunes during the economic downturn. Some of the key trends driving change in this sector include:

- An increase in promotions and discounts by the multiples to attract customers during off-peak periods (e.g. Pizza Express).

- More discerning customers who are basing their decisions to eat out on value for money, but not at the expense of quality in terms of service, food and the overall experience. Two recent successes are Jamie's Italian and Cote. There has also been a growth in '*all-you-can-eat*' style restaurants which are aimed at offering value for money (examples include the Taybarns brand owned by Whitbread).

- For families in particular, going out for a meal has become too expensive, and many have switched to staying at home with a takeaway which has increased sales for businesses such as Domino's Pizza.

[28] Source: Article published by CAMRA on 20th March 2013, www.camra.org.uk

9.28 The café sector has also experienced strong growth over the last five years, despite the impact of the economic downturn. The branded coffee chains dominate the market with some 5,222 outlets in 2012 equating to a market share of 54%. Of these, the three leading multiple chains are Costa Coffee (1,552 outlets), Starbucks Coffee Company (757) and Caffè Nero (530), with a combined turnover of £2.3 billion. Notwithstanding the rise of the multiples, there has also been growth in independent and specialist cafés and coffee houses, particularly those serving a more luxury or specialist offer (e.g. organic and Fairtrade).

9.29 The strong independent coffee sector has fuelled many new start-up businesses in local centres. While many forecasters considered the café market to be saturated a few years ago, a recent study by management consultancy Allegra Strategies predicts that the total UK coffee shop market still has potential for strong growth, and there is forecast to be over 20,000 outlets by 2017, with a total turnover of £8 billion. There would therefore appear to be potential for further growth in the café market, driven mainly by branded coffee chain expansion and non-specialist operator growth.

Existing Provision

9.30 Based on the most recent audit the District's three main centres (see Sections 5 to 7), the current provision of Class A3-A5 uses is as follows:

Table 9.5 **Current Provision of Class A3-A5 Uses**

Location	Class A3		Class A4		Class A5	
	No. of Units	% of Total	No. of Units	% of Total	No. of Units	% of Total
Royal Leamington Spa TC	67	9.88	30	4.42	28	4.13
Warwick TC	35	13.17	14	4.98	11	3.91
Kenilworth TC	18	10.77	5	3.00	4	2.40
UK Average	**-**	**8.48**	**-**	**4.27**	**-**	**5.47**

Source: Experian Centre Category Reports for Royal Leamington Spa (December 2012), Warwick (February 2013), and Kenilworth (January 2012).

9.31 The table above shows that the main provision of Class A3-A5 uses are concentrated in Royal Leamington Spa. The town centre benefits from a strong provision of key restaurant chains, including Pizza Express, Wagamama, Strada, Prezzo, Café Rouge, and more recently, Carluccios, Nandos and Bills. These brands act as important commercial leisure anchors in themselves by supporting the centre's day to evening time trade; particularly at weekends. This is particularly important for Royal Leamington Spa as one of the region's key tourist and shopping destinations.

9.32 The Class A3 offer in Kenilworth and Warwick Town Centres is also above the national average. While provision largely comprises independent businesses, both centres do have a number of branded restaurants. For example, both Pizza Express and Ask are in Warwick town centre, while Zizzi and Loch Fyne have outlets in Kenilworth.

However, the table does highlight an under-provision of Class A4/A5 uses in Kenilworth.

9.33 It is noted that Royal Leamington Spa centre has a limited number drinking establishments such as bars/wine bars and public houses with provision below the average for town centres. These facilities are important in sustaining evening and night-time economies and supporting other leisure sectors. It should be noted that the Council's License Authority operate a special policy regarding the cumulative impact of alcohol licences within the town centre. This is to prevent the proliferation of drinking venues and off licences, which can lead to public nuisance anti-social behaviour. The policy applies to all license applications within a defined 'cumulative impact zone' which includes key shopping areas in the New Town and Old Town.

9.34 It is important that Royal Leamington Spa retains and enhances food and drink offer as it not only supports the daytime economy, but is the main driver of the centre's evening economy. While its restaurant offer is generally good, opportunities to attract new restaurant brands should be promoted where possible. This in turn will help draw more people to the town centre and encourage them to stay longer.

9.35 In terms of late night entertainment, the Experian Goad survey identified one major night club or dance venue ('Sui Generis' Use Class) in the District, which is located in Royal Leamington Spa. However, there are a number of night clubs that are not recorded by Experian Goad including Smack (Tavistock Street), Rios (Bedford Street) and Neon (Spencer Street). The Assembly on Spencer Street also serves a live music venue. Notwithstanding this there are no nightclub or dance venues in Kenilworth or Warwick town centres.

9.36 The results of the household survey helped to identify where people living in the study area currently prefer to eat and drink. The key results for the Study Area are as follows:

- Almost three quarters of respondents (74%) in the Study Area eat out at restaurants. A similar result was identified for the respondents in the Core Zones (75%). Respondents from the Kenilworth area (Zone 7) are more likely to eat out compared to other.
- The survey results show that 32% eat out at least once a month (e.g. once a week to once a month) with 31% eating out every two months, 20% every six months and 18% once a year or more. Similar results were identified for respondents living within the Core Zones.
- The survey findings show that one-quarter of respondents in the Study Area eat out in Royal Leamington Spa, increasing to 44% for respondents from the Core Zones. Warwick and Kenilworth attract a similar proportion of respondents at 11% and 12% respectively, increasing to 18% (for both centres) based on respondents from the Core Zones.

- Looking more closely at eating out habits within the Core Zones, the survey shows that the majority (70%) of respondents from the Core East Zone (Leamington) eat out in restaurants in Royal Leamington Spa. Similarly, 73% of respondents in Kenilworth choose restaurants in Kenilworth. In contrast, less than half (48%) of respondents in Warwick eat out in restaurants in Warwick, with 20% choosing restaurants in Royal Leamington Spa and over a quarter (26%) eating out at restaurants outside the District (e.g. Coventry and Stratford-upon-Avon).
- The majority (54%) of respondents in the Study Area visit pubs, bars, nightclubs and/or music venues with a similar majority (52%) based on respondents from the Core Zones. The survey results show that respondents from the Study Area are more likely to visit drinking venues in Royal Leamington Spa (19%) increasing to 41% for respondents in the Core Zones. Warwick and Kenilworth attract a similar proportion of respondents based on the Study Area (11%) and Core Zones (20%).
- In terms of frequency, 35% drink out at least once a week, 15% once every two weeks, and 24% go once a month and the remainder between once every two months and once a year. Similar results were identified for respondents living in the Core Zones albeit with a higher proportion visiting pubs at least weekly (40%).

Forecast Demand for Eating and Drinking

9.37 According to the latest Experian data, average annual spend in the Study Area on 'cafes, restaurants, etc.' was estimated to be £1,166 per person in 2013, which equates to approximately 62% of total commercial leisure expenditure.

9.38 Based on Experian's forecasts of annual growth in leisure spend, we estimate that average expenditure in this specific leisure sector will increase to £1,227 per capita by 2031. Applying this to population over the forecast period, this equates to £495m of available expenditure in the Study Area by 2029, increasing to £515m by 2031 (as shown in Table 6, Appendix 9).

9.39 In order to assess the potential capacity for new eating and drinking establishments we have assumed that between 15%-30% of the forecast capacity for new comparison goods floorspace (as identified in **Section 8**) could support a mix of new cafés, restaurants, pubs and wine bars. This floorspace estimate for A3 to A5 floorspace would be over and above the comparison floorspace capacity identified in Section 8. This method of quantifying potential new A3 to A5 floorspace is supported by research that specifically identified that the hospitality industry, in its widest sense, "…*forms an important and sizeable proportion of premises averaging 24% of ground floor stock*"[29]. Furthermore Experian GOAD's centre reports show that on average cafe's, restaurants,

29 The Streetscape of major UK cities', Savills (Winter 2004, pg.3).

bars, pubs and takeaways account for up to 15% of floorspace and 18% of outlets in the 2,500 shopping areas that they cover.

9.40 Based on the baseline comparison goods capacity forecasts set out in **Section 8** we estimate that there is a potential quantitative need for between 3,473m^2 and 6,946m^2 of Class A3-A5 floorspace in the District by 2029. The majority of this new Class A3-A5 floorspace would be directed to Royal Leamington Spa.

Table 9.6 **Eating & Drinking Out - Projected Floorspace (m2) for District**

Year:	Projected Comparison Floorspace (m^2 gross)	15% - 30% of Comparison Floorspace to A3/A4/A5 Uses (m^2 gross)
	Baseline Forecast	Baseline Forecast
2018	3,991	599 – 1,198
2023	11,960	1,794 – 3,588
2029	23,151	3,473 – 6,946
2031	25,634	3,845 – 7,690

Source: Comparison floorspace (gross) identified in Table 14 (Appendix 8).

9.41 However, it should be highlighted that the floorspace projections set out in Table 9.6 should be treated as indicative rather than a target level of floorspace that needs to be achieved. The food and drink market has grown significantly in recent years and is reflected by the growth of leading restaurant, coffee and bar brands in town centres. This is evident in Royal Leamington Spa where a number of major restaurant chains have opened in the town centre over recent years, including Bills, Wagamama, Nandos and Carluccio's. These uses now play an increasing role in supporting town centre daytime and evening economies, particularly where retail is no longer the primary function.

9.42 Improvements to the quality of the food and drink offer should be actively supported in the District's town centres. Forecast need should be directed to Royal Leamington Spa as a priority to help increase competition and choice and stimulate the centre's daytime/evening economies, in accordance with national and local policies. However meeting any forecast need for new cafés, restaurants and bars is highly dependent on the level of market demand and confidence in the centres as trading locations. In simple terms the more successful, vital and viable a centre is, the more likely it will be that café and restaurant operators will want to locate there. With regard to new A4 and other licensed uses in Royal Leamington Spa, an increase in provision must comply with the Council's special policy on new alcohol licenses in the 'Cumulative Impact Zone'.

9.43 While new investment in Royal Leamington Spa should be a priority, new eating and drinking uses should also be provided in Warwick and Kenilworth at an appropriate scale to meet local demand. At the same time, new food and drink floorspace should not compromise retail floorspace supply across the town centres' primary shopping locations, in order to ensure that a sustainable and viable mix of town centre uses is maintained.

HEALTH & FITNESS NEED

Market Overview

9.44 The health and fitness market has generally performed well during the economic downturn. Since 2009, the industry has grown its total market value to £3.86 billion, its member base by 3.6% and the total number of facilities by 1.7%. According to data from the Leisure Database Company (LDC), there were an estimated 5,900 private health clubs and public fitness centres facilities in the UK in 2012, which represented a small net decrease from the 5,852 facilities the previous year[30]. Of these some 3,176 were private clubs and 2,724 were public facilities. The main operators in the market currently include:

- Esporta, Greens & David Lloyd Leisure – at the premium end of the market focus on health, racquet and tennis clubs;
- Virgin Active & Nuffield Health (previously Cannons) – dominate the mid-range family-oriented health and fitness market; and
- LA Fitness, Fitness First and Bannatyne's Health Clubs – operate smaller in-town clubs at the more value end of the market.

9.45 However, the most significant growth in the sector in recent years has been fuelled by value and budget operators. The new wave of ("*no frills*") fitness clubs includes EasyGym, Pure Gym, Fitness 4 Less, Fitspace, TruGym and SimplyGym. Their business models are based on significantly discounted monthly subscriptions (of between £10 and £20 on average) and 24-hour opening. Although these clubs provide a basic offer (for example, they do not generally include fitness classes, personal trainers, swimming pools, saunas or steam rooms) they appear well suited to the current economic climate and are proving popular. A good example is PureGym which opened its first gym in Leeds in 2009 and now currently has over 60 gyms, with a further circa 35 in the pipeline.

9.46 Overall, the proportion of the population in 2012 with a gym membership was estimated at 12% (of which 7.2% were members of private clubs and 5% were members of public facilities). According to the LDC, the average number of members per club in the UK is estimated to be 1,426, which takes into account the average for independent venues (726 per club) and leisure chains (2,198 per club). For the larger fitness chains (e.g. David Lloyds, Virgin, LA Fitness, etc.) the average club

30 The Leisure Database Company – 2012 FIA State of the UK Fitness Industry Report

membership increases to 2,897, while budget chains are even higher at 3,452 members[31].

9.47 The rapid growth of this sector has also been characterised by a marked shift in the location of clubs from out-of-centre locations to town centres, often as part of wider mixed use developments. This is helping to create a wider range of attractions and activity in town centres, particularly in the evenings and at weekends. More flexible planning policies will therefore need to be introduced which help to encourage an element of such uses within existing buildings or as part of mixed use schemes.

Existing Provision

9.48 The table below summarises the current representation of national, regional and independent privately-owned health and fitness operators in the District, as well as the Council-owned leisure centre. The geographic locations of all health and fitness facilities in Table 9.10 are identified in **Appendix 9**.

9.49 The table shows that despite a strong population, there is a notable gap in the provision of branded health and fitness clubs. The only representation is the LA Fitness and Living Well (Hilton Warwick) in Warwick. There is no key operator in Royal Leamington Spa whereas for many sub-regional centres in the UK there are multiple operators. For example, Fitness First, Virgin Active Bannatyne Health and Fitness and Pure Gym are notably absent.

Table 9.7 **Leisure Centres, Fitness Clubs & Gyms in the District**

Facility	Address	Private Sector	Public Sector
ROYAL LEAMINGTON SPA:			
Bizz Fitness	Spencer Street, Royal Leamington Spa	✓	
Leamington Spa Rugby/Football Club	Kenilworth Road, Royal Leamington Spa	✓	
Newbold Comyn Leisure Centre	Newbold Terrace, Royal Leamington Spa		✓
Pinx Fitness	Radford Street, Royal Leamington Spa	✓	
Pure Health Club	Bedford Street, Royal Leamington Spa	✓	
The Workout Mill	Regent Place, Royal Leamington Spa	✓	
Urban Sports & Fitness	Collins Road, Royal Leamington Spa	✓	
WARWICK:			
LA Fitness	Weldon Road, Warwick	✓	
Living Well Health Club	Hilton National, Warwick	✓	
Nuffield Health & Fitness	Gallagher Business Park, Warwick	✓	
St Nicholas Park Leisure Centre	Banbury Road		✓
Studio Warwick	Old Square, Warwick	✓	
Warwick Sports Club	Hampton Road, Warwick	✓	

31 Leisure Database Company

Facility	Address	Private Sector	Public Sector
KENILWORTH:			
Abbey Fields Swimming Pool	Bridge Street, Kenilworth		✓
Castle Farm Recreation Centre	Fishponds Road, Kenilworth		✓
Curves Women's' Gym	Talisman Square, Kenilworth	✓	
Kenilworth Golf Club	Crewe Lane, Kenilworth	✓	
Meadows Community Sports Centre	School Leyes Lane, Kenilworth		✓
OTHER IN DISTRICT:			
Ardencote Manor Leisure Club	Lye Green Road, Warwick	✓	
Warwickshire Health & Country Club	Leek Wootton, Warwick	✓	

Source: Various

9.50 The household survey results show that almost three quarters (74%) of respondents within the Study Area do not go to a gym or healthclub and/or go swimming. Of the 26% that do go to the gym, 42.4% visit facilities in the District with the most frequented facilities located in:

- Royal Leamington Spa (14% of respondents) - including Pure Gym (independent operator), Pinx Fitness and Bizz Fitness;
- Warwick (22%) - including Nuffield Health & Fitness and LA Fitness;
- Kenilworth (6%) – including Curves Women's Gym.

9.51 The household survey results also indicate a relatively high level of 'leakage' to facilities outside the District based on respondents within the Study Area. Of the total number of respondents who visit a gym or healthclub and/or go swimming, 57% visit facilities outside the District. However, based on respondents living in the Core Zones only, leakage is considerably lower with only 14% of respondents visiting venues outside the District. This suggests that those living in close proximity to the District's three main centres are more likely to use local facilities, while those in more peripheral areas are more likely to choose venues outside the District.

Forecast Demand for Health and Fitness

9.52 The need for health and fitness clubs can be linked to the potential demand arising from population growth at the local level. In this case the Study Area's population is estimated to increase by 49,437 by 2031 (Tables 1, **Appendix 9**). Based on the Study Area's average participation rate of 25.7%[32] identified by the household survey, this would potentially result in an additional 12,682 new gym and health and fitness members over the forecast period. Assuming the District's maintains a similar market

[32] Participation rate identified from the household survey.

share for its existing venues as identified in the HTIS (42.4%) this would result in 5,379 new members.

9.53 It is likely that existing facilities in the District and competing locations (e.g. Coventry) will absorb some of this demand, and average membership levels will change over time in line with the constant changes in fitness facility formats. Notwithstanding this, there would appear to be capacity to support an increase in leisure provision in the District over the medium to long-term. Based on average membership rates for private fitness clubs identified earlier in this section, this could support two new major operators. Given the profile of existing provision in Royal Leamington Spa, there is potential to attract a second major operator such as Virgin Active or Fitness First. There is also potential to attract a budget or value operator, as this type of facility would appeal to a wider customer base.

9.54 As for the other leisure sectors, addressing this forecast capacity will be dependent on the level of market interest and demand. However, given that there is only one major branded health and fitness operator serving the District, there does appear to be significant potential for growth at the local level. In turn this could help to increase participation and/or capture some of the 'leaked' trips to health and fitness facilities outside the District.

BINGO AND GAMBLING

9.55 Gambling represents a significant and growing element of the leisure industry. The main sectors of the gambling industry comprise 'games of chance' (i.e. bingo clubs, casinos, betting shops, amusement arcades, etc.). We briefly describe the key trends in this sector and the forecast need/demand for new facilities in the District, if any, based on the available evidence.

Market Overview and Current Provision

9.56 The latest research by *The Gambling Commission* (*Annual Review 2012/13*) indicates that there are over 226 licensed bingo clubs in operation in the UK and six new operators were awarded licences for new venues within the last 12-18 months. In the 12 months up to June 2011 some 3.4% of UK adults visited bingo venues, but research by *Mintel* indicates that the industry has experienced a fall in revenues and admissions over recent years as a result of legislative changes (such as the ban on smoking in public places), the impact of the economic downturn and the growth of online gaming.

9.57 In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smartphone technology through new 'app' development. This forms part of a wider trend and growth in *'remote/online'* gambling, which including gambling activities through the internet, telephone, radio, etc. Bingo operators are also increasingly looking to diversity their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes.

9.58 In terms of Casinos, research shows that there were some 79 licenced casinos in the UK in March 2013 of which 25 represent remote/online licences[33]. This sector is dominated by three companies - the Gala Group, Grosvenor Casinos and Stanley Casinos/Stanley Leisure/Genting International. The number of admissions to casinos increased substantially by 25% over the five year period up to 2010/11. This growth is largely explained by larger new casino venues granted licences under the 2005 Gambling Act.

9.59 Based on the available evidence, there are no bingo halls or casinos in the District. The nearest bingo hall is located in Coventry (Gala Bingo) which also provides the nearest casino provision (G Casino at Ricoh Arena). The household survey results indicate that bingo and casino gambling is not a major leisure activity for the majority of respondents living in the District, with only 4.2% indicating that they frequent bingo clubs or casinos. Gala Bingo in Coventry is the most popular location with 35.3% of respondents in the District normally choosing this facility. The survey identifies a market share for bingo activity in Royal Leamington Spa and Warwick, however, this is likely to include bingo played at amusement arcades and social clubs. Given the low participation levels associated with bingo and the location of an existing facility in Coventry, there is unlikely to a sufficient critical mass to support the introduction of a bingo hall.

9.60 With regard to casino provision, there is unlikely to be sufficient demand to accommodate the introduction of a new venue. Furthermore, there is unlikely to be demand from casino operators who typically focus new outlets in major leisure destinations.

9.61 In summary, there is no demonstrable need to introduce a bingo or casino facility within the District to improve choice at the local level, although this will be subject to market interest and demand from other bingo and casino operators. If demand arises in the future, this should be directed to the District's main centres first in accordance with national and local plan policy. Royal Leamington Spa would be the preferred location for any new facility given there is already an established evening time economy to support a new bingo or casino facility.

9.62 In planning for new 'games of chance' consideration will also need to be given to the potential conflict of gambling uses with other wider town centre uses. This is particularly relevant to betting offices with many planning authorities seeking to limit their over-representation in town centres. The latest Experian Goad Category Report

[33] Source: Gambling Commission Annual Review 2012/2013.

identifies 5 betting offices in Leamington, which equates to insert 0.74% of total town centre uses and is below above the average for centres in the UK (1.4%). Warwick has 3 betting offices and Kenilworth has 1; equating to 1.07% and 0.6%, respectively, of total centre units.

Forecast Demand for Bingo and Casinos

9.63 According to the latest Experian data, average annual spend in the Study Area on '*games of chance*' was estimated to be £181 per person in 2013, which equates to approximately 8.5% of total commercial leisure expenditure.

9.64 Based on Experian's forecasts of annual growth in leisure spend, we estimate that average expenditure in this specific leisure sector will increase to £229 per capita by 2031.

9.65 Applying this to population over the forecast period, the tables below shows that there will be £76.8m of available expenditure in the Study Area by 2029, increasing to £79.9m by 2031.

Table 9.8 **'Games of Chance' - Total Forecast Available Expenditure (£m) – Study Area**

	2013	2018	2023	2029	2031
Zone 1	£5.8	£6.5	£7.2	£8.2	£8.5
Zone 2	£5.8	£6.5	£7.3	£8.3	£8.6
Zone 3	£5.2	£6.0	£6.9	£8.0	£8.4
Zone 4	£5.0	£5.6	£6.3	£7.2	£7.5
Zone 5	£4.9	£5.6	£6.3	£7.2	£7.5
Zone 6	£6.6	£7.3	£8.2	£9.3	£9.6
Zone 7	£4.6	£5.0	£5.5	£6.1	£6.3
Zone 8	£5.2	£5.7	£6.2	£6.8	£7.1
Zone 9	£6.8	£7.7	£8.6	£9.7	£10.1
Zone 10	£4.3	£4.8	£5.4	£6.1	£6.4
TOTAL STUDY AREA	**£54.3**	**£60.7**	**£67.9**	**£76.8**	**£79.9**
CORE ZONES : 1-3, 7	**£21.4**	**£24.0**	**£26.9**	**£30.5**	**£31.8**

Source: Table 10 (Appendix 9).

9.66 The latest Experian Report indicates that gambling uses currently account for some 1,468m^2 (gross) of floorspace in the District. Three quarters of this floorspace is located in Leamington Spa Town Centre, which equates to approximately 1% of total town centre floorspace. This is below the UK average identified by Experian Goad (2%). Floorspace provision for gambling uses is below the UK average for Warwick and Kenilworth. Based on projected expenditure and current provision, there is likely to be increased demand for this form of activity. Unlike with retail and leisure, projecting future need for 'games of chance' provision is more complex. It is a niche market that responds directly to market demand and changing formats; in particular online activity. In reality, we consider that the popularity of online gambling is likely to absorb the majority of the forecast growth in expenditure on 'games of chance' over the long term.

TEN-PIN BOWLING

9.67 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years and remains a strong family and group activity. Research shows that there are currently over 321 bowling centres in the UK[34].

9.68 This sector benefitted from a period of growth from the mid-1990s onwards, fuelled by the development of large entertainment 'boxes' and leisure parks at one end of the spectrum, and smaller independent specialist bowling facilities at the other end. A number of the successful bowling facilities opened over the last 15-20 years tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. It is the critical mass of leisure uses under one roof or as part of leisure parks that helps to underpin the viability of ten-pin bowling centres, which can struggle as standalone attractions. Examples of the smaller specialist operators include *All Star Lanes* which operates five bowling venues in the UK (four in London and one in Manchester) and largely targets the corporate/private hire market. *Bloomsbury Bowl Lanes* also operates from smaller venues with sites in Bloomsbury (8 lanes) and Bristol (5 lanes). The company offers a 1950's American-themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.

9.69 The District has one 26-lane ten-pin bowling venue close to Leamington Retail Park which is operated by Tenpin. The facility includes a licensed bar, café, and other leisure activities (such as pool tables and an amusement arcade). The nearest competing venues are located in Rugby (Rugby Super Bowl at Junction One Retail Park) and Coventry (Tenpin at Crosspoint Business Park), with additional facilities located in Banbury and Birmingham.

9.70 The household survey indicates that tenpin bowling is not as popular a leisure activity, with only 42,493 (14%) of respondents living in the Study Area indicating that they partake in this activity. The existing tenpin bowling venue at Leamington Retail Park captures the majority of all trips (71%) increasing to 98% based on respondents living in the Core Zones. The next popular tenpin bowling facility is Tenpin in Coventry, which accounts for approximately a fifth of trips in the Study Area. Of those that do visit tenpin bowling facilities, they go relatively infrequently with 30% partaking in

[34] Tenpin Bowling Market UK, Mintel (November 2012)

tenpin bowling once a year, 31% once every six months and 24% once every two months. Only 7% visit bowling facilities once a month or more.

9.71 In terms of future needs, we consider provision in the District is adequately served by the existing Tenpin outlet at Leamington Retail Park. This is based on the relatively low participation levels within the Study Area and the limited forecast growth in this sector over the short to medium term. However, as the economy strengthens and as the population increases there may be a need for an additional facility over the long term. If this is the case and market demand exists, then a new facility should be directed to the District's town centres first to help maintain and strengthen their diversity of offer and evening economies.

CULTURAL ACTIVITIES

9.72 The results of the 2013 HTIS show that over 167,542 (55%) of respondents in the Study Area engage in cultural activities including visiting the theatre, museums or places of historical interest. Of those that undertake this activity, 29% of respondents visit cultural or historical venues in the District. Of this total, respondents are more likely to visit attractions in Royal Leamington Spa (15%) or Warwick (12%). In terms of competing locations for cultural activities, Coventry remains the most popular attracting 19% of respondents in the Study Area.

9.73 Based on responses from the Core Zones, the District's market share for expenditure in cultural activities increases to 48% with Royal Leamington Spa being the most popular location (28%).

9.74 Both Royal Leamington Spa and Warwick benefit from a good mix of cultural and historical attractions. Leamington provides a good range and choice of cultural and heritage attractions. As well as the town's architectural heritage, there are many cultural activities. The Royal Spa Centre, a Council managed multi-arts facility, accommodates a theatre and cinema auditorium and also serves a music and exhibition venue. In addition, Warwick benefits from a strong leisure and tourist economy associated with the castle.

9.75 Generally, the District has noticeably high number of theatres with 6 in total including two theatres in Royal Leamington Spa (the Royal Spa and The Loft Theatre), Warwick (Bridgehouse Theatre and Playbox Theatre) and Kenilworth (Priory Theatre and Talisman Theatre).

9.76 Demand for new cultural facilities (such as theatres and music venues) is likely to be muted given that the District is already well served by existing venues. Instead, there is potential to promote existing facilities, through physical improvements or marketing. This could assist in enhancing District's profile for cultural entertainment and its competitive position against competing facilities in Coventry.

SUMMARY

9.77 As for retailing, the commercial leisure industry faces considerable challenges and pressures in the current economic climate. It is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure spending. There will also be a continued increase in at-home activities due to the advances in computers, tablets, television and audio technology. The challenge for town centres and leisure operators in the future will therefore be to attract customers away from their homes.

9.78 The table below shows the percentage of the Study Area's respondents to the household survey who indicated that they do not participate in the various leisure activities identified.

Table 9.9 **Respondents in Study Area who do not participate in leisure activities**

Leisure Activity	Respondents who do not participate in leisure activities (%)
Bingo/ Casino	96%
Cinema	52%
Cultural/historical interest	45%
Eating out in restaurant and/or café	26%
Drinking out in a pub/bar/music venue	45%
Gym/ Healthclub/ Sports facility	74%
Ten pin bowling	86%

Source: 2013 HTIS.

9.79 The table shows variation in the popularity of particular commercial leisure activities with eating and drinking out and cultural/historical interest activities the most popular. It also shows that the majority of the Study Area's residents do not normally participate in other commercial leisure activities including going to the cinema, gym/healthclub and tenpin bowling.

9.80 Our review of the District's commercial leisure sector and offer, and the results of the household survey, indicate that there is a relative good choice of leisure uses. The participation rate for certain leisure activities is particularly high (e.g. restaurants, pubs/clubs/music venues and cultural activities) and this offers the potential to enhance the overall offer, subject to market demand. There is clearly potential to improve and strengthen the leisure offer in the District's main centres to help stimulate their evening economies and increase "*dwell times*" during the day to the benefit of other shops, businesses and facilities.

9.81 The assessment indicates that there is potential to support at least two new branded health and fitness leisure operators based on projected population growth. The District only has one major health and fitness operator located in Warwick (LA Fitness). A competing operator could assist in improving the District's market share of gym/health fitness memberships and increasing participation rates in this particular leisure activity.

9.82 In terms of cinema provision, while there is limited quantitative capacity for new screen provision based on average screen density assumptions for core zones, there is greater screen potential when taking account of the population in other zones. There is also an obvious qualitative deficiency in cinema provision; particularly compared to facilities in competing centres. Royal Leamington Spa lacks a modern multiplex cinema venue, which impedes its competitive advantage against other nearby centres, notably Coventry. A new facility in the town centre has the potential to strengthen footfall in the centre and support complementary services (e.g. eating and drinking venues and retail).

9.83 Similarly, opportunities to promote other cultural activities should be explored; particularly given the District's wealth of historical and cultural assets. The District has a relatively high number of theatres and there may be potential to further enhance and market these venues collectively (e.g. arts/theatre festival).

10.0 CONCLUSIONS & RECOMMENDATIONS

10.1 This study provides an update of the high level strategic assessment of the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace and commercial leisure uses in the District and its three main centres. It provides a sound basis, drawing on robust research and recent survey evidence, to help inform and guide the District's shopping and leisure needs up to 2029. The overriding objective is to help the local planning authority promote competitive town centre environments in accordance with the NPPF and other material considerations.

DISTRICT-WIDE RETAIL CAPACITY ASSESSMENT

10.2 **Section 8** assessed the District-wide capacity for new (convenience and comparison goods) retail floorspace over the forecast period, as well as the capacity for the District's three main centres.

10.3 For convenience goods the 'baseline' forecasts identified no capacity for new retail floorspace in the District over the short to medium term, with a limited forecast capacity by 2029. By way of reference, the *2013 Retail Capacity Refresh* also identified no capacity over the entire study period. It is apparent from the quantitative analysis that new foodstore commitments that have recently opened in the District or are scheduled to open within the next five years, will account for the majority of forecast residual expenditure capacity growth up to 2029.

10.4 Notwithstanding this, the healthcheck and survey evidence does point to a qualitative 'gap' in the foodstore offer of both Royal Leamington Spa and Warwick Town Centres. New foodstore anchors in these centres would help to strengthen their overall vitality and viability through the claw back of shoppers and expenditure from competing out-of-centre locations, as well as through the generation of linked trips and increased footfall to the benefit of other shops, businesses and facilities. However this will depend on the identification and availability of suitable and viable sites in these centres to accommodate appropriately sized stores, and the market appetite from major foodstore operators to take space either in these centres or on edge of centre sites that are well connected to the primary shopping areas.

10.5 For comparison goods, there is a District-wide 'baseline' capacity for 16,180m^2 net of new retail floorspace by 2029. By way of reference the *2013 Retail Capacity Refresh* identified a higher 'baseline' capacity of 25,588m^2 in 2029. This difference in the capacity forecasts is explained by a range of factors including the more subdued forecast growth in comparison goods expenditure, the higher growth in the market share of online shopping and the fact that the updated survey evidence shows that all the District's main centres have experienced a decline in their market shares since the last household survey was conducted.

10.6 We advise that this floorspace capacity should be directed to Royal Leamington Spa Town Centre as a priority to help strengthen its important strategic role as the District main shopping centre. This is in compliance with local and national policy, and is in response to the increasing competition from other major shopping and leisure destinations both within and outside the District, as well as the forecast growth in online shopping.

10.7 Although no capacity has been identified for new retail floorspace in Warwick or Kenilworth Town Centres over the development plan period, we nevertheless advise that the local planning authority should explore and identify opportunities to improve the scale and quality of the retail offer in these important town centres. This will help to maintain and enhance their overall vitality and viability in the future, particularly as they have both experienced a decline in their market shares and competitive positions over recent years.

10.8 Finally, it is important to restate that capacity forecasts beyond 5 years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending levels, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current Experian forecasts suggest, then this could reduce the future demand and capacity for new 'physical' space over the long term.

COMMERCIAL LEISURE PROVISION & NEED

10.9 The findings of the leisure assessment in **Section 9** confirmed that the District has a relatively good level of commercial leisure provision.

10.10 Eating and drinking out of home accounts for the greatest proportion of leisure expenditure in the District. Overall the three centres have a good provision of food and drink uses which are important in supporting the District's daytime, evening and visitor/tourist economies. In particular, Royal Leamington Spa has benefited from a number of key restaurant brands opening in the town centre over recent years. We consider that there is significant potential to increase the quality of the Class A3-A4 offer in the District's main centres, particularly outside the primary shopping areas in more secondary shopping streets where the demand for Class A1 uses is more limited.

10.11 With regards to the need for other commercial leisure uses in the District, we have identified the potential for a modern new cinema in Royal Leamington Spa to help strengthen its daytime and evening economy. This would need to be in a more prominent location than the existing cinema in the town. However, this will clearly be subject to market demand from cinema operators for representation in the town centre and the identification of a suitable and viable site preferably in or close to the primary shopping area to help maximise the potential for linked trips to other shops, businesses and facilities as part of the overall 'cinema trip'.

10.12 The leisure assessment has also highlighted the potential to accommodate more private gym/health club facilities in the District, with particular focus on attracting a key leisure brand. This need will increase over time if membership rates increase. We advise that new facilities should be provided in the District's town centres first in accordance with national and local plan policy objectives, possibly as part of new mixed use redevelopment opportunities.

10.13 Other commercial uses including tenpin bowling, bingo and casino provision are largely met by existing provision and the growth of online facilities. In any case, market demand for these uses is low, as reflected by the participation rates identified in the household survey. As a result we do not consider that there is a need to promote new provision in tenpin bowling and gambling facilities in the District at this point in time. However, if market demand does arise over the development plan period then new provision should be directed to the District's main centres first in compliance with policy.

IMPACT ASSESSMENT - FLOORSPSPACE THRESHOLD

10.14 Finally, we have reviewed whether there is a requirement for the local planning authority to set a "*proportionate, locally set floorspace threshold*", rather than use the default threshold of 2,500m^2 gross identified by the NPPF (paragraph 26). By way of clarification this is the floorspace threshold above which applicants will be required to carry out an impact assessment for new retail, leisure and office development outside of town centres that are not in accordance with an up-to-date Local Plan.

10.15 The *National Planning Practice Guidance* (NPPG) published in March 2014 provides helpful advice in setting a locally appropriate threshold and states that it will be important to consider the:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

10.16 In the case of Warwick District, the evidence shows there is significant and growing pressure on the role, function, vitality and viability of the District's main centres from out-of-centre foodstores, retail warehouses and leisure facilities. This is illustrated by the recent opening of Morrisons, Aldi and Lidl in out-of-centre locations, and the attraction of Leamington Shopping Park to national retailers more usually associated with the high street (including, for example, Debenhams, Next, Argos and New Look).

The surveys and health check evidence show that the District's town centres are losing market share and customers to out-of-centre destinations, which also have a competitive advantage in terms of free parking and lower rents. Looking ahead over the development plan period the take-up and growth of online shopping represents a further threat to the market shares of the District's main centres. Furthermore, the growth of online shopping will also potentially reduce retailers' requirements for new floorspace, and could result in some operators withdrawing from under-performing centres.

10.17 Leamington Spa, Warwick and Kenilworth town centres are all therefore competing for new investment and business with out-of-centre locations. They are all, to varying degrees, vulnerable to the impact of new out-of-centre retail and leisure floorspace.

10.18 It is against this background that the local planning authority is seeking to retain and attract new investment to its town centres to help maintain and enhance their vitality and viability, and meet the identified need for new retail floorspace and leisure uses over the development plan period.

10.19 One of the priorities for the Council is to deliver a new retail and leisure development in Leamington Spa on the Chandos Street car park site, in partnership with Wilson Bowden Developments Limited. However the viability of this scheme will depend on it providing appropriately sized units designed to attract a mix of national retail and leisure operators. Based on shopping centres opened in town centres over the last decade it is likely that a significant proportion of the units in the scheme will be below the 'default threshold' of 2,500m^2 gross (26,910 sq ft). Together these units will accommodate the needs of major operators who will provide the necessary critical mass to help anchor the scheme and underpin its overall viability. However, if similar-sized units were allowed out-of-centre without the requirement for a comprehensive retail impact assessment, then it would inevitably result in retailers and leisure operators choosing to locate and operate outside of the town centre. In the current market it is also clear that there is only a finite demand from retailers seeking space in shopping locations. It therefore follows that those retailers and leisure operators taking space in out-of-centre locations would be 'lost' from the town centre for good.

10.20 For these reasons we conclude that the 'default threshold' of 2,500m^2 gross could have a significant adverse impact on the local planning authority's strategy and plans to attract new investment and business to its main town centres (and specifically the Chandos Street car park development opportunity). As a result we recommend that a lower floorspace threshold is set for the District. This will enable the local planning authority to fully assess and determine the impact of new out-of-centre floorspace on the vitality and viability of its centres, including the impact on existing, committed and planned public and private investment in accordance with the NPPF (para 26).

10.21 In this case we consider that a local floorspace threshold of 500m^2 gross and above is reasonable, appropriate and proportionate to Warwick District and its main centres.

10.22 In general terms national retailers seeking space in town centre and out-of-centre locations usually have requirements for retail units of 500m^2 and above. Also stores with floorspace over 500m^2 gross are unlikely to be a purely local facility and will tend to draw trade from outside of their immediate local catchment[35]. As a result it is unlikely that standalone out-of-centre stores and shopping destinations (e.g. retail units in retail parks) will seek floorspace below this threshold; their 'business models' and competitive advantage over other stores and shopping locations is largely predicated upon trading from larger format retail units and drawing customers from wider catchment areas. We therefore conclude it is reasonable for applicants proposing developments of this size and above to demonstrate that they will not have a significant adverse impact on town centres either on their own or cumulatively with other commitments in the area.

10.23 Notwithstanding this, the Council will be aware that the average size of convenience stores operated by the major grocers (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.) and other operators (for example, Nisa and Spar) is generally below the 500m^2 gross threshold. Although we consider that setting a floorspace threshold below 500m^2 could potentially be too inflexible and restrictive, we nevertheless advise the Council to carefully monitor and assess the impacts of proposals for smaller convenience stores in the District on a case-by-case basis, specifically where these types of stores are proposed on the edge or outside of existing local centres that are highly dependent on convenience ('top-up') shopping for their overall vitality and viability, including footfall and linked trips.

10.24 Finally, it is important that the scope and detail of any Retail Impact Assessment (RIA) required in support of planning application is discussed and agreed between the applicants and the Council at an early stage in the pre-application process. The scope and level of detail included within a RIA should be proportionate with the scale of the proposal, and should be agreed with the Council on a case-by-case basis.

35 According to the Sunday Trading laws a 'large shop' is defined as being over 280m2 gross. This provides a broad indication at the national level as to what constitutes a 'large shop' capable of generating a reasonable amount of trade (and, therefore, the potential to result in an impact on shopping patterns).

11.0 GLOSSARY & ABBREVIATIONS

CITY CENTRES:	The highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with master plans or development briefs for particular sites.
TOWN CENTRES:	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.
TOWN CENTRE USES:	Main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
TOWN CENTRE BOUNDARY:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
PRIMARY & SECONDARY FRONTAGES	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses.
EDGE-OF-CENTRE	For retail purposes, a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. (For example, local topography will affect pedestrians' perceptions of easy walking distance from the centre).
OUT-OF-CENTRE	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
OUT-OF-TOWN	A location out of centre that is outside the existing urban area.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.

COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
REGIONAL & SUB-REGIONAL SHOPPING CENTRES	Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
FLOORSPACE 'PRODUCTIVITY' ('EFFICIENCY') GROWTH	The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period. The choice of the most appropriate level of growth will depend on individual circumstances, and in particular the capacity of existing floorspace to absorb increased sales. It is also important that selected rates of growth in productivity are compatible with assumptions about the growth in per capita expenditure.
QUANTITATIVE NEED	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
QUALITATIVE NEED	Includes more subjective measures such as, for example, consumer choice; the

	appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.
OVERTRADING	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
BENCHMARK TURNOVER	In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, the *Practice Guidance* advises that such turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.

– END –

CONTENTS

*Please note that the full survey results have been published in a separate volume and can be obtained directly from the local planning authority.

1

APPENDIX 1: PLANNING POLICY CONTEXT

1. Further to Section 2 of the main study, this appendix provides a more detailed overview of the national and local development plan planning policy context material to the consideration and assessment of town centres and retailing in the District and its main centres.

NATIONAL PLANNING POLICY FRAMEWORK (NPPF)

2. The NPPF was published in March 2012 and sets out the planning policies for England and how these are expected to be applied. It reinforces the importance of up-to-date plans and strengthens local decision making. The NPPF must therefore be taken into account in the preparation of Local Plans[*] and Neighbourhood Plans[†].

3. At the heart of the NPPF is a **presumption in favour of sustainable development**[‡], which is seen as *"a golden thread running through both plan-making and decision-taking"* (paragraph 14). The NPPF (paragraph 14) sets out the Government's view of what sustainable development means in practice for both plan-making and decision-taking at the local. For plan-making the Framework states that local planning authorities should positively seek opportunities to meet the development needs of their area. Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits; either when assessed against the policies in the NPPF taken as a whole, or where specific policies indicate development should be restricted. The Framework states that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that:

> *"…it is clear that development which is sustainable can be approved without delay. All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally" (paragraph 15).*

4. The NPPF (paragraph 17) also sets out 12 **core planning principles** that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should, *inter alia*, be genuinely plan-led; proactively drive and support sustainable economic development to deliver thriving local places; promote mixed use developments; focus significant development in locations which are or can be made

[*] Defined by NPPF (Annex 2) as the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current Core Strategies or other planning policies, which under the regulations would be considered to be development plan documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

[†] A plan prepared by a Parish Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

[‡] Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs.

sustainable; and deliver sufficient community and cultural facilities and services to meet local needs.

5. The Framework (paragraph 150) emphasises that **Local Plans** are *"…the key to delivering sustainable development that reflects the vision and aspirations of local communities"*. They should be *"aspirational but realistic"* and should set out the opportunities for development and clear policies on *"…what will or will not be permitted and where"* (paragraph 154). Only those policies that provide a clear indication of how a decision maker should react to a development proposal should be included in the plan. Any additional DPDs should only be used where clearly justified (paragraph 153).

6. The NPPF (paragraph 156) requires **strategic priorities** for the area covered by the Local Plan to deliver the homes and jobs needed in the area; the provision of retail, leisure and other commercial development; and the provision of health, security, community and cultural infrastructure and other local facilities; etc. Crucially the NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements:

   - plan positively for the development and infrastructure required in the area;
   - be drawn up over an appropriate time scale (preferably 15 years), take account of longer term requirements and be kept up to date;
   - indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;
   - allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate; and
   - identify land where development would be inappropriate, for instance because of its environmental or historic significance.

7. In terms of the **evidence-based approach to planning**, the Framework states LPAs should ensure that the Local Plan is based on *"…adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area"* (paragraph 158). Furthermore the assessment of, and strategies for housing, employment and other uses should be integrated, and take full account of relevant market and economic signals. LPAs should use this evidence base to assess the needs for land or floorspace for economic development, including for retail and leisure development; examine the role and function of town centres and the relationship between them; assess the capacity of existing centres to accommodate new town centre development; and identify locations of deprivation which may benefit from planned remedial action. The NPPF is clear that pursuing sustainable development requires *"…careful attention to viability and costs in plan-making and decision-taking"* (paragraph 173). Plans should be deliverable and, in this context, sites and the scale of development identified in the plan should *"…not be subject to such a scale of obligations and policy burdens that their ability to be delivered viably is threatened"* (paragraph 173).

8. The Framework (paragraphs 18-149) sets out 13 key 'principles' for **delivering sustainable development**, including building a strong, competitive economy; ensuring the vitality of town centres; promoting sustainable transport; delivering a wide choice of high quality homes; requiring good design; promoting healthy communities; protecting Green Belt land; and conserving and enhancing the natural and historic environment. In terms of **ensuring the vitality of town centres** the NPPF (paragraph 23) states that planning policies should be positive and promote competitive town centre[§] environments, as well as setting out policies for the management and growth of centres over the plan period. When drawing up Local Plans, LPAs should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas**, based on a clear definition of primary and secondary frontages†† in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres;
- ensure that the needs for retail, leisure, office and other main town centre uses are "met in full" and "not compromised by limited site availability". Assessments should therefore be undertaken of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;

[§] The NPPF (Annex 2) states that references to town centres or centres apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

[**] Primary shopping area is defined by the NPPF (Annex 2) as the defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

[††] The NPPF (Annex 2) states that 'primary frontages' are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. 'Secondary frontages' provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

9. When assessing and determining applications for main town centre uses[‡‡] that are not in an existing centre and not in accordance with an up-to-date Local Plan, the Framework requires that LPAs should:

- Apply a **sequential test**[§§], which requires applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only consider out-of-centre locations if suitable sequential sites are not available. When considering edge and out of centre proposals, "…preference should be given to accessible sites that are well connected to the town centre" (paragraph 24). Applicants and LPAs should demonstrate flexibility on issues such as format and scale.
- Require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500m^2). The NPPF (paragraph 26) states that this should *"include"* assessment of the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, *"…the impact should also be assessed up to ten years from the time the application is made"*.

10. The NPPF (paragraph 27) states that *"…where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused"*.

‡‡ NPPF (Annex 2) defines 'main town centre uses' as retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

§§ This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

DEVELOPMENT PLAN

11. The development plan for Warwick District Council comprises the adopted Local Plan (2007) (incorporating the adopted Proposals Map) and a raft of Supplementary Planning Documents. The Warwickshire Structure Plan (2001) has been entirely superseded by the Local Plan (2007).

Warwick District Local Plan

12. The Warwick District Local Plan and accompanying Proposals Maps were adopted in September 2007. Although a number of policies were "deleted" in September 2010, the vast majority of policies were "saved". The following sets out the "saved" policies relevant to retail, leisure and town centres.

13. Chapter 6 of the Local Plan sets out the Council's policies on development within defined Urban Areas. The following "saved" Policies UAP3, UAP4 and UAP5 are material to the assessment of new retail proposals and floorspace.

- **Policy UAP3** ('*Directing New Retail Development*') states that new retail development will be directed towards the District's three main Town Centres. Leamington Spa acts as a sub-regional shopping centre with a high-quality retail offer, whereas Warwick and Kenilworth provide more specialised retail functions. Outside defined Town Centres, proposals over 1,000 sqm gross floorspace will be required to justify how they comply with the provisions of Policy UAP3. This policy states that retail development will not be permitted unless the following criteria can be satisfied:
    - There is a proven retail need for the proposal[***];
    - There are no sequentially preferable sites;
    - It would reduce private travel;
    - The development will be well served by public transport; and
    - The proposal would not adversely impact upon Town or District Centres.
- **Policy UAP4** ('*Protecting Local Shopping Centres*') states that the change of use from retail units (Use Class A1) will not be permitted in local shopping centres unless the unit has been vacant for at least one year and evidence is provided to demonstrate active marketing; the proposed will significantly increase pedestrian footfall; and the change of use will maintain the predominance of A1 uses in the centre.
- **Policy UAP5** ('*Protecting Local Shops*') does not permit the change of use away from retail units (Use Class A1) under any circumstance outside defined Town Centres and local shopping centres,. This is to protect shops that serve the daily needs of local and isolated communities.

[***] It should be noted that although "need" is still material to plan-making and the allocation of sites, it cannot be used to justify for the refusal of retail, leisure and other town centre applications that are not in a centre and not in accordance with up-to-date development plan.

14. Chapter 7 of the Local Plan sets out the following development policies applicable to the defined Town Centres of Leamington Spa, Warwick and Kenilworth.

- **Policy TCP1** ('*Protecting and Enhancing the Town Centres*') confirms that proposals for retail and leisure development will be permitted where they are appropriate in scale and function.
- **Policy TCP2** ('*Directing Retail Development*') directs new retail development towards the retail areas of Leamington Spa, Warwick and Kenilworth as defined in the Proposals Map. Where retail opportunities cannot be found in the defined Retail Areas, development will be supported in the following hierarchy:
  - Leamington Spa – towards the new major retail growth area (Policy TCP3);
  - Warwick Town Centre – area designated for mixed use (Policy TCP8);
  - Other sequential sites in edge-of-centre locations.
  - Outside the defined Town Centres, new retail development will be considered in accordance with Policy UAP3.
- **Policy TCP3** ('*Providing for Shopping Growth in Leamington Town Centre*') underlines that large shopping proposals in Leamington Spa within the boundaries defined on the Proposals Map will be permitted on the basis that they satisfy a number of criterion.
- **Policy TCP4** ('*Primary Retail Frontages*') permits the change of use from A1 to other Class A uses within defined Primary Retail Frontages providing that not more than 25% of the total frontage is in non-A1 use. Policy TCP5 ('*Secondary Retail Areas*') permits the change of use from A1 to other Class A uses within Secondary Retail Frontages providing that not more than 50% of the total frontage is in non-A1 use.
- **Policy TCP7** ('*Opportunity Sites in Old Town, Leamington Spa*') identifies the following sites suitable for regeneration proposals Station Area; Wise Street Area; Court Street Area; and Leamington Spa Cultural Quarter.
- **Policy TCP8** ('*Warwick Town Centre Mixed Use Area*') promotes mixed use development within the defined area of Warwick Town Centre on the basis that there is no loss of residential use.

New Local Plan for Warwick District (Preferred Options)

15. The Council are currently preparing the New Local Plan for Warwick District to guide development over the next 18 years. There is an expectation that the New Local Plan will be adopted during 2015. The Preferred Options document published for consultation identified the scope of information which will be addressed in the New Local Plan once it has been progressed and consulted upon further. The document explores the options to be considered relating to all development matters, including town centre and retail development. Chapters 4 and 9 discuss policy objectives which specifically relate to retail and leisure development.

16. Chapter 4 ('Spatial Portrait, Issues and Objectives') establishes a broad overview of population trends and offers a spatial portrait of the District. The Chapter sets out a number of key opportunities and issues facing the District and identifies how these can be addressed in the emerging New Local Plan. With regards to retail issues, paragraph 4.8 recognises the "threat to the economic strength of the town centres of Warwick, Leamington Spa and Kenilworth from retail and leisure developments elsewhere". Paragraph 4.10 identifies a series of objectives which will contribute to achieving sustainable growth in the District. One of these objectives will be to:

> *"Provide a sustainable level of retail and leisure growth that will meet people's existing and future needs, and will maintain and improve the vitality and viability of existing town and local centres as attractive and safe places to visit both by day and night".*

17. In order to meet this objective, the New Local Plan will identify the function of the three Town Centres and manage their future growth to ensure a successful and sustainable level of retail and leisure growth.

18. Chapter 9 ('Retailing and Town Centres') establishes the Council's broad policy objectives relating to leisure, retail and Town Centre development proposals. It reinforces the objectives of the 2007 Local Plan in respect of the settlement hierarchy by confirming the District's main centres as the focus for retail activity. It identifies Leamington Spa as the largest Town Centre with a sub-regional role; Warwick Town Centre fulfilling a dual role for local shopping and tourism; and Kenilworth having a diverse role, but primarily functioning as an important food retail destination.

19. Preferred Option 9 ('Retailing & Town Centres') establishes the Council's preferred approach for developing retail policies. This will address a number of key issues, including:

    - encouraging Town Centres as the primary location for retail development;
    - supporting a major retail regeneration scheme in Leamington Spa Town Centre;
    - resisting out-of-centre retail proposals unless evidence can demonstrate that there would be no adverse impacts on town and local centres;
    - assessing Town Centre opportunity sites to identify their regeneration potential; and
    - developing a framework for creating area action plans (AAPs).

20. The Preferred Options document also states that new retail development centred on Chandos Street would have the potential to meet the need for an uplift in the quantum and quality of retailing in the heart of Leamington town centre.

Warwick Town Centre Plan

21. The Warwick Town Centre Plan is currently being prepared by Warwick District Council in partnership with Warwickshire County Council, Warwick Town Council, Warwick Chamber of Trade and the Warwick Society. The Town Centre Plan forms part of the Local Development Framework and will guide the determination of planning applications for new development and inform other strategies for the Town Centre. The Plan includes a 'vision' for Warwick Town Centre and sets out how the issues identified can be addressed.

22. These considerations are set out in the Preferred Options paper which reflects the responses received during a public consultation that ran between October and December 2012. The Council will publish the results of this consultation in due course and prepare a Draft Plan which is expected to be made available for public consultation towards the end of 2013. The overarching vision for Warwick Town Centre is: "To achieve economic and social success by building on Warwick's distinctive architectural and cultural strengths"

23. The paper highlights the key objectives which will need to be addressed in order to successfully achieve this vision, including improving the mix of shops and services; enhancing the vitality and attractiveness of the Town Centre; providing high-quality visitor accommodation; protecting, maintaining and enhancing historic buildings parks and open spaces; and reducing traffic flow through the Town Centre..

24. The Preferred Options identifies thirty 'Opportunity Sites' that have the potential to come forward for development. The paper recognises that these sites could act as a catalyst for a general improvement to the streetscape and the appearance of the Town Centre for the benefit of residents and tourist alike. The paper sets out the preferred option for each site and identifies their suitability for a range of uses including residential, retail, offices, leisure, hotel, visitor attractions, car parking and service provision.

SUMMARY

25. This Appendix has provided detailed review of the national and local planning policy context material to plan-making and decision-taking of new retail and town centre uses.

26. The underlying objective of policy at all levels is to maintain and enhance the vitality and viability of town centres, and to promote new development in town centre locations *"first"* in accordance with the sequential approach.

2

Goad Category Report

Leamington Spa

Survey Date: **30/12/2012**

GETTING THE MOST FROM YOUR GOAD CATEGORY REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Category Report.

1. The Local Area
When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Category Reports are available for the majority of retail centre that we map.

2. The Indexing System
A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.

For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.

The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space
The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets
Comparing the number of vacant outlets with the GB average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Major Retailers
A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV are often sufficient in itself to attract consumers to a centre. 30 national multiples have been identified as Major Retailers, (i.e. those retailers most likely to improve the consumer appeal of a centre).

The presence of multiple outlets and major retailers can have a significant impact on neighbouring outlets. While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Also available from Experian

The Goad Centre Report
This defines the retail extent and composition of a centre; showing the number of premises in over 27 retail categories and detailing the space allocation across each of them. A comparison of these figures with the national average illustrates under or over representation by category, allowing you to assess the degree of competition or opportunity within the centre.

The Goad Distribution Report
Goad Distribution Reports provides a top-level analysis of the total retail mix and composition of a centre. It shows the number of premises in 16 categories and details the space allocation across each of them.

Retail Planner
Retail Planner is a service for retail planners, property consultants and retailers, providing comprehensive, up-to-date information for retail planning related decisions. Specifically we provide data for three different types of expenditure: Comparison, Convenience and Leisure. Each category is broken down into the European standard COICOP (Classification of Individual Consumption by Purpose) classification. Data is available at output area and postal sector levels. We can also provide data for predefined areas such as Local Authority District Boundaries.

Goad Paper Plans
These provide a bird's eye view of over 1,250 UK retail centres. The name, retail category, floor space and exact location of all outlets and vacant premises is recorded and mapped. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured. There are also over 800 retail park plans available

Goad Digital Plans
Digital plans are available online through our Goad Network system. This enables the user to View, Interrogate Edit & Print plans to their own requirements. For a demonstration logon to http://www.goadnetwork.co.uk/demologin.asp

Tailored Plans and Extracts
We are able to provide tailored plans and extracts which highlight the information most relevant to your enquiry.

The Retail Address Database
An extensive database covering the addresses of 360,000 retail outlets across the UK, this is a highly effective tool for site evaluation and competitor analysis.

For further details on these products or if you have any queries regarding your Goad Category Report, please contact Experian on: Tel: 0845 601 6011
Fax: 0115 968 5003 E-mail: goad.sales@uk.experian.com

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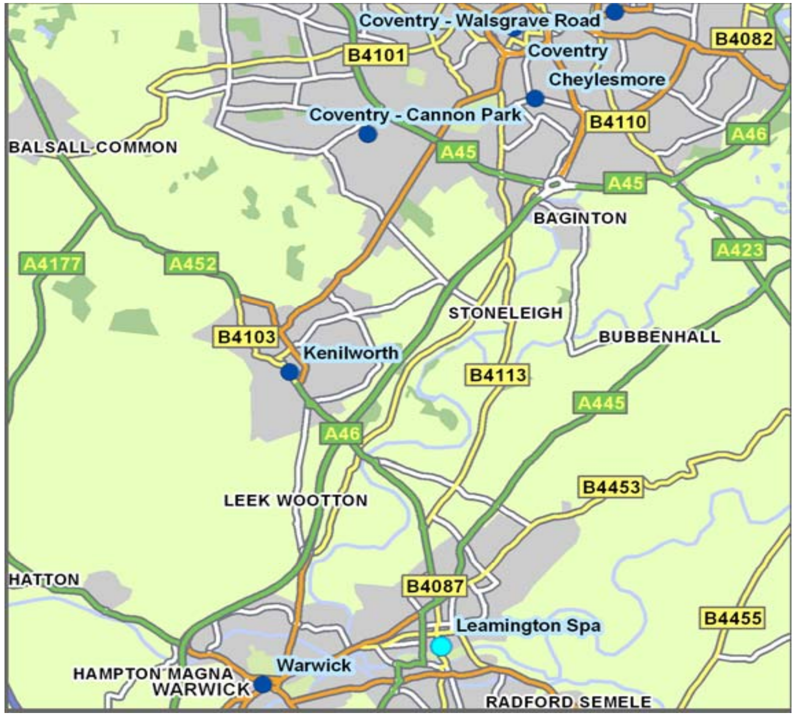


Nearest Location	Distance KM
Warwick	3.62
Kenilworth	6.55
Coventry - Cannon Park	11.00
Cheylesmore	11.81
Coventry	13.24

Major Retailers Present

Department Stores	
BhS	0
Debenhams	0
House of Fraser	1
John Lewis	0
Marks & Spencer	2

Mixed Goods Retailers	
Argos	1
Boots the Chemist	2
T K Maxx	0
W H Smith	1
Wilkinson	0

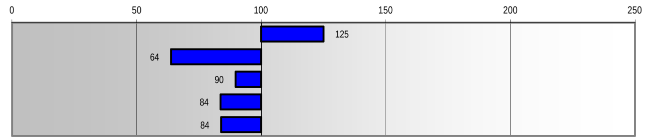
Supermarkets	
Sainsburys	0
Tesco	1
Waitrose	0

Clothing	
Burton	1
Dorothy Perkins	1
H & M	1
New Look	1
Next	1
Primark	0
River Island	1
Topman	2
Topshop	2

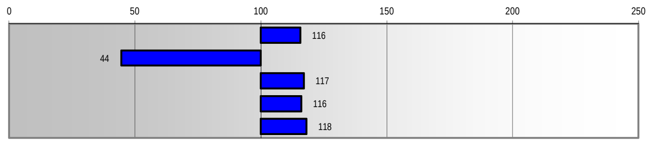
Other Retailers	
Carphone Warehouse	1
Clarks	1
Clintons	1
H M V	1
O2	1
Superdrug	1
Phones 4 U	1
Vodafone	1
Waterstones	1

Multiple Counts & Floorspace by Sector

Counts	Outlets	Area %	Base %	Index
Comparison	115	53.99	43.19	125
Convenience	15	7.04	11.03	64
Retail Service	19	8.92	9.94	90
Leisure Services	35	16.43	19.63	84
Financial & Business Services	29	13.62	16.22	84
Total Multiple Outlets	213			



Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	350,000	55.46	47.93	116
Convenience	63,300	10.03	22.54	44
Retail Service	36,900	5.85	4.99	117
Leisure Services	114,000	18.06	15.56	116
Financial & Business Services	66,900	10.60	8.97	118
Total Multiple Floorspace	631,100			



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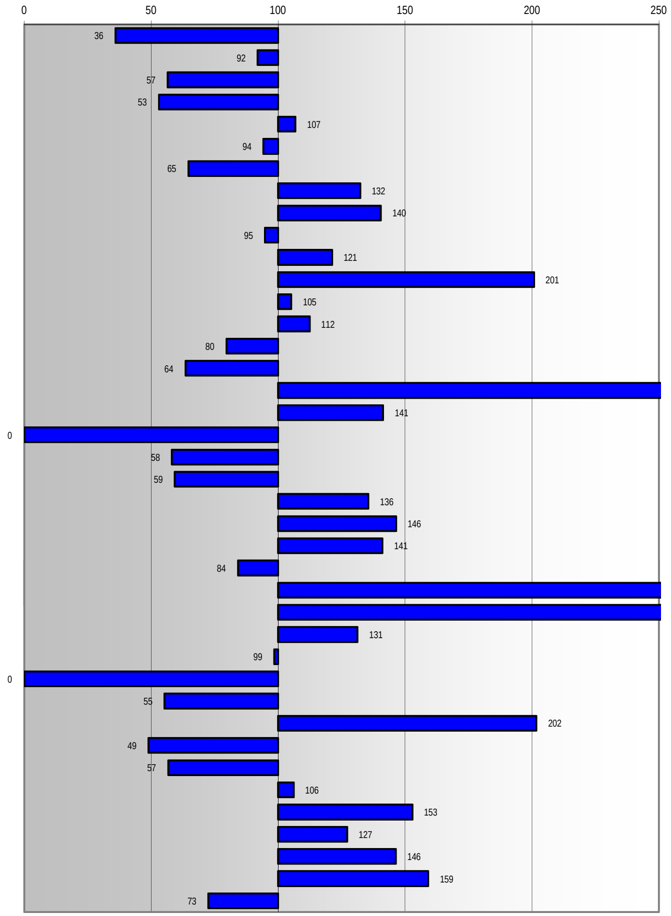
Outlet Counts

Centre: **Leamington Spa** **Survey Date:** **30/12/2012**

Base: **All UK Centres**

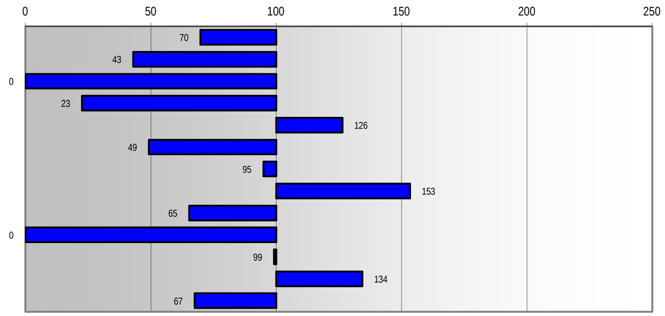
Sector	Classification	Outlets	Area %	Base %	Index
Comparison					
	Antique Shops	1	0.15	0.41	36
	Art & Art Dealers	4	0.59	0.64	92
	Booksellers	2	0.29	0.52	57
	Carpets & Flooring	2	0.29	0.56	53
	Catalogue Showrooms	1	0.15	0.14	107
	Charity Shops	16	2.36	2.50	94
	Chemist & Drugstores	5	0.74	1.14	65
	Childrens & Infants Wear	4	0.59	0.45	132
	Clothing General	20	2.95	2.10	140
	Crafts, Gifts, China & Glass	10	1.47	1.55	95
	Cycles & Accessories	2	0.29	0.24	121
	Department & Variety Stores	5	0.74	0.37	201
	DIY & Home Improvement	5	0.74	0.70	105
	Electrical & Other Durable Goods	11	1.62	1.44	112
	Florists	4	0.59	0.74	80
	Footwear	5	0.74	1.16	64
	Furniture Fitted	10	1.47	0.39	383
	Furniture General	9	1.33	0.94	141
	Gardens & Equipment	0	0.00	0.06	0
	Greeting Cards	3	0.44	0.76	58
	Hardware & Household Goods	6	0.88	1.49	59
	Jewellery, Watches & Silver	16	2.36	1.74	136
	Ladies & Mens Wear & Acc.	12	1.77	1.21	146
	Ladies Wear & Accessories	27	3.98	2.82	141
	Leather & Travel Goods	1	0.15	0.18	84
	Mens Wear & Accessories	15	2.21	0.88	251
	Music & Musical Instruments	3	0.44	0.14	312
	Music & Video Recordings	2	0.29	0.22	131
	Newsagents & Stationers	9	1.33	1.35	99
	Office Supplies	0	0.00	0.03	0
	Other Comparison Goods	3	0.44	0.80	55
	Photographic & Optical	2	0.29	0.15	202
	Secondhand Goods, Books, etc.	1	0.15	0.30	49
	Sports, Camping & Leisure Goods	3	0.44	0.78	57
	Telephones & Accessories	9	1.33	1.25	106
	Textiles & Soft Furnishings	7	1.03	0.68	153
	Toiletries, Cosmetics & Beauty Products	8	1.18	0.93	127
	Toys, Games & Hobbies	8	1.18	0.81	146
	Vehicle & Motorcycle Sales	3	0.44	0.28	159
	Vehicle Accessories	1	0.15	0.20	73
	Totals	**255**	**37.61**	**33.04**	**114**



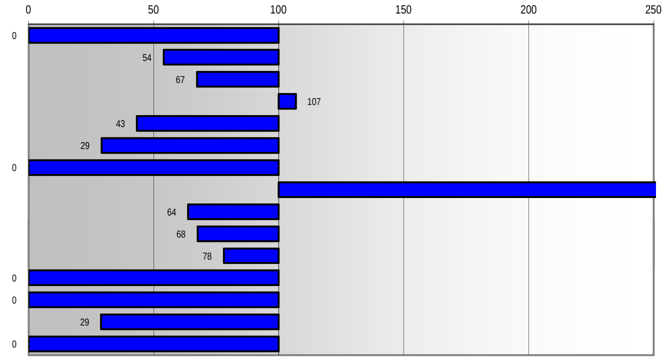
Outlet Counts

Centre: Leamington Spa **Survey Date:** 30/12/2012

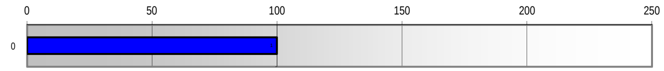
Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	9	1.33	1.90	70
Butchers	2	0.29	0.69	43
CTN	0	0.00	0.22	0
Convenience Stores	2	0.29	1.31	23
Fishmongers	1	0.15	0.12	126
Frozen Foods	1	0.15	0.30	49
Greengrocers	2	0.29	0.31	95
Grocers & Delicatessens	10	1.47	0.96	153
Health Foods	2	0.29	0.45	65
Markets	0	0.00	0.12	0
Off Licences	3	0.44	0.45	99
Shoe Repairs Etc	4	0.59	0.44	134
Supermarkets	4	0.59	0.87	67
Total Convenience	**40**	**5.90**	**8.14**	72



Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.08	0
Dry Cleaners & Launderettes	3	0.44	0.82	54
Filling Stations	1	0.15	0.22	67
Health & Beauty	59	8.70	8.14	107
Opticians	4	0.59	1.36	43
Other Retail Services	1	0.15	0.50	29
Photo Processing	0	0.00	0.15	0
Photo Studio	3	0.44	0.18	252
Post Offices	2	0.29	0.46	64
Repairs, Alterations & Restoration	1	0.15	0.22	68
Travel Agents	5	0.74	0.94	78
TV, Cable & Video Rental	0	0.00	0.02	0
Vehicle Rental	0	0.00	0.06	0
Vehicle Repairs & Services	1	0.15	0.51	29
Video Tape Rental	0	0.00	0.16	0
Totals	**80**	**11.80**	**13.82**	**85**



Other Retail	Outlets	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.16**	**0**



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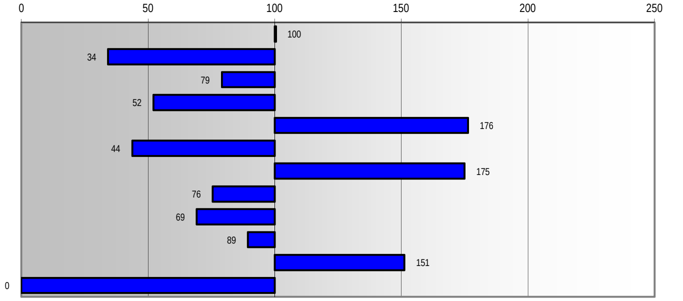
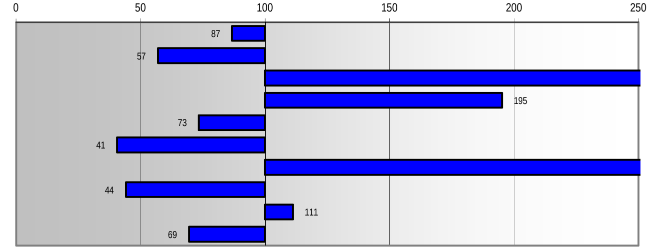
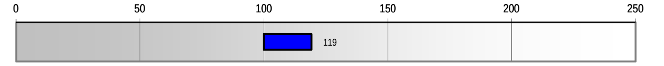
Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	10	1.47	1.47	100
Bingo & Amusements	1	0.15	0.43	34
Cafes	22	3.24	4.10	79
Casinos & Betting Offices	5	0.74	1.41	52
Cinemas, Theatres & Concert Halls	3	0.44	0.25	176
Clubs	2	0.29	0.67	44
Disco, Dance & Nightclubs	3	0.44	0.25	175
Fast Food & Take Away	28	4.13	5.47	76
Hotels & Guest Houses	3	0.44	0.64	69
Public Houses	17	2.51	2.80	89
Restaurants	45	6.64	4.39	151
Sports & Leisure Facilities	0	0.00	0.27	0
Totals	**139**	**20.50**	**22.16**	**93**



Financial & Business Services				
Building Societies	3	0.44	0.51	87
Building Supplies & Services	2	0.29	0.52	57
Business Goods & Services	1	0.15	0.03	524
Employment & Careers	6	0.88	0.45	195
Financial Services	7	1.03	1.41	73
Legal Services	3	0.44	1.09	41
Other Business Services	9	1.33	0.45	296
Printing & Copying	1	0.15	0.33	44
Property Services	26	3.83	3.45	111
Retail Banks	13	1.92	2.76	69
Totals	**71**	**10.47**	**11.00**	**95**

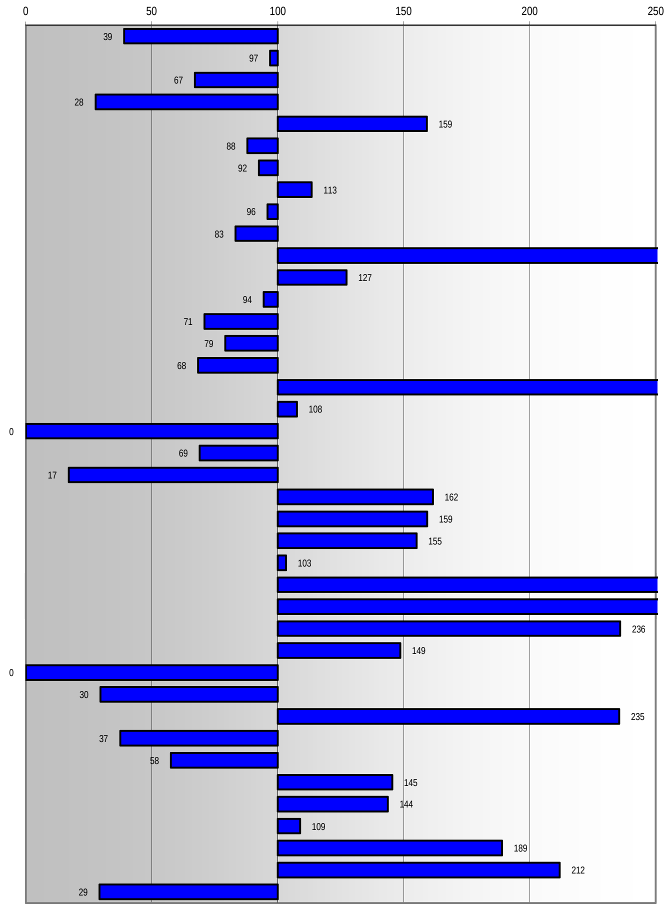


Vacant Outlets				
Vacant Retail & Service Outlets	**93**	**13.72**	**11.50**	**119**



Total Number of Outlets **678**

Sector	Classification	Floorspace	Area %	Base %	Index
Comparison		Floorspace	Area %	Base %	Index
	Antique Shops	1,100	0.08	0.22	39
	Art & Art Dealers	4,500	0.35	0.36	97
	Booksellers	3,800	0.29	0.43	67
	Carpets & Flooring	2,000	0.15	0.55	28
	Catalogue Showrooms	10,900	0.84	0.53	159
	Charity Shops	18,300	1.40	1.60	88
	Chemist & Drugstores	18,800	1.44	1.56	92
	Childrens & Infants Wear	5,300	0.41	0.36	113
	Clothing General	43,100	3.31	3.45	96
	Crafts, Gifts, China & Glass	8,500	0.65	0.78	83
	Cycles & Accessories	8,300	0.64	0.19	343
	Department & Variety Stores	74,900	5.75	4.51	127
	DIY & Home Improvement	14,300	1.10	1.16	94
	Electrical & Other Durable Goods	11,300	0.87	1.22	71
	Florists	2,800	0.21	0.27	79
	Footwear	8,500	0.65	0.95	68
	Furniture Fitted	14,800	1.14	0.36	316
	Furniture General	21,100	1.62	1.50	108
	Gardens & Equipment	0	0.00	0.07	0
	Greeting Cards	4,600	0.35	0.51	69
	Hardware & Household Goods	7,700	0.59	3.45	17
	Jewellery, Watches & Silver	15,700	1.20	0.75	162
	Ladies & Mens Wear & Acc.	34,400	2.64	1.66	159
	Ladies Wear & Accessories	52,200	4.00	2.58	155
	Leather & Travel Goods	1,300	0.10	0.10	103
	Mens Wear & Accessories	24,200	1.86	0.72	256
	Music & Musical Instruments	3,200	0.25	0.09	259
	Music & Video Recordings	7,500	0.58	0.24	236
	Newsagents & Stationers	18,800	1.44	0.97	149
	Office Supplies	0	0.00	0.07	0
	Other Comparison Goods	2,400	0.18	0.62	30
	Photographic & Optical	2,100	0.16	0.07	235
	Secondhand Goods, Books, etc.	700	0.05	0.14	37
	Sports, Camping & Leisure Goods	7,600	0.58	1.01	58
	Telephones & Accessories	12,700	0.97	0.67	145
	Textiles & Soft Furnishings	9,200	0.71	0.49	144
	Toiletries, Cosmetics & Beauty Products	12,500	0.96	0.88	109
	Toys, Games & Hobbies	16,300	1.25	0.66	189
	Vehicle & Motorcycle Sales	15,400	1.18	0.56	212
	Vehicle Accessories	900	0.07	0.24	29
	Totals	**521,700**	**40.02**	**36.56**	**109**



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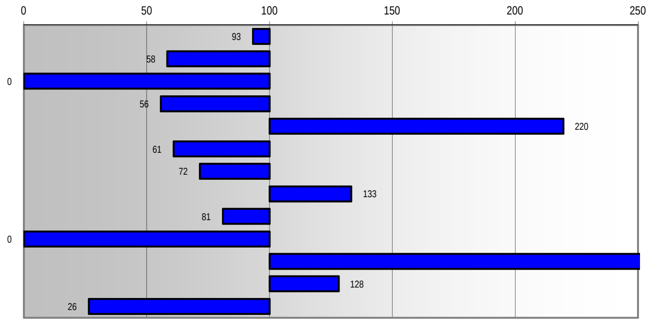
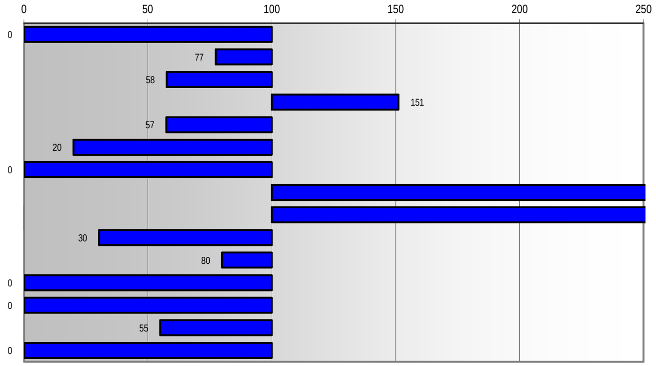
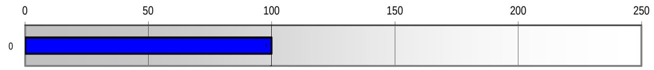
Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	10,900	0.84	0.90	93
Butchers	2,600	0.20	0.34	58
CTN	0	0.00	0.12	0
Convenience Stores	9,600	0.74	1.32	56
Fishmongers	1,400	0.11	0.05	220
Frozen Foods	6,400	0.49	0.80	61
Greengrocers	1,400	0.11	0.15	72
Grocers & Delicatessens	9,000	0.69	0.52	133
Health Foods	2,700	0.21	0.26	81
Markets	0	0.00	0.87	0
Off Licences	8,400	0.64	0.25	254
Shoe Repairs Etc	2,000	0.15	0.12	128
Supermarkets	30,800	2.36	8.94	26
Total Convenience	**85,200**	**6.54**	**14.64**	**45**



Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.04	0
Dry Cleaners & Launderettes	3,500	0.27	0.35	77
Filling Stations	900	0.07	0.12	58
Health & Beauty	71,800	5.51	3.64	151
Opticians	5,900	0.45	0.79	57
Other Retail Services	900	0.07	0.35	20
Photo Processing	0	0.00	0.05	0
Photo Studio	7,100	0.54	0.07	737
Post Offices	18,300	1.40	0.49	286
Repairs, Alterations & Restoration	300	0.02	0.08	30
Travel Agents	5,300	0.41	0.51	80
TV, Cable & Video Rental	0	0.00	0.00	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	4,700	0.36	0.66	55
Video Tape Rental	0	0.00	0.15	0
Totals	**118,700**	**9.10**	**7.36**	**124**



Other Retail	Floorspace	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.12**	**0**



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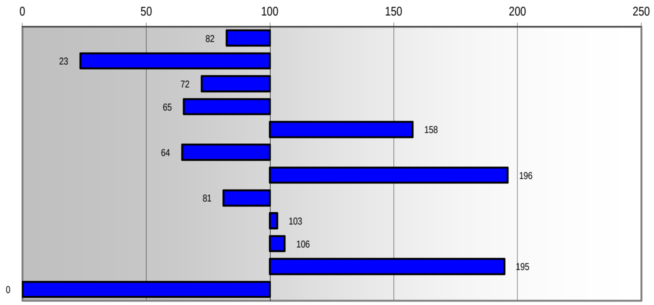
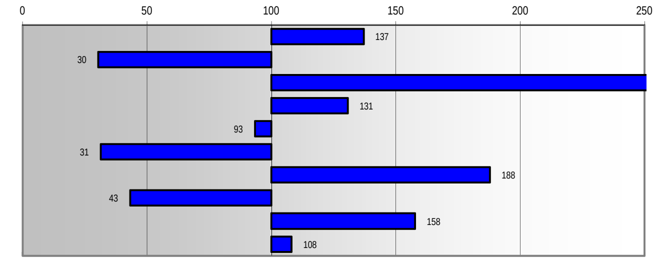
Floorspace Sq Ft   Centre: Leamington Spa   Survey Date: 30/12/2012

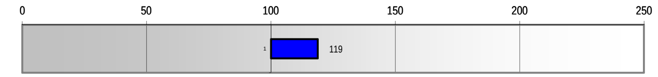
Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	19,700	1.51	1.83	82
Bingo & Amusements	2,800	0.21	0.92	23
Cafes	20,100	1.54	2.13	72
Casinos & Betting Offices	9,200	0.71	1.08	65
Cinemas, Theatres & Concert Halls	34,200	2.62	1.66	158
Clubs	9,700	0.74	1.15	64
Disco, Dance & Nightclubs	13,800	1.06	0.54	196
Fast Food & Take Away	27,800	2.13	2.62	81
Hotels & Guest Houses	25,800	1.98	1.92	103
Public Houses	51,500	3.95	3.73	106
Restaurants	97,200	7.46	3.83	195
Sports & Leisure Facilities	0	0.00	1.59	0
Totals	**311,800**	**23.92**	**23.01**	**104**



Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	7,000	0.54	0.39	137
Building Supplies & Services	1,900	0.15	0.48	30
Business Goods & Services	500	0.04	0.01	263
Employment & Careers	5,000	0.38	0.29	131
Financial Services	9,600	0.74	0.79	93
Legal Services	3,200	0.25	0.78	31
Other Business Services	12,400	0.95	0.51	188
Printing & Copying	1,100	0.08	0.20	43
Property Services	36,800	2.82	1.79	158
Retail Banks	44,200	3.39	3.13	108
Totals	**121,700**	**9.33**	**8.37**	**112**



Vacant Outlets				
Vacant Retail & Service Outlets	**144,600**	**11.09**	**9.34**	**119**



Total Floorspace **1,303,700**

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TERMS AND CONDITIONS

1. DEFINITIONS
"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES
3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

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Goad Category Report

Warwick

Survey Date: **22/02/2013**

GETTING THE MOST FROM YOUR GOAD CATEGORY REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Category Report.

1. The Local Area
When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Category Reports are available for the majority of retail centre that we map.

2. The Indexing System
A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.

For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.

The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space
The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets
Comparing the number of vacant outlets with the GB average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Major Retailers
A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV are often sufficient in itself to attract consumers to a centre. 30 national multiples have been identified as Major Retailers, (i.e. those retailers most likely to improve the consumer appeal of a centre).

The presence of multiple outlets and major retailers can have a significant impact on neighbouring outlets. While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Also available from Experian

The Goad Centre Report
This defines the retail extent and composition of a centre; showing the number of premises in over 27 retail categories and detailing the space allocation across each of them. A comparison of these figures with the national average illustrates under or over representation by category, allowing you to assess the degree of competition or opportunity within the centre.

The Goad Distribution Report
Goad Distribution Reports provides a top-level analysis of the total retail mix and composition of a centre. It shows the number of premises in 16 categories and details the space allocation across each of them.

Retail Planner
Retail Planner is a service for retail planners, property consultants and retailers, providing comprehensive, up-to-date information for retail planning related decisions. Specifically we provide data for three different types of expenditure: Comparison, Convenience and Leisure. Each category is broken down into the European standard COICOP (Classification of Individual Consumption by Purpose) classification. Data is available at output area and postal sector levels. We can also provide data for predefined areas such as Local Authority District Boundaries.

Goad Paper Plans
These provide a bird's eye view of over 1,250 UK retail centres. The name, retail category, floor space and exact location of all outlets and vacant premises is recorded and mapped. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured. There are also over 800 retail park plans available

Goad Digital Plans
Digital plans are available online through our Goad Network system. This enables the user to View, Interrogate Edit & Print plans to their own requirements. For a demonstration logon to
http://www.goadnetwork.co.uk/demologin.asp

Tailored Plans and Extracts
We are able to provide tailored plans and extracts which highlight the information most relevant to your enquiry.

The Retail Address Database
An extensive database covering the addresses of 360,000 retail outlets across the UK, this is a highly effective tool for site evaluation and competitor analysis.

For further details on these products or if you have any queries regarding your Goad Category Report, please contact Experian on: Tel: 0845 601 6011
Fax: 0115 968 5003 E-mail:
goad.sales@uk.experian.com

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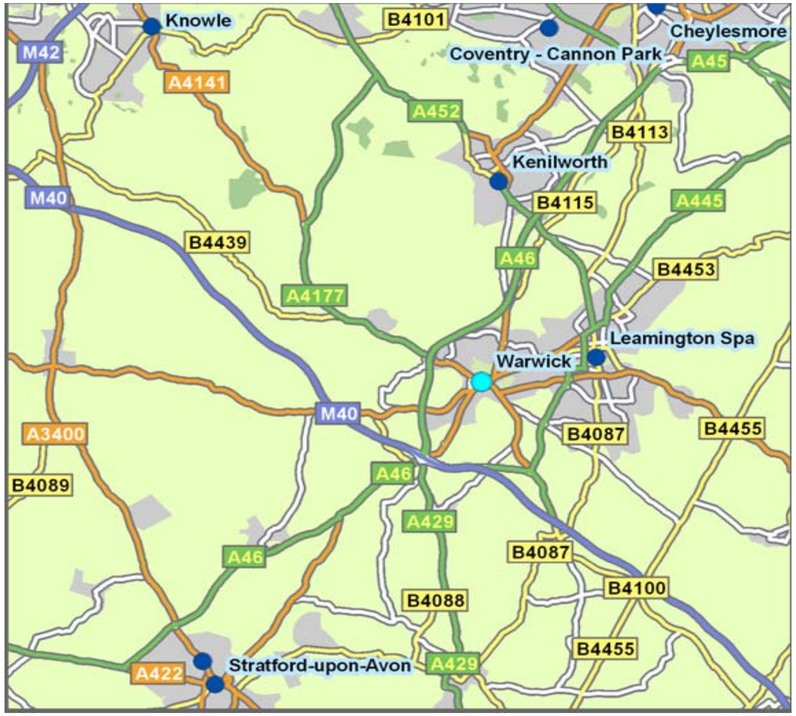


Nearest Location	Distance KM
Leamington Spa	3.62
Kenilworth	6.66
Coventry - Cannon Park	11.90
Stratford-upon-Avon - Birmingham Road	12.60
Stratford-upon-Avon	12.93

Major Retailers Present

Department Stores

BhS	0
Debenhams	0
House of Fraser	0
John Lewis	0
Marks & Spencer	1

Mixed Goods Retailers

Argos	0
Boots the Chemist	1
T K Maxx	0
W H Smith	1
Wilkinson	0

Supermarkets

Sainsburys	2
Tesco	0
Waitrose	0

Clothing

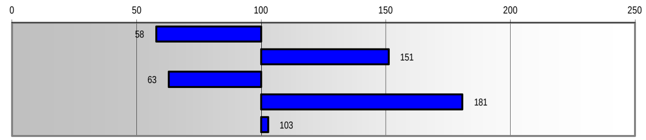
Burton	0
Dorothy Perkins	0
H & M	0
New Look	0
Next	0
Primark	0
River Island	0
Topman	0
Topshop	0

Other Retailers

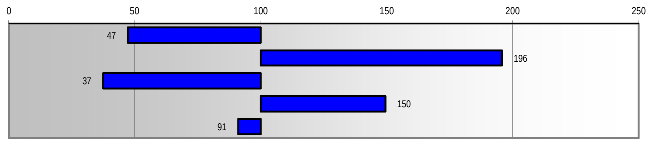
Carphone Warehouse	0
Clarks	0
Clintons	0
H M V	0
O2	0
Superdrug	1
Phones 4 U	0
Vodafone	0
Waterstones	0

Multiple Counts & Floorspace by Sector

Counts	Outlets	Area %	Base %	Index
Comparison	12	25.00	43.22	58
Convenience	8	16.67	11.03	151
Retail Service	3	6.25	9.94	63
Leisure Services	17	35.42	19.60	181
Financial & Business Services	8	16.67	16.22	103
Total Multiple Outlets	**48**			



Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	33,800	22.67	47.97	47
Convenience	65,600	44.00	22.47	196
Retail Service	2,800	1.88	5.01	37
Leisure Services	34,700	23.27	15.56	150
Financial & Business Services	12,200	8.18	8.99	91
Total Multiple Floorspace	**149,100**			



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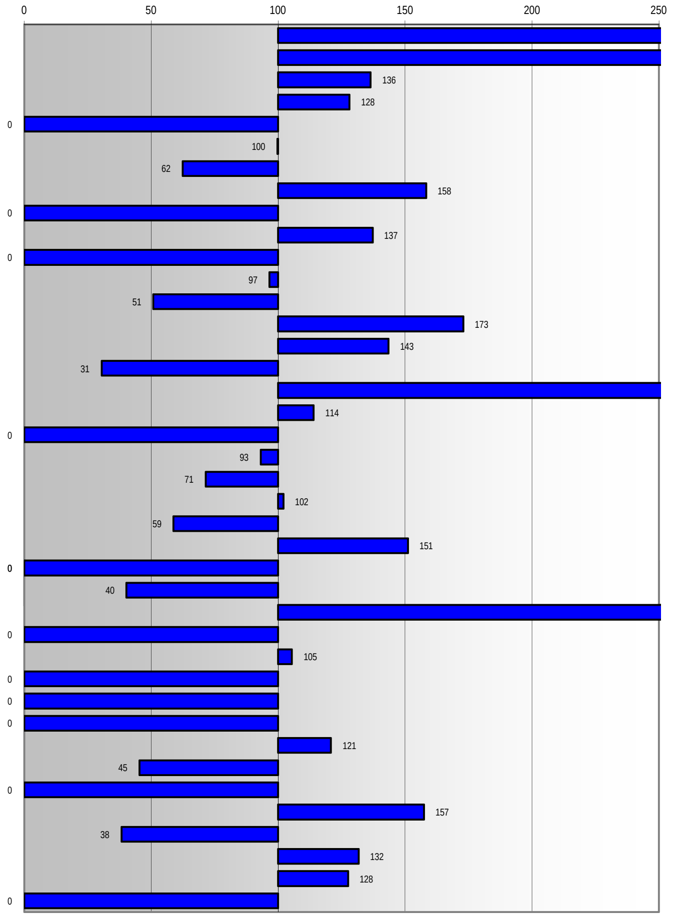
Outlet Counts

Centre: **Warwick** **Survey Date:** **22/02/2013**

Base: **All UK Centres**

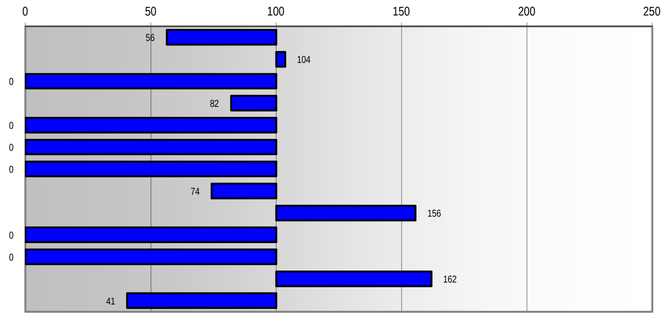
Sector	Classification	Outlets	Area %	Base %	Index
Comparison		**Outlets**	**Area %**	**Base %**	**Index**
	Antique Shops	5	1.78	0.41	435
	Art & Art Dealers	5	1.78	0.64	276
	Booksellers	2	0.71	0.52	136
	Carpets & Flooring	2	0.71	0.56	128
	Catalogue Showrooms	0	0.00	0.14	0
	Charity Shops	7	2.49	2.50	100
	Chemist & Drugstores	2	0.71	1.14	62
	Childrens & Infants Wear	2	0.71	0.45	158
	Clothing General	0	0.00	2.11	0
	Crafts, Gifts, China & Glass	6	2.14	1.56	137
	Cycles & Accessories	0	0.00	0.24	0
	Department & Variety Stores	1	0.36	0.37	97
	DIY & Home Improvement	1	0.36	0.70	51
	Electrical & Other Durable Goods	7	2.49	1.44	173
	Florists	3	1.07	0.74	143
	Footwear	1	0.36	1.17	31
	Furniture Fitted	3	1.07	0.39	275
	Furniture General	3	1.07	0.94	114
	Gardens & Equipment	0	0.00	0.06	0
	Greeting Cards	2	0.71	0.76	93
	Hardware & Household Goods	3	1.07	1.49	71
	Jewellery, Watches & Silver	5	1.78	1.74	102
	Ladies & Mens Wear & Acc.	2	0.71	1.21	59
	Ladies Wear & Accessories	12	4.27	2.83	151
	Leather & Travel Goods	0	0.00	0.17	0
	Mens Wear & Accessories	1	0.36	0.88	40
	Music & Musical Instruments	2	0.71	0.14	508
	Music & Video Recordings	0	0.00	0.23	0
	Newsagents & Stationers	4	1.42	1.35	105
	Office Supplies	0	0.00	0.03	0
	Other Comparison Goods	0	0.00	0.80	0
	Photographic & Optical	0	0.00	0.15	0
	Secondhand Goods, Books, etc.	1	0.36	0.29	121
	Sports, Camping & Leisure Goods	1	0.36	0.78	45
	Telephones & Accessories	0	0.00	1.25	0
	Textiles & Soft Furnishings	3	1.07	0.68	157
	Toiletries, Cosmetics & Beauty Products	1	0.36	0.93	38
	Toys, Games & Hobbies	3	1.07	0.81	132
	Vehicle & Motorcycle Sales	1	0.36	0.28	128
	Vehicle Accessories	0	0.00	0.20	0
	Totals	**91**	**32.38**	**33.07**	**98**



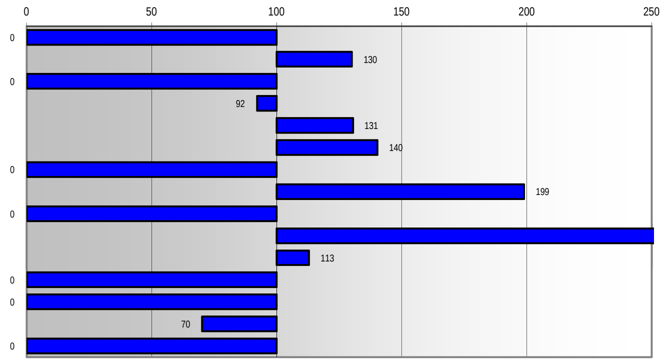
Outlet Counts

Centre: Warwick **Survey Date:** 22/02/2013

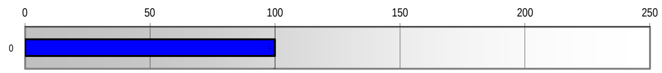
Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	3	1.07	1.90	56
Butchers	2	0.71	0.69	104
CTN	0	0.00	0.22	0
Convenience Stores	3	1.07	1.30	82
Fishmongers	0	0.00	0.12	0
Frozen Foods	0	0.00	0.30	0
Greengrocers	0	0.00	0.31	0
Grocers & Delicatessens	2	0.71	0.96	74
Health Foods	2	0.71	0.46	156
Markets	0	0.00	0.11	0
Off Licences	0	0.00	0.45	0
Shoe Repairs Etc	2	0.71	0.44	162
Supermarkets	1	0.36	0.88	41
Total Convenience	**15**	**5.34**	**8.13**	66



Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.08	0
Dry Cleaners & Launderettes	3	1.07	0.82	130
Filling Stations	0	0.00	0.22	0
Health & Beauty	21	7.47	8.11	92
Opticians	5	1.78	1.36	131
Other Retail Services	2	0.71	0.51	140
Photo Processing	0	0.00	0.15	0
Photo Studio	1	0.36	0.18	199
Post Offices	0	0.00	0.46	0
Repairs, Alterations & Restoration	2	0.71	0.22	324
Travel Agents	3	1.07	0.95	113
TV, Cable & Video Rental	0	0.00	0.02	0
Vehicle Rental	0	0.00	0.06	0
Vehicle Repairs & Services	1	0.36	0.51	70
Video Tape Rental	0	0.00	0.16	0
Totals	**38**	**13.52**	**13.80**	**98**



Other Retail	Outlets	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.16**	**0**



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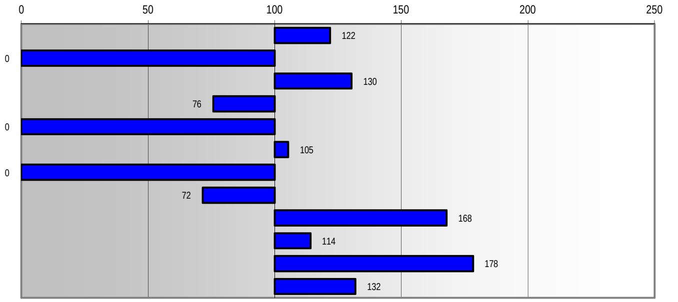
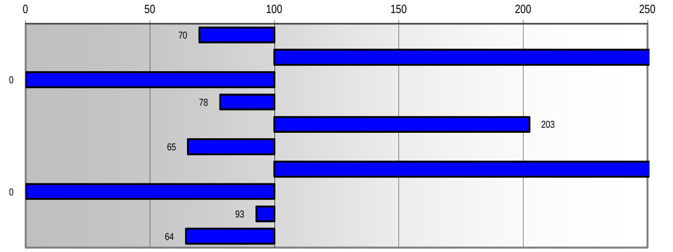
Outlet Counts

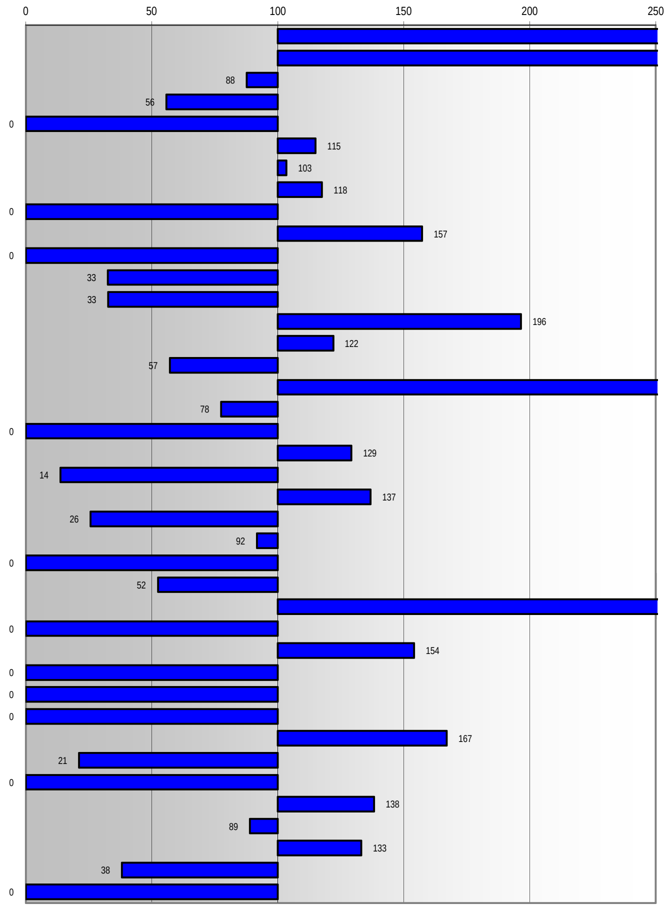
Centre: Warwick **Survey Date:** 22/02/2013

Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	5	1.78	1.46	122
Bingo & Amusements	0	0.00	0.43	0
Cafes	15	5.34	4.09	130
Casinos & Betting Offices	3	1.07	1.41	76
Cinemas, Theatres & Concert Halls	0	0.00	0.25	0
Clubs	2	0.71	0.68	105
Disco, Dance & Nightclubs	0	0.00	0.25	0
Fast Food & Take Away	11	3.91	5.47	72
Hotels & Guest Houses	3	1.07	0.64	168
Public Houses	9	3.20	2.81	114
Restaurants	22	7.83	4.39	178
Sports & Leisure Facilities	1	0.36	0.27	132
Totals	**71**	**25.27**	**22.14**	**114**
Financial & Business Services				
Building Societies	1	0.36	0.51	70
Building Supplies & Services	5	1.78	0.52	340
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	1	0.36	0.46	78
Financial Services	8	2.85	1.41	203
Legal Services	2	0.71	1.09	65
Other Business Services	5	1.78	0.45	393
Printing & Copying	0	0.00	0.34	0
Property Services	9	3.20	3.45	93
Retail Banks	5	1.78	2.76	64
Totals	**36**	**12.81**	**11.01**	**116**
Vacant Outlets				
Vacant Retail & Service Outlets	**30**	**10.68**	**11.51**	**93**
Total Number of Outlets	**281**			



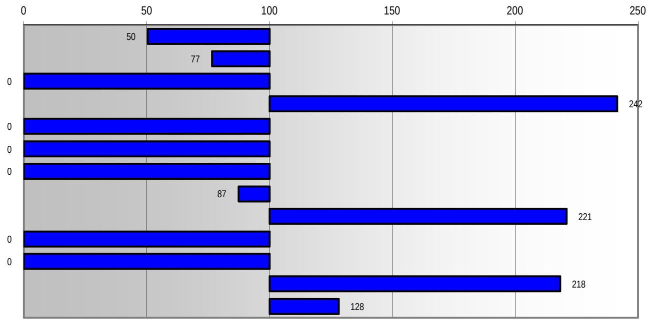


Sector	Classification	Floorspace	Area %	Base %	Index
Comparison					
	Antique Shops	9,100	2.16	0.22	1,003
	Art & Art Dealers	5,300	1.26	0.36	353
	Booksellers	1,600	0.38	0.43	88
	Carpets & Flooring	1,300	0.31	0.55	56
	Catalogue Showrooms	0	0.00	0.53	0
	Charity Shops	7,700	1.83	1.59	115
	Chemist & Drugstores	6,800	1.62	1.56	103
	Childrens & Infants Wear	1,800	0.43	0.36	118
	Clothing General	0	0.00	3.46	0
	Crafts, Gifts, China & Glass	5,200	1.24	0.79	157
	Cycles & Accessories	0	0.00	0.19	0
	Department & Variety Stores	6,200	1.47	4.53	33
	DIY & Home Improvement	1,600	0.38	1.16	33
	Electrical & Other Durable Goods	10,100	2.40	1.22	196
	Florists	1,400	0.33	0.27	122
	Footwear	2,300	0.55	0.96	57
	Furniture Fitted	11,000	2.61	0.36	722
	Furniture General	4,900	1.16	1.50	78
	Gardens & Equipment	0	0.00	0.07	0
	Greeting Cards	2,800	0.67	0.51	129
	Hardware & Household Goods	2,000	0.48	3.45	14
	Jewellery, Watches & Silver	4,300	1.02	0.75	137
	Ladies & Mens Wear & Acc.	1,800	0.43	1.66	26
	Ladies Wear & Accessories	10,000	2.38	2.59	92
	Leather & Travel Goods	0	0.00	0.10	0
	Mens Wear & Accessories	1,600	0.38	0.72	52
	Music & Musical Instruments	1,700	0.40	0.09	430
	Music & Video Recordings	0	0.00	0.25	0
	Newsagents & Stationers	6,300	1.50	0.97	154
	Office Supplies	0	0.00	0.07	0
	Other Comparison Goods	0	0.00	0.62	0
	Photographic & Optical	0	0.00	0.07	0
	Secondhand Goods, Books, etc.	1,000	0.24	0.14	167
	Sports, Camping & Leisure Goods	900	0.21	1.01	21
	Telephones & Accessories	0	0.00	0.67	0
	Textiles & Soft Furnishings	2,900	0.69	0.50	138
	Toiletries, Cosmetics & Beauty Products	3,300	0.78	0.88	89
	Toys, Games & Hobbies	3,700	0.88	0.66	133
	Vehicle & Motorcycle Sales	900	0.21	0.56	38
	Vehicle Accessories	0	0.00	0.24	0
	Totals	**119,500**	**28.38**	**36.63**	**77**

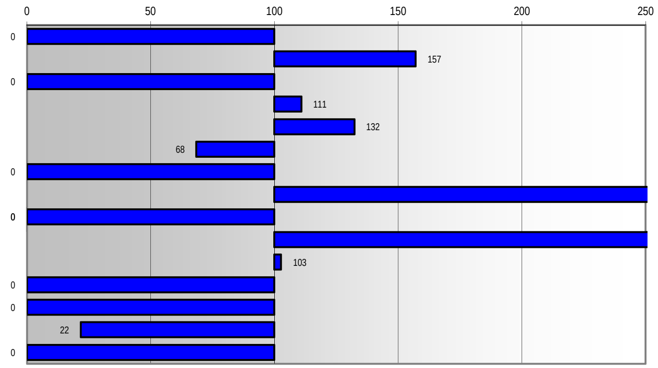


Floorspace Sq Ft   Centre: Warwick   Survey Date: 22/02/2013

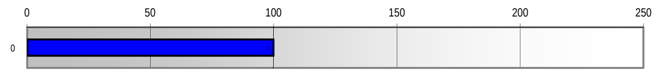
Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	1,900	0.45	0.89	50
Butchers	1,100	0.26	0.34	77
CTN	0	0.00	0.12	0
Convenience Stores	13,300	3.16	1.31	242
Fishmongers	0	0.00	0.05	0
Frozen Foods	0	0.00	0.80	0
Greengrocers	0	0.00	0.15	0
Grocers & Delicatessens	1,900	0.45	0.52	87
Health Foods	2,400	0.57	0.26	221
Markets	0	0.00	0.87	0
Off Licences	0	0.00	0.25	0
Shoe Repairs Etc	1,100	0.26	0.12	218
Supermarkets	48,200	11.45	8.93	128
Total Convenience	**69,900**	**16.60**	**14.60**	**114**



Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.04	0
Dry Cleaners & Launderettes	2,300	0.55	0.35	157
Filling Stations	0	0.00	0.12	0
Health & Beauty	17,000	4.04	3.64	111
Opticians	4,400	1.05	0.79	132
Other Retail Services	1,000	0.24	0.35	68
Photo Processing	0	0.00	0.05	0
Photo Studio	1,200	0.29	0.08	372
Post Offices	0	0.00	0.49	0
Repairs, Alterations & Restoration	1,600	0.38	0.08	493
Travel Agents	2,200	0.52	0.51	103
TV, Cable & Video Rental	0	0.00	0.01	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	600	0.14	0.66	22
Video Tape Rental	0	0.00	0.15	0
Totals	**30,300**	**7.20**	**7.36**	**98**



Other Retail	Floorspace	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.12**	**0**



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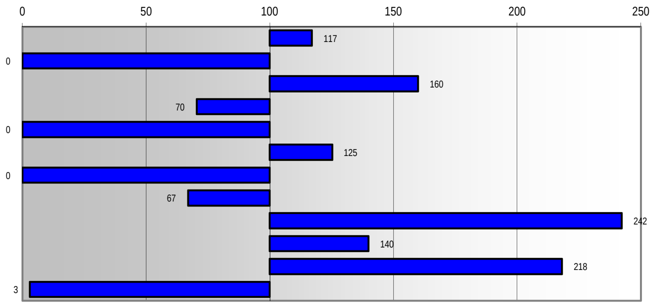
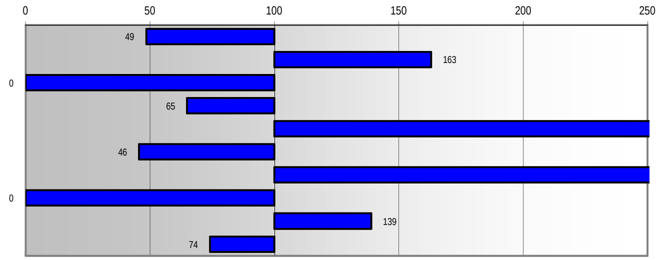
Floorspace Sq Ft

Centre: **Warwick** **Survey Date:** **22/02/2013**

Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	9,000	2.14	1.83	117
Bingo & Amusements	0	0.00	0.92	0
Cafes	14,300	3.40	2.12	160
Casinos & Betting Offices	3,200	0.76	1.08	70
Cinemas, Theatres & Concert Halls	0	0.00	1.67	0
Clubs	6,100	1.45	1.16	125
Disco, Dance & Nightclubs	0	0.00	0.54	0
Fast Food & Take Away	7,400	1.76	2.62	67
Hotels & Guest Houses	19,600	4.66	1.92	242
Public Houses	22,000	5.23	3.73	140
Restaurants	35,100	8.34	3.82	218
Sports & Leisure Facilities	200	0.05	1.57	3
Totals	**116,900**	**27.77**	**22.98**	**121**



Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	800	0.19	0.39	49
Building Supplies & Services	3,300	0.78	0.48	163
Business Goods & Services	0	0.00	0.01	0
Employment & Careers	800	0.19	0.29	65
Financial Services	9,500	2.26	0.79	287
Legal Services	1,500	0.36	0.78	46
Other Business Services	15,900	3.78	0.50	748
Printing & Copying	0	0.00	0.20	0
Property Services	10,500	2.49	1.79	139
Retail Banks	9,800	2.33	3.14	74
Totals	**52,100**	**12.38**	**8.38**	**148**



Vacant Outlets				
Vacant Retail & Service Outlets	**32,300**	**7.67**	**9.30**	**82**

Total Floorspace **421,000**

TERMS AND CONDITIONS

1. DEFINITIONS
"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES
3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

Experian™
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Goad Category Report

Kenilworth

Survey Date: **09/01/2012**

GETTING THE MOST FROM YOUR GOAD CATEGORY REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Category Report.

1. The Local Area
When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Category Reports are available for the majority of retail centre that we map.

2. The Indexing System
A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.

For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.

The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space
The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets
Comparing the number of vacant outlets with the GB average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Major Retailers
A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of a centre to local consumers. The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV are often sufficient in itself to attract consumers to a centre. 30 national multiples have been identified as Major Retailers, (i.e. those retailers most likely to improve the consumer appeal of a centre).

The presence of multiple outlets and major retailers can have a significant impact on neighbouring outlets. While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Also available from Experian

The Goad Centre Report
This defines the retail extent and composition of a centre; showing the number of premises in over 27 retail categories and detailing the space allocation across each of them. A comparison of these figures with the national average illustrates under or over representation by category, allowing you to assess the degree of competition or opportunity within the centre.

The Goad Distribution Report
Goad Distribution Reports provides a top-level analysis of the total retail mix and composition of a centre. It shows the number of premises in 16 categories and details the space allocation across each of them.

Retail Planner
Retail Planner is a service for retail planners, property consultants and retailers, providing comprehensive, up-to-date information for retail planning related decisions. Specifically we provide data for three different types of expenditure: Comparison, Convenience and Leisure. Each category is broken down into the European standard COICOP (Classification of Individual Consumption by Purpose) classification. Data is available at output area and postal sector levels. We can also provide data for predefined areas such as Local Authority District Boundaries.

Goad Paper Plans
These provide a bird's eye view of over 1,250 UK retail centres. The name, retail category, floor space and exact location of all outlets and vacant premises is recorded and mapped. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured. There are also over 800 retail park plans available

Goad Digital Plans
Digital plans are available online through our Goad Network system. This enables the user to View, Interrogate Edit & Print plans to their own requirements. For a demonstration logon to
http://www.goadnetwork.co.uk/demologin.asp

Tailored Plans and Extracts
We are able to provide tailored plans and extracts which highlight the information most relevant to your enquiry.

The Retail Address Database
An extensive database covering the addresses of 360,000 retail outlets across the UK, this is a highly effective tool for site evaluation and competitor analysis.

For further details on these products or if you have any queries regarding your Goad Category Report, please contact Experian on: Tel: 0845 601 6011
Fax: 0115 968 5003 E-mail:
goad.sales@uk.experian.com

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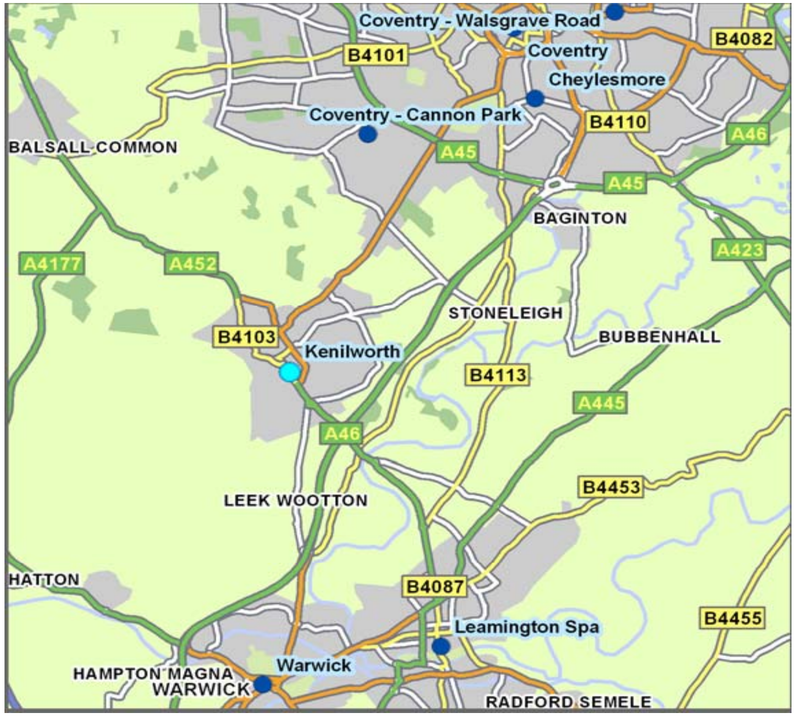


Nearest Location	Distance KM
Coventry - Cannon Park	5.31
Leamington Spa	6.55
Warwick	6.66
Cheylesmore	7.59
Coventry	8.58

Major Retailers Present

Department Stores

BhS	0
Debenhams	0
House of Fraser	0
John Lewis	0
Marks & Spencer	0

Mixed Goods Retailers

Argos	0
Boots the Chemist	3
T K Maxx	0
W H Smith	1
Wilkinson	1

Supermarkets

Sainsburys	1
Tesco	0
Waitrose	1

Clothing

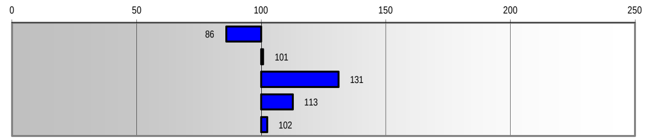
Burton	0
Dorothy Perkins	0
H & M	0
New Look	0
Next	0
Primark	0
River Island	0
Topman	0
Topshop	0

Other Retailers

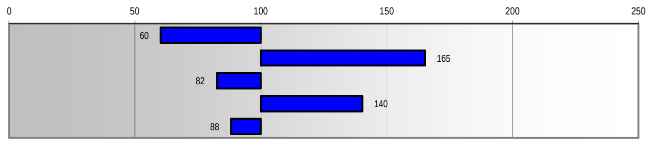
Carphone Warehouse	0
Clarks	1
Clintons	0
H M V	0
O2	0
Superdrug	1
Phones 4 U	0
Vodafone	0
Waterstones	0

Multiple Counts & Floorspace by Sector

Counts	Outlets	Area %	Base %	Index
Comparison	20	37.04	43.07	86
Convenience	6	11.11	11.02	101
Retail Service	7	12.96	9.90	131
Leisure Services	12	22.22	19.72	113
Financial & Business Services	9	16.67	16.28	102
Total Multiple Outlets	54			



Floorspace Sq Ft	Outlets	Area %	Base %	Index
Comparison	55,300	28.86	47.94	60
Convenience	71,200	37.16	22.48	165
Retail Service	7,800	4.07	4.94	82
Leisure Services	42,200	22.03	15.70	140
Financial & Business Services	15,100	7.88	8.94	88
Total Multiple Floorspace	191,600			



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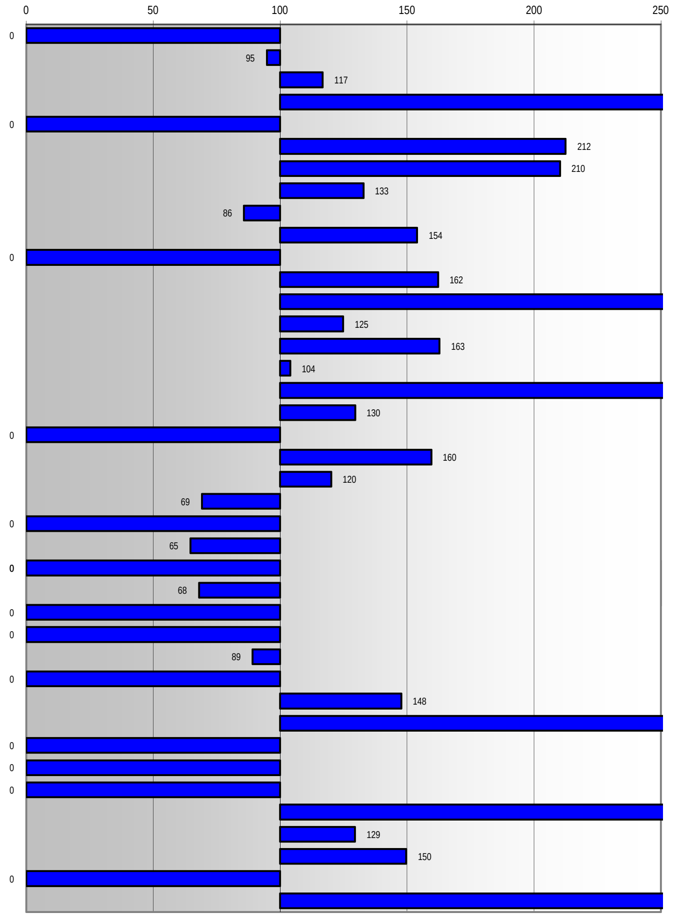
Outlet Counts

Centre: **Kenilworth** **Survey Date:** **09/01/2012**

Base: **All UK Centres**

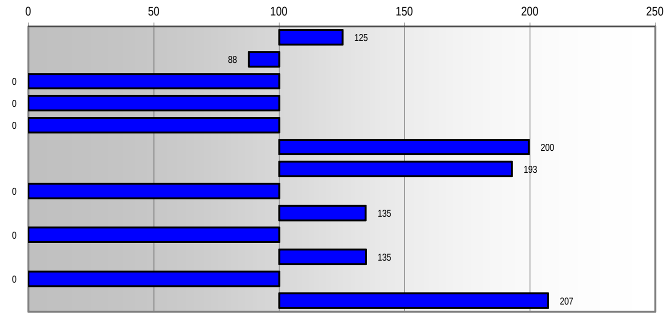
Sector	Classification	Outlets	Area %	Base %	Index
Comparison					
	Antique Shops	0	0.00	0.41	0
	Art & Art Dealers	1	0.60	0.63	95
	Booksellers	1	0.60	0.51	117
	Carpets & Flooring	3	1.80	0.56	324
	Catalogue Showrooms	0	0.00	0.14	0
	Charity Shops	9	5.39	2.54	212
	Chemist & Drugstores	4	2.40	1.14	210
	Childrens & Infants Wear	1	0.60	0.45	133
	Clothing General	3	1.80	2.09	86
	Crafts, Gifts, China & Glass	4	2.40	1.56	154
	Cycles & Accessories	0	0.00	0.25	0
	Department & Variety Stores	1	0.60	0.37	162
	DIY & Home Improvement	3	1.80	0.69	259
	Electrical & Other Durable Goods	3	1.80	1.44	125
	Florists	2	1.20	0.74	163
	Footwear	2	1.20	1.15	104
	Furniture Fitted	2	1.20	0.38	313
	Furniture General	2	1.20	0.92	130
	Gardens & Equipment	0	0.00	0.05	0
	Greeting Cards	2	1.20	0.75	160
	Hardware & Household Goods	3	1.80	1.50	120
	Jewellery, Watches & Silver	2	1.20	1.73	69
	Ladies & Mens Wear & Acc.	0	0.00	1.21	0
	Ladies Wear & Accessories	3	1.80	2.78	65
	Leather & Travel Goods	0	0.00	0.18	0
	Mens Wear & Accessories	1	0.60	0.88	68
	Music & Musical Instruments	0	0.00	0.15	0
	Music & Video Recordings	0	0.00	0.21	0
	Newsagents & Stationers	2	1.20	1.34	89
	Office Supplies	0	0.00	0.03	0
	Other Comparison Goods	2	1.20	0.81	148
	Photographic & Optical	1	0.60	0.13	461
	Secondhand Goods, Books, etc.	0	0.00	0.30	0
	Sports, Camping & Leisure Goods	0	0.00	0.77	0
	Telephones & Accessories	0	0.00	1.26	0
	Textiles & Soft Furnishings	3	1.80	0.67	270
	Toiletries, Cosmetics & Beauty Products	2	1.20	0.92	129
	Toys, Games & Hobbies	2	1.20	0.80	150
	Vehicle & Motorcycle Sales	0	0.00	0.28	0
	Vehicle Accessories	1	0.60	0.20	300
	Totals	**65**	**38.92**	**32.90**	**118**



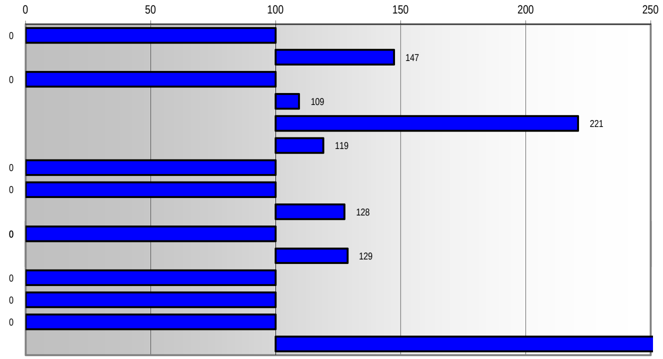
Outlet Counts

Centre: Kenilworth **Survey Date:** 09/01/2012

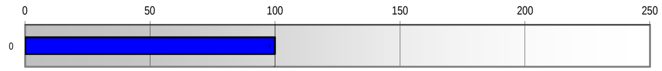
Convenience	Outlets	Area %	Base %	Index
Bakers & Confectioners	4	2.40	1.91	125
Butchers	1	0.60	0.68	88
CTN	0	0.00	0.23	0
Convenience Stores	0	0.00	1.34	0
Fishmongers	0	0.00	0.12	0
Frozen Foods	1	0.60	0.30	200
Greengrocers	1	0.60	0.31	193
Grocers & Delicatessens	0	0.00	0.97	0
Health Foods	1	0.60	0.45	135
Markets	0	0.00	0.12	0
Off Licences	1	0.60	0.44	135
Shoe Repairs Etc	0	0.00	0.44	0
Supermarkets	3	1.80	0.87	207
Total Convenience	**12**	**7.19**	**8.17**	88



Retail Service	Outlets	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.08	0
Dry Cleaners & Launderettes	2	1.20	0.81	147
Filling Stations	0	0.00	0.22	0
Health & Beauty	15	8.98	8.21	109
Opticians	5	2.99	1.36	221
Other Retail Services	1	0.60	0.50	119
Photo Processing	0	0.00	0.15	0
Photo Studio	0	0.00	0.17	0
Post Offices	1	0.60	0.47	128
Repairs, Alterations & Restoration	0	0.00	0.22	0
Travel Agents	2	1.20	0.93	129
TV, Cable & Video Rental	0	0.00	0.03	0
Vehicle Rental	0	0.00	0.06	0
Vehicle Repairs & Services	0	0.00	0.51	0
Video Tape Rental	1	0.60	0.14	417
Totals	**27**	**16.17**	**13.87**	**117**



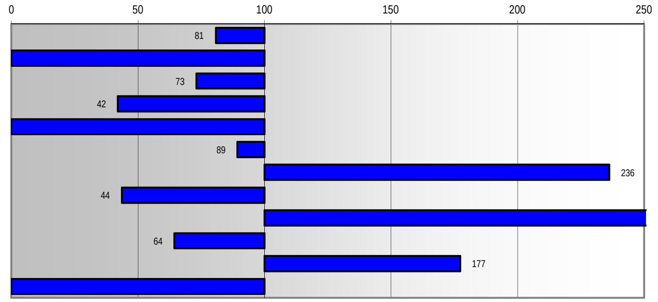
Other Retail	Outlets	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.16**	**0**

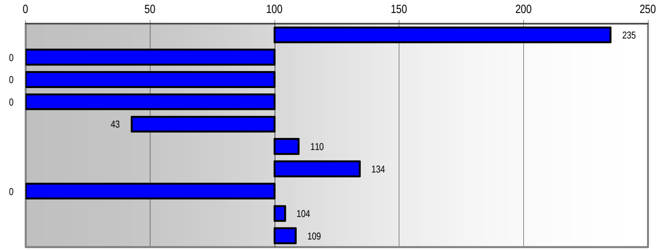


Outlet Counts

Centre: **Kenilworth** **Survey Date:** **09/01/2012**

Leisure Services	Outlets	Area %	Base %	Index
Bars & Wine Bars	2	1.20	1.48	81
Bingo & Amusements	0	0.00	0.43	0
Cafes	5	2.99	4.09	73
Casinos & Betting Offices	1	0.60	1.42	42
Cinemas, Theatres & Concert Halls	0	0.00	0.25	0
Clubs	1	0.60	0.67	89
Disco, Dance & Nightclubs	1	0.60	0.25	236
Fast Food & Take Away	4	2.40	5.49	44
Hotels & Guest Houses	4	2.40	0.64	371
Public Houses	3	1.80	2.79	64
Restaurants	13	7.78	4.39	177
Sports & Leisure Facilities	0	0.00	0.27	0
Totals	**34**	**20.36**	**22.20**	**92**
Financial & Business Services				
Building Societies	2	1.20	0.51	235
Building Supplies & Services	0	0.00	0.51	0
Business Goods & Services	0	0.00	0.03	0
Employment & Careers	0	0.00	0.44	0
Financial Services	1	0.60	1.40	43
Legal Services	2	1.20	1.09	110
Other Business Services	1	0.60	0.45	134
Printing & Copying	0	0.00	0.33	0
Property Services	6	3.59	3.45	104
Retail Banks	5	2.99	2.76	109
Totals	**17**	**10.18**	**10.97**	**93**
Vacant Outlets				
Vacant Retail & Service Outlets	**12**	**7.19**	**11.57**	**62**
Total Number of Outlets	**167**			

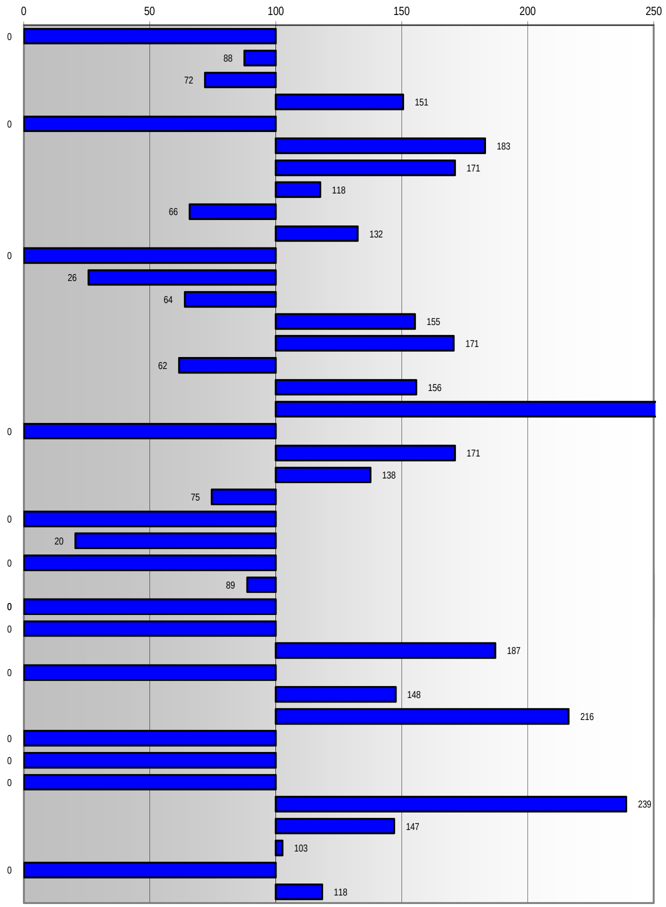




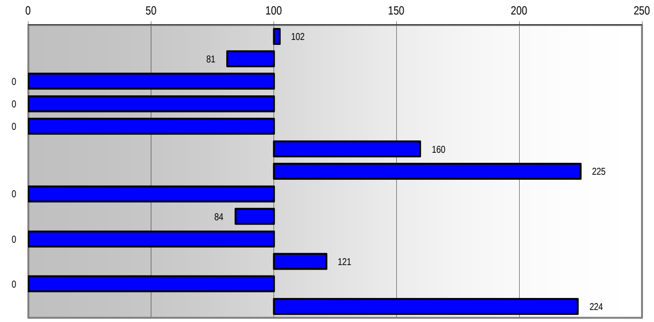
Floorspace Sq Ft

Centre: Kenilworth **Survey Date:** 09/01/2012

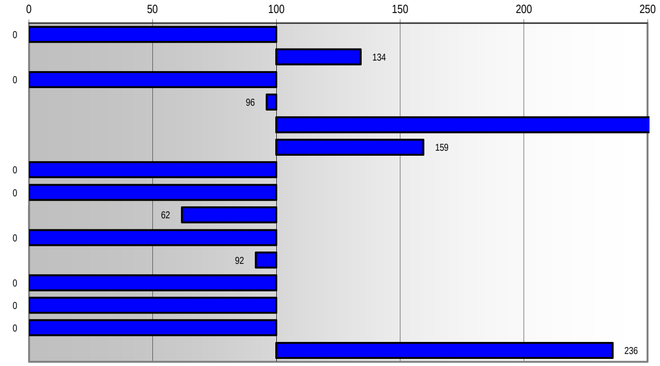
Sector	Classification	Floorspace	Area %	Base %	Index
Comparison					
	Antique Shops	0	0.00	0.22	0
	Art & Art Dealers	1,000	0.31	0.35	88
	Booksellers	1,000	0.31	0.43	72
	Carpets & Flooring	2,700	0.83	0.55	151
	Catalogue Showrooms	0	0.00	0.52	0
	Charity Shops	9,700	2.98	1.63	183
	Chemist & Drugstores	8,700	2.67	1.56	171
	Childrens & Infants Wear	1,400	0.43	0.37	118
	Clothing General	7,400	2.27	3.45	66
	Crafts, Gifts, China & Glass	3,400	1.04	0.79	132
	Cycles & Accessories	0	0.00	0.19	0
	Department & Variety Stores	3,800	1.17	4.54	26
	DIY & Home Improvement	2,400	0.74	1.15	64
	Electrical & Other Durable Goods	6,100	1.87	1.21	155
	Florists	1,500	0.46	0.27	171
	Footwear	1,900	0.58	0.95	62
	Furniture Fitted	1,800	0.55	0.35	156
	Furniture General	13,700	4.20	1.48	285
	Gardens & Equipment	0	0.00	0.07	0
	Greeting Cards	2,800	0.86	0.50	171
	Hardware & Household Goods	15,700	4.82	3.50	138
	Jewellery, Watches & Silver	1,800	0.55	0.74	75
	Ladies & Mens Wear & Acc.	0	0.00	1.67	0
	Ladies Wear & Accessories	1,700	0.52	2.55	20
	Leather & Travel Goods	0	0.00	0.10	0
	Mens Wear & Accessories	2,100	0.64	0.73	89
	Music & Musical Instruments	0	0.00	0.10	0
	Music & Video Recordings	0	0.00	0.22	0
	Newsagents & Stationers	5,900	1.81	0.97	187
	Office Supplies	0	0.00	0.07	0
	Other Comparison Goods	2,900	0.89	0.60	148
	Photographic & Optical	400	0.12	0.06	216
	Secondhand Goods, Books, etc.	0	0.00	0.15	0
	Sports, Camping & Leisure Goods	0	0.00	0.99	0
	Telephones & Accessories	0	0.00	0.67	0
	Textiles & Soft Furnishings	3,800	1.17	0.49	239
	Toiletries, Cosmetics & Beauty Products	4,200	1.29	0.88	147
	Toys, Games & Hobbies	2,200	0.68	0.66	103
	Vehicle & Motorcycle Sales	0	0.00	0.55	0
	Vehicle Accessories	900	0.28	0.23	118
	Totals	**110,900**	**34.03**	**36.47**	**93**



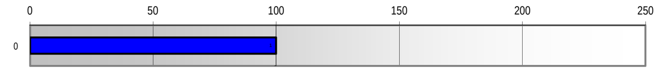
Convenience	Floorspace	Area %	Base %	Index
Bakers & Confectioners	3,000	0.92	0.90	102
Butchers	900	0.28	0.34	81
CTN	0	0.00	0.12	0
Convenience Stores	0	0.00	1.37	0
Fishmongers	0	0.00	0.05	0
Frozen Foods	4,200	1.29	0.81	160
Greengrocers	1,100	0.34	0.15	225
Grocers & Delicatessens	0	0.00	0.52	0
Health Foods	700	0.21	0.25	84
Markets	0	0.00	0.90	0
Off Licences	1,000	0.31	0.25	121
Shoe Repairs Etc	0	0.00	0.12	0
Supermarkets	64,900	19.91	8.90	224
Total Convenience	**75,800**	**23.26**	**14.68**	**158**



Retail Service	Floorspace	Area %	Base %	Index
Clothing & Fancy Dress Hire	0	0.00	0.04	0
Dry Cleaners & Launderettes	1,500	0.46	0.34	134
Filling Stations	0	0.00	0.12	0
Health & Beauty	11,500	3.53	3.67	96
Opticians	7,100	2.18	0.78	278
Other Retail Services	1,800	0.55	0.35	159
Photo Processing	0	0.00	0.05	0
Photo Studio	0	0.00	0.07	0
Post Offices	1,000	0.31	0.50	62
Repairs, Alterations & Restoration	0	0.00	0.07	0
Travel Agents	1,500	0.46	0.50	92
TV, Cable & Video Rental	0	0.00	0.00	0
Vehicle Rental	0	0.00	0.05	0
Vehicle Repairs & Services	0	0.00	0.66	0
Video Tape Rental	1,000	0.31	0.13	236
Totals	**25,400**	**7.79**	**7.36**	**106**



Other Retail	Floorspace	Area %	Base %	Index
Other Retail Outlets	**0**	**0.00**	**0.12**	**0**



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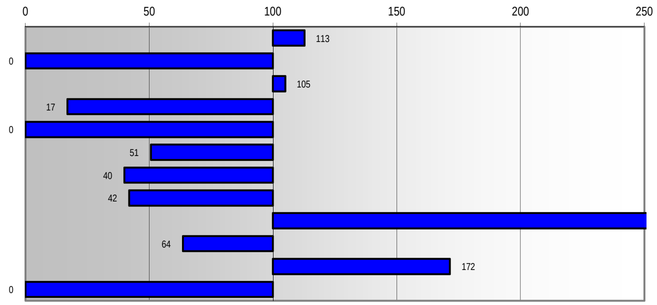
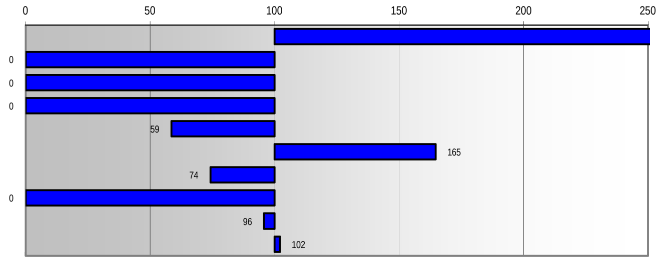
Leisure Services	Floorspace	Area %	Base %	Index
Bars & Wine Bars	6,800	2.09	1.85	113
Bingo & Amusements	0	0.00	0.92	0
Cafes	7,300	2.24	2.13	105
Casinos & Betting Offices	600	0.18	1.09	17
Cinemas, Theatres & Concert Halls	0	0.00	1.68	0
Clubs	1,900	0.58	1.15	51
Disco, Dance & Nightclubs	700	0.21	0.54	40
Fast Food & Take Away	3,600	1.10	2.64	42
Hotels & Guest Houses	22,200	6.81	1.95	350
Public Houses	7,700	2.36	3.71	64
Restaurants	21,400	6.57	3.83	172
Sports & Leisure Facilities	0	0.00	1.62	0
Totals	**72,200**	**22.15**	**23.11**	**96**



Financial & Business Services	Floorspace	Area %	Base %	Index
Building Societies	3,500	1.07	0.39	274
Building Supplies & Services	0	0.00	0.47	0
Business Goods & Services	0	0.00	0.01	0
Employment & Careers	0	0.00	0.28	0
Financial Services	1,500	0.46	0.79	59
Legal Services	4,200	1.29	0.78	165
Other Business Services	1,100	0.34	0.45	74
Printing & Copying	0	0.00	0.19	0
Property Services	5,600	1.72	1.79	96
Retail Banks	10,400	3.19	3.12	102
Totals	**26,300**	**8.07**	**8.29**	**97**



Vacant Outlets				
Vacant Retail & Service Outlets	**15,300**	**4.69**	**9.36**	**50**
Total Floorspace	**325,900**			

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TERMS AND CONDITIONS

1. DEFINITIONS
"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.
"Experian" means Experian Group Limited.
"the Client" means the person, firm or limited company to whom the Services are to be provided.
"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.
"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.
"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS
Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES
3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.
3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.
3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.
3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES
4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.
4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.
4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY
Notwithstanding anything to the contrary contained in this Agreement:
5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.
5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT
Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY
7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.
7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.
7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)
7.3.1 the Information; and/or
7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or
7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.
7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:
7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction
7.4.2 it has already come within the public domain
7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY
The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984
The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION
10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:
10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE
Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT
The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER
Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS
This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE
Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.
15.1 if given by mail seventy-two hours after the same shall have been despatched and
15.2 if given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE
This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW
This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

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THE POWER BEHIND THE ANSWERS

WWW.RMG-CLARITY.CO.UK

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TABLE OF CONTENTS

BACKGROUND & METHODOLOGY

A telephone survey was conducted within the Warwick catchment area, as well as the surrounding areas. The survey covered a range of aspects relating to shopping habits and in particular sought to establish the following:

- Closest main town centre to the respondent's home location

Main Food Shopping
- In which store respondents do most of their main food shopping
    - If internet, which retailer is used
- Method of travel to their main food store
- Whether respondents combine their main food shopping trip with other activities, and if so with what type of activity
- The store used next most often for main food shopping

Top-Up Food Shopping
- In which store respondents undertake most of their top-up food shopping
- Of all the money respondents spend on their food and household groceries, on average what proportion goes on main food shopping

Non-Food Shopping
- Where respondents go most often for the following non-food items:
    - Clothing & footwear items (women's, men's, children's and baby)
        - Method of travel to its clothing & footwear shopping destination
        - What they like about this shopping destination

    - Small domestic electrical appliances (such as irons, kettles, fans, coffee makers, food mixers etc)
    - Recording media for pictures and sound (e.g. records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc) (excludes video games)
    - Audio visual, photographic, computer items (such as stereos, radios, TVs, software, cameras, telephones, etc)
    - Games & toys; hobby items; sport and camping goods; and musical instruments
    - Pets & pet related products
    - Books (incl. dictionaries, encyclopaedias, text books, guidebooks and musical scores) and stationary (incl. writing pads, envelopes pens, diaries, etc) and drawing materials
    - Personal/ luxury goods including jewellery, china, glass, medicine and cosmetics
    - Furniture, carpets, other floor coverings and household textiles (includes beds, sofas, tables, etc)
    - DIY goods, decorating supplies and garden products (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc)
    - Large domestic appliances such as washing machines, fridges, cookers, etc

Visiting Other Locations
- Frequency of visiting Leamington Spa for shopping
- What improvements to Leamington Spa, if any, would make respondents visit it more often
- Frequency of visiting Warwick Town Centre for shopping
- What improvements to Warwick Town Centre, if any, would make respondents visit it more often
- Frequency of visiting Kenilworth for shopping
- What improvements to Kenilworth, if any, would make respondents visit it more often

Leisure Activities
- Whether respondents or members of the household undertake the following leisure activities and, if so, how often and where:
    - Bingo/ Casino
    - Cinema
    - Gym/ Healthclub/ Sports Facility
    - Museum/ gallery or place of historical/ cultural interest/ theatre
    - Pub/ Bar/ nightclub/ music venue

- Restaurant
- Tenpin bowling
- Other leisure activity

Demographics

- Age group of respondent
- Occupation/ SEG of chief wage earner
- Number of people in the household
- Number of cars in the household
- Quality control
- Gender of respondent

A total of 1,000 interviews were carried out within the Warwick catchment area, as well as the surrounding areas between 2nd and 8th July 2013. Interviews were conducted at RMG:Clarity's in-house CATI (Computer Assisted Telephone Interviewing) Unit. Respondents were contacted during the day, in the evening and at the weekend.

SAMPLE BREAKDOWN

Zone	Postcode Sectors	Population (2011 Census)	%	Sample Proportion	Sample Adjusted	Weighting
1	CV32 4	3,149	1.05%	109.33	109	1.00
	CV32 5	8,230	2.75%			
	CV32 6	7,490	2.50%			
	CV32 7	13,827	4.62%			
2	CV34 4	4,831	1.62%	104.81	105	1.00
	CV34 5	14,218	4.75%			
	CV34 6	12,296	4.11%			
3	CV31 1	12,171	4.07%	105.43	106	0.99
	CV31 2	12,287	4.11%			
	CV31 3	7,072	2.36%			
4	CV33 9	6,103	2.04%	93.40	93	1.00
	CV47 0	2,213	0.74%			
	CV47 1	4,354	1.46%			
	CV47 2	5,145	1.72%			
	CV47 8	2,491	0.83%			
	CV47 9	2,013	0.67%			
	CV23 8	5,613	1.88%			
5	CV8 3	6,771	2.26%	85.29	85	1.00
	CV23 9	6,611	2.21%			
	CV3 3	7,874	2.63%			
	CV3 4	4,249	1.42%			
6	CV3 5	13,479	4.51%	143.30	143	1.00
	CV3 6	12,484	4.17%			
	CV4 7	8,878	2.97%			
	CV4 8	8,015	2.68%			
7	CV8 1	11,021	3.69%	81.12	81	1.00
	CV8 2	13,239	4.43%			
8	B95 5	3,908	1.31%	93.12	93	1.00
	CV35 7	5,310	1.78%			
	B93 0	3,467	1.16%			
	B93 8	7,783	2.60%			
	B94 5	3,870	1.29%			
	B94 6	3,510	1.17%			
9	B95 6	1,755	0.59%	109.69	110	1.00
	CV35 8	5,676	1.90%			
	CV37 0	6,733	2.25%			
	CV37 6	6,679	2.23%			
	CV37 9	11,959	4.00%			
10	CV35 0	5,786	1.93%	74.50	75	1.01
	CV35 9	7,837	2.62%			
	CV37 7	8,658	2.90%			
	Total	**299,055**	**100%**	**1000**	**1000**	

The sample used for making telephone calls was obtained from an external supplier, who supplied telephone numbers by postcode from their database. The telephone numbers were then sorted into the relevant postcode sectors and zones for interviewing.

Tabulations were provided that were weighted by zone population in order to ensure that the results were broadly representative of main food shoppers in the survey area.

STATEMENT OF RELIABILITY

Assessment of the standard error:

1. This survey has been undertaken by a series of individual sample surveys for different postcode sectors.

2. The results are subject to the following sampling error, for which there follows an analysis.

3. The following analysis indicates the methodology used to calculate the standard error, with the standard 95% probability of being correct. The formulae for these calculations are as follows:

$$SE\% = \sqrt{\frac{p\%xq\%}{n}}$$

where p% = % sample value recorded
q% = 100% - p%
n = sample size

and where:
±3.09 (SE%) = 95% probability that the correct answer lies in the range calculated.

4. When the sampling frame for individual zones is boosted to ensure reliability, with the results subsequently weighted proportional to population, the following analysis is used to calculate the effective sample size. The formulae for these calculations are as follows:

$$\frac{n}{\sum_{i=1}^{k} P_i W_i^{\,2}}$$

where k = number of zones the population and sample are divided into
n = total sample size
P = sample proportions
W = weights

5. On our sample of 1,000 interviews we have a confidence interval of 3.09 at a 95% confidence level.

The **confidence interval** is the plus-or-minus figure usually reported in newspaper or television opinion poll results. For example, if you use a confidence interval of 3.09 and 50% percent of your sample picks an answer you can be "sure" that if you had asked the question of the entire relevant population between 46.91% **(50 – 3.09)** and 53.09% **(50 + 3.09)** would have picked that answer.

The **confidence level** tells you how sure you can be. It is expressed as a percentage and represents how often the true percentage of the population who would pick an answer lies within the confidence interval. The 95% confidence level means you can be 95% certain; the 99% confidence level means you can be 99% certain. Most researchers use the 95% confidence level.

When you put the confidence level and the confidence interval together, you can say that you are 95% sure that the true percentage of the population is between **46.91%** and **53.09%**.

APPENDIX ONE – HOUSEHOLD SURVEY QUESTIONNAIRE

J11385 Warwick Household Survey - Final Questionnaire - 02-07-13

Telephone Introduction:

Good morning/ afternoon/ evening. My name is AgentName and I am calling from an independent research agency RMG:Clarity.

We're simply conducting a short survey in your area about shopping and leisure activities on behalf of Warwick District Council.

It should only take around 10 minutes to complete the interview and all of your answers will be treated with the strictest confidence. Would you be kind enough to spare some time please?

IF YES: "JUST TO INFORM YOU THAT THIS CALL IS BEING RECORDED FOR TRAINING AND QUALITY PURPOSES"

F1. Are you the person responsible or jointly responsible for main food shopping in your household?

DO NOT READ OUT. MARK ONE BOX ONLY.

- ❑ 1 Yes
- ❑ 2 No

If = 2, Prompt interviewee with message 'If not ask for person who is. If not available please thank respondent and close interview'

F2. Can I please confirm your postcode is S_Postcode?

IF INCORRECT, TYPE CORRECT POSTCODE UNDER 'OTHER' BELOW

- ❑ 1 Postcode is correct
- ❑ 2 Other (specify) ____

Q1. Can I ask which of the following is the closest main TOWN CENTRE to where you live (i.e. not local villages, etc.)?

READ OUT. MARK ONE BOX ONLY.

IF NOT ON LIST, TYPE UNDER 'OTHER' BELOW - BUT NOT SMALL LOCAL VILLAGES.

DO NOT TYPE IN INTERNET.

- ❑ 1 Alcester
- ❑ 2 Banbury
- ❑ 3 Birmingham - Acocks Green
- ❑ 4 Birmingham - Hall Green
- ❑ 5 Birmingham - Moseley
- ❑ 6 Birmingham - Sparkhill
- ❑ 7 Birmingham - Stirchley
- ❑ 8 Coventry
- ❑ 9 Daventry
- ❑ 10 Kenilworth
- ❑ 11 Knowle
- ❑ 12 Leamington Spa
- ❑ 13 Milton Keynes
- ❑ 14 Northampton
- ❑ 15 Nuneaton
- ❑ 16 Redditch
- ❑ 17 Rugby
- ❑ 18 Shirley
- ❑ 19 Solihull
- ❑ 20 Stratford-upon-Avon
- ❑ 21 Warwick
- ❑ 22 Welltham
- ❑ 23 Other (specify) ____

I'd now like to ask you a few questions about your food shopping:

Q2. In which store do you normally shop at for all your household's main food and grocery shopping needs (i.e. primarily bulk 'trolley' purchases)?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: INCLUDE STORE'S FULL NAME (E.G. TESCO EXTRA, TESCO EXPRESS, ETC) AND FULL ADDRESS E.G. ROAD NAME AND TOWN.

IF RESPONDENT USES THE INTERNET. PLEASE RECORD THE NAME OF THE RETAILER ON THE NEXT QUESTION.

- ❑ 1 Aldi, Canners Way, Stratford-upon-Avon
- ❑ 2 Aldi, Central Park, Rugby
- ❑ 3 Aldi, Paddox Close, Rugby
- ❑ 4 Aldi, Radford Road, Coventry
- ❑ 5 Aldi, Sheaf Street, Daventry
- ❑ 6 Aldi, Stratford Road, Shirley
- ❑ 7 Asda, Abbey Park, Coventry
- ❑ 8 Asda, Chapel Street, Rugby
- ❑ 9 Asda, Chesterton Drive, Leamington Spa
- ❑ 10 Asda, Jubilee Crescent, Coventry
- ❑ 11 Asda, Walsgrave Retail Park, Coventry
- ❑ 12 Budgens, Wordsworth Avenue, Stratford-on-Avon
- ❑ 13 Co-op 34-56 Clemens Street, Leamington Spa
- ❑ 14 Co-op, Coventry Sreet, Southam
- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, Henley Street, Stratford-upon-Avon
- ❑ 17 Co-op, High Street, Leamington Spa
- ❑ 18 Co-op, Loxley Close, Wellesbourne
- ❑ 19 Co-op, Townsend Lane, Rugby
- ❑ 20 Hillers Farm Shop, Alcester
- ❑ 21 Hunningham House Farm, Hunningham, Lemington Spa
- ❑ 22 Iceland, 2 Warwick Road, Kenilworth
- ❑ 23 Iceland, 56 Bath Street, Leamington Spa
- ❑ 24 Iceland, Binley Road, Coventry
- ❑ 25 Iceland, Cannon Park, Coventry
- ❑ 26 Iceland, Queen Victoria Street, Coventry
- ❑ 27 Iceland, The Clock Towers Shopping Centre, Rugby
- ❑ 28 Lidl, Bilton Road, Rugby
- ❑ 29 Lidl, Myton Road, Leamington Spa
- ❑ 30 Local stores, Claverdon
- ❑ 31 Local stores, Coventry
- ❑ 32 Local stores, Cubbington
- ❑ 33 Local stores, Dorridge
- ❑ 34 Local stores, Henley-in-Arden
- ❑ 35 Local stores, Kenilworth
- ❑ 36 Local stores, Leamington Spa
- ❑ 37 Local stores, Solihull
- ❑ 38 Local stores, Southam
- ❑ 39 Local stores, Warwick
- ❑ 40 Local stores, Weston-under-Wetherley
- ❑ 41 Londis, Newland Road, Leamington Spa
- ❑ 42 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 43 Marks & Spencer, Bridge Street, Stratford-upon-Avon
- ❑ 44 Marks & Spencer, Mill Lane, Solihull
- ❑ 45 Marks & Spencer, Upper Precinct, Coventry
- ❑ 46 Morrisons, Alcester Road, Stratford upon Avon
- ❑ 47 Morrisons, Alvis Retail Park, Holyhead Road, Coventry
- ❑ 48 Morrisons, Binley, Coventry
- ❑ 49 Morrisons, Clearwell Road, Redditch
- ❑ 50 Morrisons, George Road, Solihull
- ❑ 51 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 52 Morrisons, Parkgate Road, Coventry
- ❑ 53 Morrisons, Stratford Road, Shirley
- ❑ 54 Netto, Jubilee Crescent, Radford

- ❑ 55 Sainsbury's, 2 Park Street, Warwick
- ❑ 56 Sainsbury's, Abbey Retail Park, Redditch
- ❑ 57 Sainsbury's, Austin Drive, Coventry
- ❑ 58 Sainsbury's, Bridge Street, Stratford-upon-Avon
- ❑ 59 Sainsbury's, Clifton Road, Rugby
- ❑ 60 Sainsbury's, Coton End, Warwick
- ❑ 61 Sainsbury's, Dunchurch Road, Rugby
- ❑ 62 Sainsbury's, Fletchhamstead Highway, Coventry
- ❑ 63 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 64 Sainsbury's, Poplar Way, Solihull
- ❑ 65 Sainsbury's, Saltisford, Warwick
- ❑ 66 Sainsbury's, Stratford Road, Shirley, Solihull
- ❑ 67 Sainsbury's, The Saltisford, Warwick
- ❑ 68 Sainsbury's, Trinity Street, Coventry
- ❑ 69 Sainsbury's, Warwick Road, Kenilworth
- ❑ 70 Tesco Express, Ashby Fields Local Centre, Daventry
- ❑ 71 Tesco Express, Sheldon Square, Coventry
- ❑ 72 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 73 Tesco Express, Walsgrave Road, Coventry
- ❑ 74 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 75 Tesco, Arena Park, Phoenix Way, Coventry
- ❑ 76 Tesco, Birmingham Road, Stratford-upon-Avon
- ❑ 77 Tesco, Cannon Park Centre, Lynchgate Road, Coventry
- ❑ 78 Tesco, Clifford Bridge Road, Walsgrave, Coventry
- ❑ 79 Tesco, Emscote Road, Warwick
- ❑ 80 Tesco, Jubilee Cross, Lychgate Road, Coventry
- ❑ 81 Tesco, Leicester Road, Rugby
- ❑ 82 Tesco, Monkspath Business Park, Solihull
- ❑ 83 Tesco, Newstreet, Daventry
- ❑ 84 Tesco, Shakespeare Centre, Redditch
- ❑ 85 Tesco, St. Johns Way, Knowle, Solihull
- ❑ 86 Tesco, Stratford Road, Solihull
- ❑ 87 Tesco, Warwick Road, Solihull
- ❑ 88 Waitrose, Bertie Road, Kenilworth
- ❑ 89 Waitrose, Bowen Square, Daventry
- ❑ 90 Waitrose, Stratford Road, Hall Green, Birmingham
- ❑ 91 Internet (specify retailer on next question)
- ❑ 92 Other (specify) ______

If <> 91, do not ask 'Q2a'
If = 91, do not ask 'Q3'
If = 91, do not ask 'Q4'

Q2a. Which internet retailer do you use?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF NOT ON LIST, SPECIFY UNDER OTHER BELOW.

- ❑ 1 Asda
- ❑ 2 Tesco
- ❑ 3 Sainsbury's
- ❑ 4 Other (specify) ______

Q3. How do you normally travel to Q2?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF CAR/ VAN, PLEASE PROBE AS TO WHETHER THEY ARE THE DRIVER OR PASSENGER.

- ❑ 1 Car / van (as driver)
- ❑ 2 Car / van (as passenger)
- ❑ 3 Bicycle
- ❑ 4 Bus, minibus or coach
- ❑ 5 Goods delivered
- ❑ 6 Mobility scooter
- ❑ 7 Motorcycle, scooter or moped
- ❑ 8 Taxi
- ❑ 9 Train
- ❑ 10 Using park & ride facility
- ❑ 11 Walk
- ❑ 12 Other (specify) ____________

Q4. When you visit Q2 for your main food shopping, do you combine your shopping with other activities (for example non-food shopping, leisure / entertainment, visiting restaurants, bars, banks, etc.)? If so, what activities?

DO NOT READ OUT. MARK ALL THAT APPLY.

IF NOT ON LIST, TYPE UNDER 'OTHER' BELOW.

(22 maximum responses)

- ❑ 1 Yes - non-food shopping
- ❑ 2 Yes - other food shopping
- ❑ 3 Yes - bars/pubs
- ❑ 4 Yes - bingo
- ❑ 5 Yes - cafes
- ❑ 6 Yes - cinemas
- ❑ 7 Yes - get petrol
- ❑ 8 Yes - go to park
- ❑ 9 Yes - gyms/ health and fitness
- ❑ 10 Yes - library
- ❑ 11 Yes - markets
- ❑ 12 Yes - meeting family
- ❑ 13 Yes - meeting friends
- ❑ 14 Yes - museums/ art gallery
- ❑ 15 Yes - other service (travel agent, estate agent)
- ❑ 16 Yes - personal service (hairdressers, beauty salon)
- ❑ 17 Yes - restaurants
- ❑ 18 Yes - swimming
- ❑ 19 Yes - theatre
- ❑ 20 Yes - visiting services such as banks and other financial institutions
- ❑ 21 Yes - work
- ❑ 22 No
- ❑ 23 Other (specify) ____________

Q5. In addition to Q2, are there any other stores that you regularly use for your main-food shopping?

DO NOT READ OUT. MARK ALL THAT APPLY.

INTERVIEWER NOTE: INCLUDE STORE'S FULL NAME (E.G. TESCO EXTRA, TESCO EXPRESS, ETC) AND FULL ADDRESS E.G. ROAD NAME AND TOWN.

IF RESPONDENT USES THE INTERNET. PLEASE RECORD THE NAME OF THE RETAILER UNDER OTHER BELOW.

(92 maximum responses)

❑ 1 Aldi, Canners Way, Stratford-upon-Avon
❑ 2 Aldi, Central Park, Rugby
❑ 3 Aldi, Paddox Close, Rugby
❑ 4 Aldi, Radford Road, Coventry
❑ 5 Aldi, Sheaf Street, Daventry
❑ 6 Aldi, Stratford Road, Shirley
❑ 7 Asda, Abbey Park, Coventry
❑ 8 Asda, Chapel Street, Rugby
❑ 9 Asda, Chesterton Drive, Leamington Spa
❑ 10 Asda, Jubilee Crescent, Coventry
❑ 11 Asda, Walsgrave Retail Park, Coventry
❑ 12 Budgens, Wordsworth Avenue, Stratford-on-Avon
❑ 13 Co-op 34-56 Clemens Street, Leamington Spa
❑ 14 Co-op, Coventry Sreet, Southam
❑ 15 Co-op, Cressida Drive, Warwick
❑ 16 Co-op, Henley Street, Stratford-upon-Avon
❑ 17 Co-op, High Street, Leamington Spa
❑ 18 Co-op, Loxley Close, Wellesbourne
❑ 19 Co-op, Townsend Lane, Rugby
❑ 20 Hillers Farm Shop, Alcester
❑ 21 Hunningham House Farm, Hunningham, Lemington Spa
❑ 22 Iceland, 2 Warwick Road, Kenilworth
❑ 23 Iceland, 56 Bath Street, Leamington Spa
❑ 24 Iceland, Binley Road, Coventry
❑ 25 Iceland, Cannon Park, Coventry
❑ 26 Iceland, Queen Victoria Street, Coventry
❑ 27 Iceland, The Clock Towers Shopping Centre, Rugby
❑ 28 Lidl, Bilton Road, Rugby
❑ 29 Lidl, Myton Road, Leamington Spa
❑ 30 Local stores, Claverdon
❑ 31 Local stores, Coventry
❑ 32 Local stores, Cubbington
❑ 33 Local stores, Dorridge
❑ 34 Local stores, Henley-in-Arden
❑ 35 Local stores, Kenilworth
❑ 36 Local stores, Leamington Spa
❑ 37 Local stores, Solihull
❑ 38 Local stores, Southam
❑ 39 Local stores, Warwick
❑ 40 Local stores, Weston-under-Wetherley
❑ 41 Londis, Newland Road, Leamington Spa
❑ 42 Marks & Spencer, 70 Parade, Leamington Spa
❑ 43 Marks & Spencer, Bridge Street, Stratford-upon-Avon
❑ 44 Marks & Spencer, Mill Lane, Solihull
❑ 45 Marks & Spencer, Upper Precinct, Coventry
❑ 46 Morrisons, Alcester Road, Stratford upon Avon
❑ 47 Morrisons, Alvis Retail Park, Holyhead Road, Coventry
❑ 48 Morrisons, Binley, Coventry
❑ 49 Morrisons, Clearwell Road, Redditch
❑ 50 Morrisons, George Road, Solihull
❑ 51 Morrisons, Old Warwick Road, Leamington Spa
❑ 52 Morrisons, Parkgate Road, Coventry
❑ 53 Morrisons, Stratford Road, Shirley
❑ 54 Netto, Jubilee Crescent, Radford

- ❑ 55 Sainsbury's, 2 Park Street, Warwick
- ❑ 56 Sainsbury's, Abbey Retail Park, Redditch
- ❑ 57 Sainsbury's, Austin Drive, Coventry
- ❑ 58 Sainsbury's, Bridge Street, Stratford-upon-Avon
- ❑ 59 Sainsbury's, Clifton Road, Rugby
- ❑ 60 Sainsbury's, Coton End, Warwick
- ❑ 61 Sainsbury's, Dunchurch Road, Rugby
- ❑ 62 Sainsbury's, Fletchhamstead Highway, Coventry
- ❑ 63 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 64 Sainsbury's, Poplar Way, Solihull
- ❑ 65 Sainsbury's, Saltisford, Warwick
- ❑ 66 Sainsbury's, Stratford Road, Shirley, Solihull
- ❑ 67 Sainsbury's, The Saltisford, Warwick
- ❑ 68 Sainsbury's, Trinity Street, Coventry
- ❑ 69 Sainsbury's, Warwick Road, Kenilworth
- ❑ 70 Tesco Express, Ashby Fields Local Centre, Daventry
- ❑ 71 Tesco Express, Sheldon Square, Coventry
- ❑ 72 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 73 Tesco Express, Walsgrave Road, Coventry
- ❑ 74 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 75 Tesco, Arena Park, Phoenix Way, Coventry
- ❑ 76 Tesco, Birmingham Road, Stratford-upon-Avon
- ❑ 77 Tesco, Cannon Park Centre, Lynchgate Road, Coventry
- ❑ 78 Tesco, Clifford Bridge Road, Walsgrave, Coventry
- ❑ 79 Tesco, Emscote Road, Warwick
- ❑ 80 Tesco, Jubilee Cross, Lychgate Road, Coventry
- ❑ 81 Tesco, Leicester Road, Rugby
- ❑ 82 Tesco, Monkspath Business Park, Solihull
- ❑ 83 Tesco, Newstreet, Daventry
- ❑ 84 Tesco, Shakespeare Centre, Redditch
- ❑ 85 Tesco, St. Johns Way, Knowle, Solihull
- ❑ 86 Tesco, Stratford Road, Solihull
- ❑ 87 Tesco, Warwick Road, Solihull
- ❑ 88 Waitrose, Bertie Road, Kenilworth
- ❑ 89 Waitrose, Bowen Square, Daventry
- ❑ 90 Waitrose, Stratford Road, Hall Green, Birmingham
- ❑ 91 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 92 No other stores used
- ❑ 93 Other (specify) ____________

If = 91, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other'   E.G. 'Internet - Tesco''

Q6. In addition to your main food shopping, where do you do most of your household's small scale 'top-up' food shopping? (i.e. the store you visit regularly (2+ times a week to buy bread, milk, etc., on a day-to-day basis)

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: INCLUDE STORE'S FULL NAME (E.G. TESCO EXTRA, TESCO EXPRESS, ETC) AND FULL ADDRESS E.G. ROAD NAME AND TOWN.

IF RESPONDENT USES THE INTERNET. PLEASE RECORD THE NAME OF THE RETAILER UNDER OTHER BELOW.

❑ 1 Aldi, Canners Way, Stratford-upon-Avon
❑ 2 Aldi, Central Park, Rugby
❑ 3 Aldi, Paddox Close, Rugby
❑ 4 Aldi, Radford Road, Coventry
❑ 5 Aldi, Sheaf Street, Daventry
❑ 6 Aldi, Stratford Road, Shirley
❑ 7 Asda, Abbey Park, Coventry
❑ 8 Asda, Chapel Street, Rugby
❑ 9 Asda, Chesterton Drive, Leamington Spa
❑ 10 Asda, Jubilee Crescent, Coventry
❑ 11 Asda, Walsgrave Retail Park, Coventry
❑ 12 Budgens, Wordsworth Avenue, Stratford-on-Avon
❑ 13 Co-op 34-56 Clemens Street, Leamington Spa
❑ 14 Co-op, Coventry Sreet, Southam
❑ 15 Co-op, Cressida Drive, Warwick
❑ 16 Co-op, Henley Street, Stratford-upon-Avon
❑ 17 Co-op, High Street, Leamington Spa
❑ 18 Co-op, Loxley Close, Wellesbourne
❑ 19 Co-op, Townsend Lane, Rugby
❑ 20 Hillers Farm Shop, Alcester
❑ 21 Hunningham House Farm, Hunningham, Lemington Spa
❑ 22 Iceland, 2 Warwick Road, Kenilworth
❑ 23 Iceland, 56 Bath Street, Leamington Spa
❑ 24 Iceland, Binley Road, Coventry
❑ 25 Iceland, Cannon Park, Coventry
❑ 26 Iceland, Queen Victoria Street, Coventry
❑ 27 Iceland, The Clock Towers Shopping Centre, Rugby
❑ 28 Lidl, Bilton Road, Rugby
❑ 29 Lidl, Myton Road, Leamington Spa
❑ 30 Local stores, Claverdon
❑ 31 Local stores, Coventry
❑ 32 Local stores, Cubbington
❑ 33 Local stores, Dorridge
❑ 34 Local stores, Henley-in-Arden
❑ 35 Local stores, Kenilworth
❑ 36 Local stores, Leamington Spa
❑ 37 Local stores, Solihull
❑ 38 Local stores, Southam
❑ 39 Local stores, Warwick
❑ 40 Local stores, Weston-under-Wetherley
❑ 41 Londis, Newland Road, Leamington Spa
❑ 42 Marks & Spencer, 70 Parade, Leamington Spa
❑ 43 Marks & Spencer, Bridge Street, Stratford-upon-Avon
❑ 44 Marks & Spencer, Mill Lane, Solihull
❑ 45 Marks & Spencer, Upper Precinct, Coventry
❑ 46 Morrisons, Alcester Road, Stratford upon Avon
❑ 47 Morrisons, Alvis Retail Park, Holyhead Road, Coventry
❑ 48 Morrisons, Binley, Coventry
❑ 49 Morrisons, Clearwell Road, Redditch
❑ 50 Morrisons, George Road, Solihull
❑ 51 Morrisons, Old Warwick Road, Leamington Spa
❑ 52 Morrisons, Parkgate Road, Coventry
❑ 53 Morrisons, Stratford Road, Shirley
❑ 54 Netto, Jubilee Crescent, Radford

- ❑ 55 Sainsbury's, 2 Park Street, Warwick
- ❑ 56 Sainsbury's, Abbey Retail Park, Redditch
- ❑ 57 Sainsbury's, Austin Drive, Coventry
- ❑ 58 Sainsbury's, Bridge Street, Stratford-upon-Avon
- ❑ 59 Sainsbury's, Clifton Road, Rugby
- ❑ 60 Sainsbury's, Coton End, Warwick
- ❑ 61 Sainsbury's, Dunchurch Road, Rugby
- ❑ 62 Sainsbury's, Fletchhamstead Highway, Coventry
- ❑ 63 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 64 Sainsbury's, Poplar Way, Solihull
- ❑ 65 Sainsbury's, Saltisford, Warwick
- ❑ 66 Sainsbury's, Stratford Road, Shirley, Solihull
- ❑ 67 Sainsbury's, The Saltisford, Warwick
- ❑ 68 Sainsbury's, Trinity Street, Coventry
- ❑ 69 Sainsbury's, Warwick Road, Kenilworth
- ❑ 70 Tesco Express, Ashby Fields Local Centre, Daventry
- ❑ 71 Tesco Express, Sheldon Square, Coventry
- ❑ 72 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 73 Tesco Express, Walsgrave Road, Coventry
- ❑ 74 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 75 Tesco, Arena Park, Phoenix Way, Coventry
- ❑ 76 Tesco, Birmingham Road, Stratford-upon-Avon
- ❑ 77 Tesco, Cannon Park Centre, Lynchgate Road, Coventry
- ❑ 78 Tesco, Clifford Bridge Road, Walsgrave, Coventry
- ❑ 79 Tesco, Emscote Road, Warwick
- ❑ 80 Tesco, Jubilee Cross, Lychgate Road, Coventry
- ❑ 81 Tesco, Leicester Road, Rugby
- ❑ 82 Tesco, Monkspath Business Park, Solihull
- ❑ 83 Tesco, Newstreet, Daventry
- ❑ 84 Tesco, Shakespeare Centre, Redditch
- ❑ 85 Tesco, St. Johns Way, Knowle, Solihull
- ❑ 86 Tesco, Stratford Road, Solihull
- ❑ 87 Tesco, Warwick Road, Solihull
- ❑ 88 Waitrose, Bertie Road, Kenilworth
- ❑ 89 Waitrose, Bowen Square, Daventry
- ❑ 90 Waitrose, Stratford Road, Hall Green, Birmingham
- ❑ 91 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 92 Don't do 'top-up' food shopping
- ❑ 93 Other (specify) ______

If = 92, do not ask 'Q7'
If = 91, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other' E.G. 'Internet - Tesco''

Q7. Of all the money you spend on food and household groceries, what share goes to your main food shopping?

PLEASE TYPE IN TO THE NEAREST WHOLE % (PERCENTAGE) E.G. PROBE FOR A QUARTER = 25%, A HALF = 50%, THREE QUARTERS = 75%, ETC

IF DON'T KNOW TYPE IN 888

IF REFUSED TYPE IN 999

(must be between 0 and 999)

I'd now like to ask you a few questions about your non-food shopping habits / preferences:

Q8. In which ONE town centre, freestanding store or retail park do you do most of your household's shopping for (men's, women's, children's and baby) clothing and footwear (fashion items - not sports clothing and footwear)?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER'.

IF VARIES, PROBE FOR A LOCATION PLEASE.

- ❑ 1 Alcester
- ❑ 2 Banbury
- ❑ 3 Birmingham - Acocks Green
- ❑ 4 Birmingham - City Centre
- ❑ 5 Birmingham - Hall Green
- ❑ 6 Birmingham - Sparkhill
- ❑ 7 Birmingham - Stirchley
- ❑ 8 Birmingham Moseley
- ❑ 9 Coventry
- ❑ 10 Daventry
- ❑ 11 Kenilworth
- ❑ 12 Knowle
- ❑ 13 Leamington Shopping Park, Leamington Spa
- ❑ 14 Leamington Spa
- ❑ 15 Milton Keynes
- ❑ 16 Northampton
- ❑ 17 Nuneaton
- ❑ 18 Redditch
- ❑ 19 Rugby
- ❑ 20 Shirley
- ❑ 21 Solihull
- ❑ 22 Stratford-upon-Avon
- ❑ 23 Warwick
- ❑ 24 Warwickshire Retail Park
- ❑ 25 Welltham
- ❑ 26 Catalogue / Mail Order
- ❑ 27 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 28 Don't buy
- ❑ 29 Other (specify) ______

If = 26, 27, 28, do not ask 'Q9'
If = 28, do not ask 'Q10'
If = 27, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other'   E.G. 'Internet - Amazon''

Q9. How does your household normally travel to its main clothing and footwear shopping destination in Q8?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF CAR/ VAN, PLEASE PROBE AS TO WHETHER THEY ARE THE DRIVER OR PASSENGER.

- ❑ 1 Car / van (as driver)
- ❑ 2 Car / van (as passenger)
- ❑ 3 Bicycle
- ❑ 4 Bus, minibus or coach
- ❑ 5 Goods delivered
- ❑ 6 Mobility scooter
- ❑ 7 Motorcycle, scooter or moped
- ❑ 8 Taxi
- ❑ 9 Train
- ❑ 10 Using park & ride facility
- ❑ 11 Walk
- ❑ 12 Other (specify) ______

Q10. What do you like about Q8?

DO NOT READ OUT. MARK ALL THAT APPLY.

IF RESPONDENT STATES A PARTICULAR STORE PLEASE TYPE IN THE RETAILER NAME IN THE 'PARTICULAR STORE' OTHER BOX

(28 maximum responses)

- ❑ 1 Attractive environment
- ❑ 2 Cinema
- ❑ 3 Cleanliness
- ❑ 4 Close to friends/ family
- ❑ 5 Close to home
- ❑ 6 Close to work/ en route to work
- ❑ 7 Compact
- ❑ 8 Easily accessible by foot/ cycle
- ❑ 9 Friendly atmosphere
- ❑ 10 Good and/ or free car parking
- ❑ 11 Good bus service/ accessible public transport
- ❑ 12 Good disabled access
- ❑ 13 Good prices
- ❑ 14 Good range of chain/ well known stores
- ❑ 15 Good range of independent stores
- ❑ 16 Particular store (specify) ______
- ❑ 17 Habit/ always used it
- ❑ 18 Indoor shopping malls/ arcades
- ❑ 19 Large shopping area
- ❑ 20 Market
- ❑ 21 Not overcrowded / not too busy
- ❑ 22 Opening hours
- ❑ 23 Part of an overall day out
- ❑ 24 Pedestrianised
- ❑ 25 Range of goods available
- ❑ 26 Restaurant / cafes
- ❑ 27 Safe shopping environment
- ❑ 28 Nothing / very little
- ❑ 29 Other (specify) ______

If Size(??Q10_1??) + Size(??Q10_2??) = 0, Prompt interviewee with message 'You must select at least one response Please amend'

Q11. Where do you normally do most of your households shopping for small domestic electrical appliances (such as irons, kettles, fans, coffee makers, food mixers etc)?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER.

- ❑ 1 Argos, Guy Street, Leamington Spa
- ❑ 2 Argos, Leamington Retail Park
- ❑ 3 Argos, Leamington Shopping Park, Leamington Spa
- ❑ 4 Asda Living, Warwickshire Shopping Park, Coventry
- ❑ 5 Asda, Chesterton Drive, Leamington Spa
- ❑ 6 B&Q, Alvis Retail Park, Coventry
- ❑ 7 Boots, Bertie Road, Kenilworth
- ❑ 8 Boots, Leamington Shopping Park, Leamington Spa
- ❑ 9 Boots, Market Street, Warwick
- ❑ 10 Boots, Oxford Street, Leamington Spa
- ❑ 11 Boots, Station Road, Kenilworth
- ❑ 12 Boots, The Parade, Leamington Spa
- ❑ 13 Carpet Right, Leamington Shopping Park, Leamington Spa
- ❑ 14 Co-op 34-56 Clemens Street, Leamington Spa
- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, High Street, Leamington Spa
- ❑ 17 Currys, Orchard Retail Park, Coventry
- ❑ 18 Currys, Tachbrook Park Drive, Leamington Spa
- ❑ 19 Dreams, Myton Road, Leamington Spa
- ❑ 20 Focus, Leamington Shopping Park, Leamington Spa
- ❑ 21 Halfords, Leamington Shopping Park, Leamington Spa
- ❑ 22 Homebase, Ernscote Road, Leamington Spa
- ❑ 23 Homebase, Myton Road, Leamington Spa
- ❑ 24 House of Fraser, The Parade, Leamington Spa
- ❑ 25 Ikea, Croft Road, Coventry
- ❑ 26 Lidl, Myton Road, Leamington Spa
- ❑ 27 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 28 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 29 Next, Leamington Shopping Park, Leamington Spa
- ❑ 30 Next, The Parade, Leamington Spa
- ❑ 31 Pets at Home, Myton Road, Leamington Spa
- ❑ 32 Roseby / Benson Beds, Leamington Shopping Park, Leamington Spa
- ❑ 33 Sainsbury's, 2 Park Street, Warwick
- ❑ 34 Sainsbury's, Coton End, Warwick
- ❑ 35 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 36 Sainsbury's, Saltisford, Warwick
- ❑ 37 Sainsbury's, Warwick Road, Kenilworth
- ❑ 38 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 39 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 40 Tesco, Emscote Road, Warwick
- ❑ 41 Wilkinsons, Cannon Park Shopping Centre, Coventry
- ❑ 42 Wilkinsons, Station Road, Kenilworth
- ❑ 43 Kenilworth Town Centre
- ❑ 44 Leamington Spa Town Centre
- ❑ 45 Warwick Town Centre
- ❑ 46 Alcester
- ❑ 47 Banbury
- ❑ 48 Birmingham - Acocks Green
- ❑ 49 Birmingham - City Centre
- ❑ 50 Birmingham - Hall Green
- ❑ 51 Birmingham - Moseley
- ❑ 52 Birmingham - Sparkhill
- ❑ 53 Birmingham - Stirchley
- ❑ 54 Coventry
- ❑ 55 Daventry

- ❑ 56 Knowle
- ❑ 57 Milton Keynes
- ❑ 58 Northampton
- ❑ 59 Nuneaton
- ❑ 60 Redditch
- ❑ 61 Rugby
- ❑ 62 Shirley
- ❑ 63 Solihull
- ❑ 64 Stratford-upon-Avon
- ❑ 65 Welltham
- ❑ 66 Alvis Retail Park, Coventry
- ❑ 67 Gallagher Retail Park, Coventry
- ❑ 68 Leamington Shopping Park, Leamington Spa
- ❑ 69 Orchard Retail Park, Coventry
- ❑ 70 Warwickshire Retail Park, Coventry
- ❑ 71 Catalogue / Mail Order
- ❑ 72 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 73 Don't buy
- ❑ 74 Other (specify) ____________

If = 72, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other'   E.G. 'Internet - Amazon''

Q12. Where do you normally do most of your households shopping for recording media for pictures and sound (e.g. records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc.)(Exludes video games)?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER.

- ❑ 1 Argos, Guy Street, Leamington Spa
- ❑ 2 Argos, Leamington Retail Park
- ❑ 3 Argos, Leamington Shopping Park, Leamington Spa
- ❑ 4 Asda Living, Warwickshire Shopping Park, Coventry
- ❑ 5 Asda, Chesterton Drive, Leamington Spa
- ❑ 6 B&Q, Alvis Retail Park, Coventry
- ❑ 7 Boots, Bertie Road, Kenilworth
- ❑ 8 Boots, Leamington Shopping Park, Leamington Spa
- ❑ 9 Boots, Market Street, Warwick
- ❑ 10 Boots, Oxford Street, Leamington Spa
- ❑ 11 Boots, Station Road, Kenilworth
- ❑ 12 Boots, The Parade, Leamington Spa
- ❑ 13 Carpet Right, Leamington Shopping Park, Leamington Spa
- ❑ 14 Co-op 34-56 Clemens Street, Leamington Spa
- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, High Street, Leamington Spa
- ❑ 17 Currys, Orchard Retail Park, Coventry
- ❑ 18 Currys, Tachbrook Park Drive, Leamington Spa
- ❑ 19 Dreams, Myton Road, Leamington Spa
- ❑ 20 Focus, Leamington Shopping Park, Leamington Spa
- ❑ 21 Halfords, Leamington Shopping Park, Leamington Spa
- ❑ 22 Homebase, Ernscote Road, Leamington Spa
- ❑ 23 Homebase, Myton Road, Leamington Spa
- ❑ 24 House of Fraser, The Parade, Leamington Spa
- ❑ 25 Ikea, Croft Road, Coventry
- ❑ 26 Lidl, Myton Road, Leamington Spa
- ❑ 27 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 28 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 29 Next, Leamington Shopping Park, Leamington Spa
- ❑ 30 Next, The Parade, Leamington Spa
- ❑ 31 Pets at Home, Myton Road, Leamington Spa
- ❑ 32 Roseby / Benson Beds, Leamington Shopping Park, Leamington Spa
- ❑ 33 Sainsbury's, 2 Park Street, Warwick
- ❑ 34 Sainsbury's, Coton End, Warwick

- ❑ 35 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 36 Sainsbury's, Saltisford, Warwick
- ❑ 37 Sainsbury's, Warwick Road, Kenilworth
- ❑ 38 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 39 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 40 Tesco, Emscote Road, Warwick
- ❑ 41 Wilkinsons, Cannon Park Shopping Centre, Coventry
- ❑ 42 Wilkinsons, Station Road, Kenilworth
- ❑ 43 Kenilworth Town Centre
- ❑ 44 Leamington Spa Town Centre
- ❑ 45 Warwick Town Centre
- ❑ 46 Alcester
- ❑ 47 Banbury
- ❑ 48 Birmingham - Acocks Green
- ❑ 49 Birmingham - City Centre
- ❑ 50 Birmingham - Hall Green
- ❑ 51 Birmingham - Moseley
- ❑ 52 Birmingham - Sparkhill
- ❑ 53 Birmingham - Stirchley
- ❑ 54 Coventry
- ❑ 55 Daventry
- ❑ 56 Knowle
- ❑ 57 Milton Keynes
- ❑ 58 Northampton
- ❑ 59 Nuneaton
- ❑ 60 Redditch
- ❑ 61 Rugby
- ❑ 62 Shirley
- ❑ 63 Solihull
- ❑ 64 Stratford-upon-Avon
- ❑ 65 Welltham
- ❑ 66 Alvis Retail Park, Coventry
- ❑ 67 Gallagher Retail Park, Coventry
- ❑ 68 Leamington Shopping Park, Leamington Spa
- ❑ 69 Orchard Retail Park, Coventry
- ❑ 70 Warwickshire Retail Park, Coventry
- ❑ 71 Catalogue / Mail Order
- ❑ 72 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 73 Don't buy
- ❑ 74 Other (specify) ________

If = 72, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other' *E.G. 'Internet - Amazon''*

Q13. Where do you normally do most of your households shopping for audio visual, photographic, computer items (such as stereos, radios, TVs, software, cameras, telephones, etc.)?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER.

- ❑ 1 Argos, Guy Street, Leamington Spa
- ❑ 2 Argos, Leamington Retail Park
- ❑ 3 Argos, Leamington Shopping Park, Leamington Spa
- ❑ 4 Asda Living, Warwickshire Shopping Park, Coventry
- ❑ 5 Asda, Chesterton Drive, Leamington Spa
- ❑ 6 B&Q, Alvis Retail Park, Coventry
- ❑ 7 Boots, Bertie Road, Kenilworth
- ❑ 8 Boots, Leamington Shopping Park, Leamington Spa
- ❑ 9 Boots, Market Street, Warwick
- ❑ 10 Boots, Oxford Street, Leamington Spa
- ❑ 11 Boots, Station Road, Kenilworth
- ❑ 12 Boots, The Parade, Leamington Spa
- ❑ 13 Carpet Right, Leamington Shopping Park, Leamington Spa

- ❑ 14 Co-op 34-56 Clemens Street, Leamington Spa
- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, High Street, Leamington Spa
- ❑ 17 Currys, Orchard Retail Park, Coventry
- ❑ 18 Currys, Tachbrook Park Drive, Leamington Spa
- ❑ 19 Dreams, Myton Road, Leamington Spa
- ❑ 20 Focus, Leamington Shopping Park, Leamington Spa
- ❑ 21 Halfords, Leamington Shopping Park, Leamington Spa
- ❑ 22 Homebase, Ernscote Road, Leamington Spa
- ❑ 23 Homebase, Myton Road, Leamington Spa
- ❑ 24 House of Fraser, The Parade, Leamington Spa
- ❑ 25 Ikea, Croft Road, Coventry
- ❑ 26 Lidl, Myton Road, Leamington Spa
- ❑ 27 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 28 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 29 Next, Leamington Shopping Park, Leamington Spa
- ❑ 30 Next, The Parade, Leamington Spa
- ❑ 31 Pets at Home, Myton Road, Leamington Spa
- ❑ 32 Roseby / Benson Beds, Leamington Shopping Park, Leamington Spa
- ❑ 33 Sainsbury's, 2 Park Street, Warwick
- ❑ 34 Sainsbury's, Coton End, Warwick
- ❑ 35 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 36 Sainsbury's, Saltisford, Warwick
- ❑ 37 Sainsbury's, Warwick Road, Kenilworth
- ❑ 38 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 39 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 40 Tesco, Emscote Road, Warwick
- ❑ 41 Wilkinsons, Cannon Park Shopping Centre, Coventry
- ❑ 42 Wilkinsons, Station Road, Kenilworth
- ❑ 43 Kenilworth Town Centre
- ❑ 44 Leamington Spa Town Centre
- ❑ 45 Warwick Town Centre
- ❑ 46 Alcester
- ❑ 47 Banbury
- ❑ 48 Birmingham - Acocks Green
- ❑ 49 Birmingham - City Centre
- ❑ 50 Birmingham - Hall Green
- ❑ 51 Birmingham - Moseley
- ❑ 52 Birmingham - Sparkhill
- ❑ 53 Birmingham - Stirchley
- ❑ 54 Coventry
- ❑ 55 Daventry
- ❑ 56 Knowle
- ❑ 57 Milton Keynes
- ❑ 58 Northampton
- ❑ 59 Nuneaton
- ❑ 60 Redditch
- ❑ 61 Rugby
- ❑ 62 Shirley
- ❑ 63 Solihull
- ❑ 64 Stratford-upon-Avon
- ❑ 65 Welltham
- ❑ 66 Alvis Retail Park, Coventry
- ❑ 67 Gallagher Retail Park, Coventry
- ❑ 68 Leamington Shopping Park, Leamington Spa
- ❑ 69 Orchard Retail Park, Coventry
- ❑ 70 Warwickshire Retail Park, Coventry
- ❑ 71 Catalogue / Mail Order
- ❑ 72 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 73 Don't buy
- ❑ 74 Other (specify) ____________

If = 72, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other' E.G. 'Internet - Amazon''

Q14. Where do you normally do most of your household's shopping for games & toys; hobby items; sport and camping goods; and musical instruments?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER.

- ❑ 1 Argos, Guy Street, Leamington Spa
- ❑ 2 Argos, Leamington Retail Park
- ❑ 3 Argos, Leamington Shopping Park, Leamington Spa
- ❑ 4 Asda Living, Warwickshire Shopping Park, Coventry
- ❑ 5 Asda, Chesterton Drive, Leamington Spa
- ❑ 6 B&Q, Alvis Retail Park, Coventry
- ❑ 7 Boots, Bertie Road, Kenilworth
- ❑ 8 Boots, Leamington Shopping Park, Leamington Spa
- ❑ 9 Boots, Market Street, Warwick
- ❑ 10 Boots, Oxford Street, Leamington Spa
- ❑ 11 Boots, Station Road, Kenilworth
- ❑ 12 Boots, The Parade, Leamington Spa
- ❑ 13 Carpet Right, Leamington Shopping Park, Leamington Spa
- ❑ 14 Co-op 34-56 Clemens Street, Leamington Spa
- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, High Street, Leamington Spa
- ❑ 17 Currys, Orchard Retail Park, Coventry
- ❑ 18 Currys, Tachbrook Park Drive, Leamington Spa
- ❑ 19 Dreams, Myton Road, Leamington Spa
- ❑ 20 Focus, Leamington Shopping Park, Leamington Spa
- ❑ 21 Halfords, Leamington Shopping Park, Leamington Spa
- ❑ 22 Homebase, Ernscote Road, Leamington Spa
- ❑ 23 Homebase, Myton Road, Leamington Spa
- ❑ 24 House of Fraser, The Parade, Leamington Spa
- ❑ 25 Ikea, Croft Road, Coventry
- ❑ 26 Lidl, Myton Road, Leamington Spa
- ❑ 27 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 28 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 29 Next, Leamington Shopping Park, Leamington Spa
- ❑ 30 Next, The Parade, Leamington Spa
- ❑ 31 Pets at Home, Myton Road, Leamington Spa
- ❑ 32 Roseby / Benson Beds, Leamington Shopping Park, Leamington Spa
- ❑ 33 Sainsbury's, 2 Park Street, Warwick
- ❑ 34 Sainsbury's, Coton End, Warwick
- ❑ 35 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 36 Sainsbury's, Saltisford, Warwick
- ❑ 37 Sainsbury's, Warwick Road, Kenilworth
- ❑ 38 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 39 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 40 Tesco, Emscote Road, Warwick
- ❑ 41 Wilkinsons, Cannon Park Shopping Centre, Coventry
- ❑ 42 Wilkinsons, Station Road, Kenilworth
- ❑ 43 Kenilworth Town Centre
- ❑ 44 Leamington Spa Town Centre
- ❑ 45 Warwick Town Centre
- ❑ 46 Alcester
- ❑ 47 Banbury
- ❑ 48 Birmingham - Acocks Green
- ❑ 49 Birmingham - City Centre
- ❑ 50 Birmingham - Hall Green
- ❑ 51 Birmingham - Moseley
- ❑ 52 Birmingham - Sparkhill
- ❑ 53 Birmingham - Stirchley
- ❑ 54 Coventry
- ❑ 55 Daventry

- ❑ 56 Knowle
- ❑ 57 Milton Keynes
- ❑ 58 Northampton
- ❑ 59 Nuneaton
- ❑ 60 Redditch
- ❑ 61 Rugby
- ❑ 62 Shirley
- ❑ 63 Solihull
- ❑ 64 Stratford-upon-Avon
- ❑ 65 Welltham
- ❑ 66 Alvis Retail Park, Coventry
- ❑ 67 Gallagher Retail Park, Coventry
- ❑ 68 Leamington Shopping Park, Leamington Spa
- ❑ 69 Orchard Retail Park, Coventry
- ❑ 70 Warwickshire Retail Park, Coventry
- ❑ 71 Catalogue / Mail Order
- ❑ 72 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 73 Don't buy
- ❑ 74 Other (specify) ____________

If = 72, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other' *E.G. 'Internet - Amazon''*

Q15. Where do you normally do most of your household's shopping for pets & pet related products?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER.

- ❑ 1 Argos, Guy Street, Leamington Spa
- ❑ 2 Argos, Leamington Retail Park
- ❑ 3 Argos, Leamington Shopping Park, Leamington Spa
- ❑ 4 Asda Living, Warwickshire Shopping Park, Coventry
- ❑ 5 Asda, Chesterton Drive, Leamington Spa
- ❑ 6 B&Q, Alvis Retail Park, Coventry
- ❑ 7 Boots, Bertie Road, Kenilworth
- ❑ 8 Boots, Leamington Shopping Park, Leamington Spa
- ❑ 9 Boots, Market Street, Warwick
- ❑ 10 Boots, Oxford Street, Leamington Spa
- ❑ 11 Boots, Station Road, Kenilworth
- ❑ 12 Boots, The Parade, Leamington Spa
- ❑ 13 Carpet Right, Leamington Shopping Park, Leamington Spa
- ❑ 14 Co-op 34-56 Clemens Street, Leamington Spa
- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, High Street, Leamington Spa
- ❑ 17 Currys, Orchard Retail Park, Coventry
- ❑ 18 Currys, Tachbrook Park Drive, Leamington Spa
- ❑ 19 Dreams, Myton Road, Leamington Spa
- ❑ 20 Focus, Leamington Shopping Park, Leamington Spa
- ❑ 21 Halfords, Leamington Shopping Park, Leamington Spa
- ❑ 22 Homebase, Ernscote Road, Leamington Spa
- ❑ 23 Homebase, Myton Road, Leamington Spa
- ❑ 24 House of Fraser, The Parade, Leamington Spa
- ❑ 25 Ikea, Croft Road, Coventry
- ❑ 26 Lidl, Myton Road, Leamington Spa
- ❑ 27 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 28 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 29 Next, Leamington Shopping Park, Leamington Spa
- ❑ 30 Next, The Parade, Leamington Spa
- ❑ 31 Pets at Home, Myton Road, Leamington Spa
- ❑ 32 Roseby / Benson Beds, Leamington Shopping Park, Leamington Spa
- ❑ 33 Sainsbury's, 2 Park Street, Warwick
- ❑ 34 Sainsbury's, Coton End, Warwick
- ❑ 35 Sainsbury's, Leamington Shopping Park, Leamington Spa

- ❑ 36 Sainsbury's, Saltisford, Warwick
- ❑ 37 Sainsbury's, Warwick Road, Kenilworth
- ❑ 38 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 39 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 40 Tesco, Emscote Road, Warwick
- ❑ 41 Wilkinsons, Cannon Park Shopping Centre, Coventry
- ❑ 42 Wilkinsons, Station Road, Kenilworth
- ❑ 43 Kenilworth Town Centre
- ❑ 44 Leamington Spa Town Centre
- ❑ 45 Warwick Town Centre
- ❑ 46 Alcester
- ❑ 47 Banbury
- ❑ 48 Birmingham - Acocks Green
- ❑ 49 Birmingham - City Centre
- ❑ 50 Birmingham - Hall Green
- ❑ 51 Birmingham - Moseley
- ❑ 52 Birmingham - Sparkhill
- ❑ 53 Birmingham - Stirchley
- ❑ 54 Coventry
- ❑ 55 Daventry
- ❑ 56 Knowle
- ❑ 57 Milton Keynes
- ❑ 58 Northampton
- ❑ 59 Nuneaton
- ❑ 60 Redditch
- ❑ 61 Rugby
- ❑ 62 Shirley
- ❑ 63 Solihull
- ❑ 64 Stratford-upon-Avon
- ❑ 65 Welltham
- ❑ 66 Alvis Retail Park, Coventry
- ❑ 67 Gallagher Retail Park, Coventry
- ❑ 68 Leamington Shopping Park, Leamington Spa
- ❑ 69 Orchard Retail Park, Coventry
- ❑ 70 Warwickshire Retail Park, Coventry
- ❑ 71 Catalogue / Mail Order
- ❑ 72 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 73 Don't buy
- ❑ 74 Other (specify) ______

If = 72, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other' E.G. 'Internet - Amazon''

Q16. Where do you normally do most of your households shopping for books (incl. dictionaries, encyclopaedias, text books, guidebooks and musical scores) and stationary (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER.

- ❑ 1 Argos, Guy Street, Leamington Spa
- ❑ 2 Argos, Leamington Retail Park
- ❑ 3 Argos, Leamington Shopping Park, Leamington Spa
- ❑ 4 Asda Living, Warwickshire Shopping Park, Coventry
- ❑ 5 Asda, Chesterton Drive, Leamington Spa
- ❑ 6 B&Q, Alvis Retail Park, Coventry
- ❑ 7 Boots, Bertie Road, Kenilworth
- ❑ 8 Boots, Leamington Shopping Park, Leamington Spa
- ❑ 9 Boots, Market Street, Warwick
- ❑ 10 Boots, Oxford Street, Leamington Spa
- ❑ 11 Boots, Station Road, Kenilworth
- ❑ 12 Boots, The Parade, Leamington Spa
- ❑ 13 Carpet Right, Leamington Shopping Park, Leamington Spa
- ❑ 14 Co-op 34-56 Clemens Street, Leamington Spa

- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, High Street, Leamington Spa
- ❑ 17 Currys, Orchard Retail Park, Coventry
- ❑ 18 Currys, Tachbrook Park Drive, Leamington Spa
- ❑ 19 Dreams, Myton Road, Leamington Spa
- ❑ 20 Focus, Leamington Shopping Park, Leamington Spa
- ❑ 21 Halfords, Leamington Shopping Park, Leamington Spa
- ❑ 22 Homebase, Ernscote Road, Leamington Spa
- ❑ 23 Homebase, Myton Road, Leamington Spa
- ❑ 24 House of Fraser, The Parade, Leamington Spa
- ❑ 25 Ikea, Croft Road, Coventry
- ❑ 26 Lidl, Myton Road, Leamington Spa
- ❑ 27 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 28 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 29 Next, Leamington Shopping Park, Leamington Spa
- ❑ 30 Next, The Parade, Leamington Spa
- ❑ 31 Pets at Home, Myton Road, Leamington Spa
- ❑ 32 Roseby / Benson Beds, Leamington Shopping Park, Leamington Spa
- ❑ 33 Sainsbury's, 2 Park Street, Warwick
- ❑ 34 Sainsbury's, Coton End, Warwick
- ❑ 35 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 36 Sainsbury's, Saltisford, Warwick
- ❑ 37 Sainsbury's, Warwick Road, Kenilworth
- ❑ 38 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 39 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 40 Tesco, Emscote Road, Warwick
- ❑ 41 Wilkinsons, Cannon Park Shopping Centre, Coventry
- ❑ 42 Wilkinsons, Station Road, Kenilworth
- ❑ 43 Kenilworth Town Centre
- ❑ 44 Leamington Spa Town Centre
- ❑ 45 Warwick Town Centre
- ❑ 46 Alcester
- ❑ 47 Banbury
- ❑ 48 Birmingham - Acocks Green
- ❑ 49 Birmingham - City Centre
- ❑ 50 Birmingham - Hall Green
- ❑ 51 Birmingham - Moseley
- ❑ 52 Birmingham - Sparkhill
- ❑ 53 Birmingham - Stirchley
- ❑ 54 Coventry
- ❑ 55 Daventry
- ❑ 56 Knowle
- ❑ 57 Milton Keynes
- ❑ 58 Northampton
- ❑ 59 Nuneaton
- ❑ 60 Redditch
- ❑ 61 Rugby
- ❑ 62 Shirley
- ❑ 63 Solihull
- ❑ 64 Stratford-upon-Avon
- ❑ 65 Welltham
- ❑ 66 Alvis Retail Park, Coventry
- ❑ 67 Gallagher Retail Park, Coventry
- ❑ 68 Leamington Shopping Park, Leamington Spa
- ❑ 69 Orchard Retail Park, Coventry
- ❑ 70 Warwickshire Retail Park, Coventry
- ❑ 71 Catalogue / Mail Order
- ❑ 72 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 73 Don't buy
- ❑ 74 Other (specify) ______

If = 72, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other' *E.G. 'Internet - Amazon''*

Q17. Where do you normally do most of your households shopping on personal/luxury goods including jewellery, china, glass, medicine and cosmetics?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER.

- ❑ 1 Argos, Guy Street, Leamington Spa
- ❑ 2 Argos, Leamington Retail Park
- ❑ 3 Argos, Leamington Shopping Park, Leamington Spa
- ❑ 4 Asda Living, Warwickshire Shopping Park, Coventry
- ❑ 5 Asda, Chesterton Drive, Leamington Spa
- ❑ 6 B&Q, Alvis Retail Park, Coventry
- ❑ 7 Boots, Bertie Road, Kenilworth
- ❑ 8 Boots, Leamington Shopping Park, Leamington Spa
- ❑ 9 Boots, Market Street, Warwick
- ❑ 10 Boots, Oxford Street, Leamington Spa
- ❑ 11 Boots, Station Road, Kenilworth
- ❑ 12 Boots, The Parade, Leamington Spa
- ❑ 13 Carpet Right, Leamington Shopping Park, Leamington Spa
- ❑ 14 Co-op 34-56 Clemens Street, Leamington Spa
- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, High Street, Leamington Spa
- ❑ 17 Currys, Orchard Retail Park, Coventry
- ❑ 18 Currys, Tachbrook Park Drive, Leamington Spa
- ❑ 19 Dreams, Myton Road, Leamington Spa
- ❑ 20 Focus, Leamington Shopping Park, Leamington Spa
- ❑ 21 Halfords, Leamington Shopping Park, Leamington Spa
- ❑ 22 Homebase, Ernscote Road, Leamington Spa
- ❑ 23 Homebase, Myton Road, Leamington Spa
- ❑ 24 House of Fraser, The Parade, Leamington Spa
- ❑ 25 Ikea, Croft Road, Coventry
- ❑ 26 Lidl, Myton Road, Leamington Spa
- ❑ 27 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 28 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 29 Next, Leamington Shopping Park, Leamington Spa
- ❑ 30 Next, The Parade, Leamington Spa
- ❑ 31 Pets at Home, Myton Road, Leamington Spa
- ❑ 32 Roseby / Benson Beds, Leamington Shopping Park, Leamington Spa
- ❑ 33 Sainsbury's, 2 Park Street, Warwick
- ❑ 34 Sainsbury's, Coton End, Warwick
- ❑ 35 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 36 Sainsbury's, Saltisford, Warwick
- ❑ 37 Sainsbury's, Warwick Road, Kenilworth
- ❑ 38 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 39 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 40 Tesco, Emscote Road, Warwick
- ❑ 41 Wilkinsons, Cannon Park Shopping Centre, Coventry
- ❑ 42 Wilkinsons, Station Road, Kenilworth
- ❑ 43 Kenilworth Town Centre
- ❑ 44 Leamington Spa Town Centre
- ❑ 45 Warwick Town Centre
- ❑ 46 Alcester
- ❑ 47 Banbury
- ❑ 48 Birmingham - Acocks Green
- ❑ 49 Birmingham - City Centre
- ❑ 50 Birmingham - Hall Green
- ❑ 51 Birmingham - Moseley
- ❑ 52 Birmingham - Sparkhill
- ❑ 53 Birmingham - Stirchley
- ❑ 54 Coventry
- ❑ 55 Daventry

- ❑ 56 Knowle
- ❑ 57 Milton Keynes
- ❑ 58 Northampton
- ❑ 59 Nuneaton
- ❑ 60 Redditch
- ❑ 61 Rugby
- ❑ 62 Shirley
- ❑ 63 Solihull
- ❑ 64 Stratford-upon-Avon
- ❑ 65 Welltham
- ❑ 66 Alvis Retail Park, Coventry
- ❑ 67 Gallagher Retail Park, Coventry
- ❑ 68 Leamington Shopping Park, Leamington Spa
- ❑ 69 Orchard Retail Park, Coventry
- ❑ 70 Warwickshire Retail Park, Coventry
- ❑ 71 Catalogue / Mail Order
- ❑ 72 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 73 Don't buy
- ❑ 74 Other (specify) ____

If = 72, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other' *E.G. 'Internet - Amazon''*

Q18. Where do you normally do most of your households shopping for furniture, carpets, other floor coverings and household textiles (includes beds, sofas, tables, etc)?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER.

- ❑ 1 Argos, Guy Street, Leamington Spa
- ❑ 2 Argos, Leamington Retail Park
- ❑ 3 Argos, Leamington Shopping Park, Leamington Spa
- ❑ 4 Asda Living, Warwickshire Shopping Park, Coventry
- ❑ 5 Asda, Chesterton Drive, Leamington Spa
- ❑ 6 B&Q, Alvis Retail Park, Coventry
- ❑ 7 Boots, Bertie Road, Kenilworth
- ❑ 8 Boots, Leamington Shopping Park, Leamington Spa
- ❑ 9 Boots, Market Street, Warwick
- ❑ 10 Boots, Oxford Street, Leamington Spa
- ❑ 11 Boots, Station Road, Kenilworth
- ❑ 12 Boots, The Parade, Leamington Spa
- ❑ 13 Carpet Right, Leamington Shopping Park, Leamington Spa
- ❑ 14 Co-op 34-56 Clemens Street, Leamington Spa
- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, High Street, Leamington Spa
- ❑ 17 Currys, Orchard Retail Park, Coventry
- ❑ 18 Currys, Tachbrook Park Drive, Leamington Spa
- ❑ 19 Dreams, Myton Road, Leamington Spa
- ❑ 20 Focus, Leamington Shopping Park, Leamington Spa
- ❑ 21 Halfords, Leamington Shopping Park, Leamington Spa
- ❑ 22 Homebase, Ernscote Road, Leamington Spa
- ❑ 23 Homebase, Myton Road, Leamington Spa
- ❑ 24 House of Fraser, The Parade, Leamington Spa
- ❑ 25 Ikea, Croft Road, Coventry
- ❑ 26 Lidl, Myton Road, Leamington Spa
- ❑ 27 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 28 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 29 Next, Leamington Shopping Park, Leamington Spa
- ❑ 30 Next, The Parade, Leamington Spa
- ❑ 31 Pets at Home, Myton Road, Leamington Spa
- ❑ 32 Roseby / Benson Beds, Leamington Shopping Park, Leamington Spa
- ❑ 33 Sainsbury's, 2 Park Street, Warwick
- ❑ 34 Sainsbury's, Coton End, Warwick
- ❑ 35 Sainsbury's, Leamington Shopping Park, Leamington Spa

- ❑ 36 Sainsbury's, Saltisford, Warwick
- ❑ 37 Sainsbury's, Warwick Road, Kenilworth
- ❑ 38 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 39 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 40 Tesco, Emscote Road, Warwick
- ❑ 41 Wilkinsons, Cannon Park Shopping Centre, Coventry
- ❑ 42 Wilkinsons, Station Road, Kenilworth
- ❑ 43 Kenilworth Town Centre
- ❑ 44 Leamington Spa Town Centre
- ❑ 45 Warwick Town Centre
- ❑ 46 Alcester
- ❑ 47 Banbury
- ❑ 48 Birmingham - Acocks Green
- ❑ 49 Birmingham - City Centre
- ❑ 50 Birmingham - Hall Green
- ❑ 51 Birmingham - Moseley
- ❑ 52 Birmingham - Sparkhill
- ❑ 53 Birmingham - Stirchley
- ❑ 54 Coventry
- ❑ 55 Daventry
- ❑ 56 Knowle
- ❑ 57 Milton Keynes
- ❑ 58 Northampton
- ❑ 59 Nuneaton
- ❑ 60 Redditch
- ❑ 61 Rugby
- ❑ 62 Shirley
- ❑ 63 Solihull
- ❑ 64 Stratford-upon-Avon
- ❑ 65 Welltham
- ❑ 66 Alvis Retail Park, Coventry
- ❑ 67 Gallagher Retail Park, Coventry
- ❑ 68 Leamington Shopping Park, Leamington Spa
- ❑ 69 Orchard Retail Park, Coventry
- ❑ 70 Warwickshire Retail Park, Coventry
- ❑ 71 Catalogue / Mail Order
- ❑ 72 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 73 Don't buy
- ❑ 74 Other (specify) ________

If = 72, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other' E.G. 'Internet - Amazon''

Q19. Where do you normally do most of your household's shopping for DIY goods, decorating supplies and garden products (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc)?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER.

- ❑ 1 Argos, Guy Street, Leamington Spa
- ❑ 2 Argos, Leamington Retail Park
- ❑ 3 Argos, Leamington Shopping Park, Leamington Spa
- ❑ 4 Asda Living, Warwickshire Shopping Park, Coventry
- ❑ 5 Asda, Chesterton Drive, Leamington Spa
- ❑ 6 B&Q, Alvis Retail Park, Coventry
- ❑ 7 Boots, Bertie Road, Kenilworth
- ❑ 8 Boots, Leamington Shopping Park, Leamington Spa
- ❑ 9 Boots, Market Street, Warwick
- ❑ 10 Boots, Oxford Street, Leamington Spa
- ❑ 11 Boots, Station Road, Kenilworth
- ❑ 12 Boots, The Parade, Leamington Spa
- ❑ 13 Carpet Right, Leamington Shopping Park, Leamington Spa
- ❑ 14 Co-op 34-56 Clemens Street, Leamington Spa

- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, High Street, Leamington Spa
- ❑ 17 Currys, Orchard Retail Park, Coventry
- ❑ 18 Currys, Tachbrook Park Drive, Leamington Spa
- ❑ 19 Dreams, Myton Road, Leamington Spa
- ❑ 20 Focus, Leamington Shopping Park, Leamington Spa
- ❑ 21 Halfords, Leamington Shopping Park, Leamington Spa
- ❑ 22 Homebase, Ernscote Road, Leamington Spa
- ❑ 23 Homebase, Myton Road, Leamington Spa
- ❑ 24 House of Fraser, The Parade, Leamington Spa
- ❑ 25 Ikea, Croft Road, Coventry
- ❑ 26 Lidl, Myton Road, Leamington Spa
- ❑ 27 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 28 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 29 Next, Leamington Shopping Park, Leamington Spa
- ❑ 30 Next, The Parade, Leamington Spa
- ❑ 31 Pets at Home, Myton Road, Leamington Spa
- ❑ 32 Roseby / Benson Beds, Leamington Shopping Park, Leamington Spa
- ❑ 33 Sainsbury's, 2 Park Street, Warwick
- ❑ 34 Sainsbury's, Coton End, Warwick
- ❑ 35 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 36 Sainsbury's, Saltisford, Warwick
- ❑ 37 Sainsbury's, Warwick Road, Kenilworth
- ❑ 38 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 39 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 40 Tesco, Emscote Road, Warwick
- ❑ 41 Wilkinsons, Cannon Park Shopping Centre, Coventry
- ❑ 42 Wilkinsons, Station Road, Kenilworth
- ❑ 43 Kenilworth Town Centre
- ❑ 44 Leamington Spa Town Centre
- ❑ 45 Warwick Town Centre
- ❑ 46 Alcester
- ❑ 47 Banbury
- ❑ 48 Birmingham - Acocks Green
- ❑ 49 Birmingham - City Centre
- ❑ 50 Birmingham - Hall Green
- ❑ 51 Birmingham - Moseley
- ❑ 52 Birmingham - Sparkhill
- ❑ 53 Birmingham - Stirchley
- ❑ 54 Coventry
- ❑ 55 Daventry
- ❑ 56 Knowle
- ❑ 57 Milton Keynes
- ❑ 58 Northampton
- ❑ 59 Nuneaton
- ❑ 60 Redditch
- ❑ 61 Rugby
- ❑ 62 Shirley
- ❑ 63 Solihull
- ❑ 64 Stratford-upon-Avon
- ❑ 65 Welltham
- ❑ 66 Alvis Retail Park, Coventry
- ❑ 67 Gallagher Retail Park, Coventry
- ❑ 68 Leamington Shopping Park, Leamington Spa
- ❑ 69 Orchard Retail Park, Coventry
- ❑ 70 Warwickshire Retail Park, Coventry
- ❑ 71 Catalogue / Mail Order
- ❑ 72 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 73 Don't buy
- ❑ 74 Other (specify) ____________

If = 72, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other' *E.G. 'Internet - Amazon''*

Q20. Where do you do most of your households shopping for large domestic appliances such as washing machines, fridges, cookers, etc?

DO NOT READ OUT. MARK ONE BOX ONLY.

INTERVIEWER NOTE: PLEASE PROBE FULLY FOR ROAD NAME AND LOCATION IF LOCATED OUT OF CENTRE.

IF INTERNET / CATALOGUE PLEASE RECORD THE NAME OF RETAILER. E.G. 'INTERNET - NAME OF RETAILER' OR 'CATALOGUE - NAME OF RETAILER.

- ❑ 1 Argos, Guy Street, Leamington Spa
- ❑ 2 Argos, Leamington Retail Park
- ❑ 3 Argos, Leamington Shopping Park, Leamington Spa
- ❑ 4 Asda Living, Warwickshire Shopping Park, Coventry
- ❑ 5 Asda, Chesterton Drive, Leamington Spa
- ❑ 6 B&Q, Alvis Retail Park, Coventry
- ❑ 7 Boots, Bertie Road, Kenilworth
- ❑ 8 Boots, Leamington Shopping Park, Leamington Spa
- ❑ 9 Boots, Market Street, Warwick
- ❑ 10 Boots, Oxford Street, Leamington Spa
- ❑ 11 Boots, Station Road, Kenilworth
- ❑ 12 Boots, The Parade, Leamington Spa
- ❑ 13 Carpet Right, Leamington Shopping Park, Leamington Spa
- ❑ 14 Co-op 34-56 Clemens Street, Leamington Spa
- ❑ 15 Co-op, Cressida Drive, Warwick
- ❑ 16 Co-op, High Street, Leamington Spa
- ❑ 17 Currys, Orchard Retail Park, Coventry
- ❑ 18 Currys, Tachbrook Park Drive, Leamington Spa
- ❑ 19 Dreams, Myton Road, Leamington Spa
- ❑ 20 Focus, Leamington Shopping Park, Leamington Spa
- ❑ 21 Halfords, Leamington Shopping Park, Leamington Spa
- ❑ 22 Homebase, Ernscote Road, Leamington Spa
- ❑ 23 Homebase, Myton Road, Leamington Spa
- ❑ 24 House of Fraser, The Parade, Leamington Spa
- ❑ 25 Ikea, Croft Road, Coventry
- ❑ 26 Lidl, Myton Road, Leamington Spa
- ❑ 27 Marks & Spencer, 70 Parade, Leamington Spa
- ❑ 28 Morrisons, Old Warwick Road, Leamington Spa
- ❑ 29 Next, Leamington Shopping Park, Leamington Spa
- ❑ 30 Next, The Parade, Leamington Spa
- ❑ 31 Pets at Home, Myton Road, Leamington Spa
- ❑ 32 Roseby / Benson Beds, Leamington Shopping Park, Leamington Spa
- ❑ 33 Sainsbury's, 2 Park Street, Warwick
- ❑ 34 Sainsbury's, Coton End, Warwick
- ❑ 35 Sainsbury's, Leamington Shopping Park, Leamington Spa
- ❑ 36 Sainsbury's, Saltisford, Warwick
- ❑ 37 Sainsbury's, Warwick Road, Kenilworth
- ❑ 38 Tesco Express, Units 1&2 Leyes Lane, Kenilworth
- ❑ 39 Tesco Metro, 22-24 The Parade, Leamington Spa
- ❑ 40 Tesco, Emscote Road, Warwick
- ❑ 41 Wilkinsons, Cannon Park Shopping Centre, Coventry
- ❑ 42 Wilkinsons, Station Road, Kenilworth
- ❑ 43 Kenilworth Town Centre
- ❑ 44 Leamington Spa Town Centre
- ❑ 45 Warwick Town Centre
- ❑ 46 Alcester
- ❑ 47 Banbury
- ❑ 48 Birmingham - Acocks Green
- ❑ 49 Birmingham - City Centre
- ❑ 50 Birmingham - Hall Green
- ❑ 51 Birmingham - Moseley
- ❑ 52 Birmingham - Sparkhill
- ❑ 53 Birmingham - Stirchley
- ❑ 54 Coventry
- ❑ 55 Daventry

- ❑ 56 Knowle
- ❑ 57 Milton Keynes
- ❑ 58 Northampton
- ❑ 59 Nuneaton
- ❑ 60 Redditch
- ❑ 61 Rugby
- ❑ 62 Shirley
- ❑ 63 Solihull
- ❑ 64 Stratford-upon-Avon
- ❑ 65 Welltham
- ❑ 66 Alvis Retail Park, Coventry
- ❑ 67 Gallagher Retail Park, Coventry
- ❑ 68 Leamington Shopping Park, Leamington Spa
- ❑ 69 Orchard Retail Park, Coventry
- ❑ 70 Warwickshire Retail Park, Coventry
- ❑ 71 Catalogue / Mail Order
- ❑ 72 Internet (specify retailer below e.g. Internet - Tesco)
- ❑ 73 Don't buy
- ❑ 74 Other (specify) ____

If = 72, Prompt interviewee with message 'Please deselect and speciy retailer under 'Other'   E.G. 'Internet - Amazon''

I would now like to ask you some questions about visiting other locations:

Q21. How often do you or your household visit Leamington Spa for shopping?

DO NOT READ OUT. MARK ONE BOX ONLY.

- ❑ 1 Daily
- ❑ 2 Twice a week or more
- ❑ 3 Once a week
- ❑ 4 Every two weeks
- ❑ 5 Monthly
- ❑ 6 Twice monthly
- ❑ 7 Every few months
- ❑ 8 Once a year or less
- ❑ 9 Never

Q22. What, if anything, would make you visit Leamington Spa to shop more often?

DO NOT READ OUT. MARK UP TO THREE RESPONSES ONLY.

(3 maximum responses)

- ❑ 1 Attractive environment
- ❑ 2 Cinema
- ❑ 3 Cleanliness
- ❑ 4 Close to friends/ family
- ❑ 5 Close to home
- ❑ 6 Close to work/ en route to work
- ❑ 7 Compact
- ❑ 8 Easily accessible by foot/ cycle
- ❑ 9 Friendly atmosphere
- ❑ 10 Good and/ or free car parking
- ❑ 11 Good bus service/ accessible public transport
- ❑ 12 Good disabled access
- ❑ 13 Good prices
- ❑ 14 Good range of chain/ well known stores
- ❑ 15 Good range of independent stores
- ❑ 16 Particular store (specify) ____
- ❑ 17 Habit/ always used it
- ❑ 18 Indoor shopping malls/ arcades
- ❑ 19 Large shopping area
- ❑ 20 Market
- ❑ 21 Not overcrowded / not too busy
- ❑ 22 Opening hours
- ❑ 23 Part of an overall day out
- ❑ 24 Pedestrianised
- ❑ 25 Range of goods available
- ❑ 26 Restaurant / cafes

- ❑ 27 Safe shopping environment
- ❑ 28 Nothing / very little
- ❑ 29 Other (specify)

If Size(??Q22_1??) + Size(??Q22_2??) > 3, Prompt interviewee with message 'You may only select up to three responses Please amend'
If Size(??Q22_1??) + Size(??Q22_2??) = 0, Prompt interviewee with message 'You must select at least one response Please amend'

Q23. How often do you or your household visit Warwick Town Centre for shopping?

DO NOT READ OUT. MARK ONE BOX ONLY.

- ❑ 1 Daily
- ❑ 2 Twice a week or more
- ❑ 3 Once a week
- ❑ 4 Every two weeks
- ❑ 5 Monthly
- ❑ 6 Twice monthly
- ❑ 7 Every few months
- ❑ 8 Once a year or less
- ❑ 9 Never

Q24. What, if anything, would make you visit Warwick to shop more often?

DO NOT READ OUT. MARK UP TO THREE RESPONSES ONLY.

(3 maximum responses)

- ❑ 1 Attractive environment
- ❑ 2 Cinema
- ❑ 3 Cleanliness
- ❑ 4 Close to friends/ family
- ❑ 5 Close to home
- ❑ 6 Close to work/ en route to work
- ❑ 7 Compact
- ❑ 8 Easily accessible by foot/ cycle
- ❑ 9 Friendly atmosphere
- ❑ 10 Good and/ or free car parking
- ❑ 11 Good bus service/ accessible public transport
- ❑ 12 Good disabled access
- ❑ 13 Good prices
- ❑ 14 Good range of chain/ well known stores
- ❑ 15 Good range of independent stores
- ❑ 16 Particular store (specify)
- ❑ 17 Habit/ always used it
- ❑ 18 Indoor shopping malls/ arcades
- ❑ 19 Large shopping area
- ❑ 20 Market
- ❑ 21 Not overcrowded / not too busy
- ❑ 22 Opening hours
- ❑ 23 Part of an overall day out
- ❑ 24 Pedestrianised
- ❑ 25 Range of goods available
- ❑ 26 Restaurant / cafes
- ❑ 27 Safe shopping environment
- ❑ 28 Nothing / very little
- ❑ 29 Other (specify)

If Size(??Q24_1??) + Size(??Q24_2??) > 3, Prompt interviewee with message 'You may only select up to three responses Please amend'
If Size(??Q24_1??) + Size(??Q24_2??) = 0, Prompt interviewee with message 'You must select at least one response Please amend'

Q25. How often do you or your household visit Kenilworth for shopping?

DO NOT READ OUT. MARK ONE BOX ONLY.

- ❑ 1 Daily
- ❑ 2 Twice a week or more
- ❑ 3 Once a week
- ❑ 4 Every two weeks
- ❑ 5 Monthly
- ❑ 6 Twice monthly
- ❑ 7 Every few months
- ❑ 8 Once a year or less
- ❑ 9 Never

Q26. What, if anything, would make you visit Kenilworth to shop more often?

DO NOT READ OUT. MARK UP TO THREE RESPONSES ONLY.

(3 maximum responses)

- ❑ 1 Attractive environment
- ❑ 2 Cinema
- ❑ 3 Cleanliness
- ❑ 4 Close to friends/ family
- ❑ 5 Close to home
- ❑ 6 Close to work/ en route to work
- ❑ 7 Compact
- ❑ 8 Easily accessible by foot/ cycle
- ❑ 9 Friendly atmosphere
- ❑ 10 Good and/ or free car parking
- ❑ 11 Good bus service/ accessible public transport
- ❑ 12 Good disabled access
- ❑ 13 Good prices
- ❑ 14 Good range of chain/ well known stores
- ❑ 15 Good range of independent stores
- ❑ 16 Particular store (specify) ______
- ❑ 17 Habit/ always used it
- ❑ 18 Indoor shopping malls/ arcades
- ❑ 19 Large shopping area
- ❑ 20 Market
- ❑ 21 Not overcrowded / not too busy
- ❑ 22 Opening hours
- ❑ 23 Part of an overall day out
- ❑ 24 Pedestrianised
- ❑ 25 Range of goods available
- ❑ 26 Restaurant / cafes
- ❑ 27 Safe shopping environment
- ❑ 28 Nothing / very little
- ❑ 29 Other (specify) ______

If Size(??Q26_1??) + Size(??Q26_2??) > 3, Prompt interviewee with message 'You may only select up to three responses Please amend'
If Size(??Q26_1??) + Size(??Q26_2??) = 0, Prompt interviewee with message 'You must select at least one response Please amend'

Now a few questions about your leisure activities:

Q27. Do you or your household visit the following leisure attractions?

READ OUT. MARK ALL THAT APPLY

IF NO 'OTHER' LEAVE TEXT BOX BLANK. FAILURE TO DO SO WILL AFFECT ROUTING

(8 maximum responses)

❑ 1 Bingo / Casino
❑ 2 Cinema
❑ 3 Gym / Healthclub / Sports Facility
❑ 4 Museum / gallery or place of historical / cultural interest / theatre
❑ 5 Pub/ Bar / nightclub / music venue
❑ 6 Restaurant
❑ 7 Tenpin bowling
❑ 8 None of the above (DO NOT READ OUT)
❑ 9 Other (specify) ________

If <> 1, do not ask 'Q27a'
If <> 2, do not ask 'Q27b'
If <> 3, do not ask 'Q27c'
If <> 4, do not ask 'Q27d'
If <> 5, do not ask 'Q27e'
If <> 6, do not ask 'Q27f'
If <> 7, do not ask 'Q27g'
If = 8, do not ask 'Q27'
If true, set '+??Q27_1?? Union On(??Q27aOther?? <> "",8,0)' to question 'Q27LOOP'
If Size(??Q27_1??) = 0 AND ??Q27aOther?? = "", Prompt interviewee with message 'You must select at least one response or enter an 'Other' response Please Amend'
If ??Q27aOther?? ="", do not ask 'Q27h'
If ??Q27_1?? Has 8, Prompt interviewee with message 'Select 'Yes' to confirm that no other leisure activity is selected'

Q27. How often do you or your household visit the following leisure attractions?

READ OUT. MARK ONE BOX PER ROW

	1 Once a week	2 Once a fortnight	3 Once a month	4 Once every two months	5 Once every six months	6 Once a year	7 Don't know / varies (DO NOT READ OUT)
Bingo / Casino	❑	❑	❑	❑	❑	❑	❑
Cinema	❑	❑	❑	❑	❑	❑	❑
Gym / Healthclub / Sports Facility	❑	❑	❑	❑	❑	❑	❑
Museum / gallery or place of historical / cultural interest / theatre	❑	❑	❑	❑	❑	❑	❑
Pub/ Bar / nightclub / music venue	❑	❑	❑	❑	❑	❑	❑
Restaurant	❑	❑	❑	❑	❑	❑	❑
Tenpin bowling	❑	❑	❑	❑	❑	❑	❑
??Q27aOther??	❑	❑	❑	❑	❑	❑	❑

Q27a. Where do you or members of your household normally go to play bingo?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF 'OTHER' OR RESPONDENT STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA.

- ❑ 1 Canley Sports & Social Club, Marler Road, Coventry
- ❑ 2 Cheylesmore Social Club, Quinton Park, Chelyesmore, Coventry
- ❑ 3 Gala Bingo, Banbury
- ❑ 4 Gala Bingo, Coventry
- ❑ 5 Gala Bingo, North Street, Rugby
- ❑ 6 Iris Lees Day Club, Chapel Street, Warwick
- ❑ 7 Kineton Village Hall
- ❑ 8 Pool Meadow
- ❑ 9 Rugby
- ❑ 10 The Nelson Club, Charles Street, Warwick
- ❑ 11 The Royal British Legion, Kimberley Road, Baginton, Coventry
- ❑ 12 The Royal British Legion, Warwick Road, Knowle
- ❑ 13 Tiddington
- ❑ 14 Warwick City Centre
- ❑ 15 Wooton
- ❑ 16 Other (specify) ____________

Q27b. Where do you or members of your household normally go to the cinema?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF 'OTHER' OR RESPONDENT STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA.

- ❑ 1 Apollo, Kingfisher Square, Redditch
- ❑ 2 Cineworld, Leicester Road, Rugby
- ❑ 3 Cineworld, Mill Lane Arcade, Solihull
- ❑ 4 Odeon Cinema, Horse Fair, Banbury
- ❑ 5 Showcase Cinema, Gielgud Way, Cross Point Business Park, Coventry
- ❑ 6 Showcase Cinema, Walsgrave
- ❑ 7 Skydome Arena, Croft Road, Coventry
- ❑ 8 Stratford Picture House, Windsor Street, Stratford-upon-Avon
- ❑ 9 The Apollo, Portland Place East, Leamington Spa
- ❑ 10 The Odeon, Coventry
- ❑ 11 The Royal Cinema, Royal Spas Centre, Leamington Spa
- ❑ 12 UGC Cinema, Ladywell Walk, Birmingham
- ❑ 13 Warwick Arts Centre, Gibbet Hill Road, Coventry
- ❑ 14 Other (specify) ____________

Q27c. Where do you or members of your household normally go to use a gym/healthclub/sports facility?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF 'OTHER' OR RESPONDENT STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA.

- ❑ 1 Alveston Manor Health Centre, Stratford-upon-Avon
- ❑ 2 Ardencote Manor Leisure Club, Warwick
- ❑ 3 AT7, Bell Green Road, Coventry
- ❑ 4 Bannatyne Fitness Ltd, Widney Manor, Saintbury Drive, Solihull
- ❑ 5 Billesley Manor Hotel, Billesley, Alcester
- ❑ 6 Bizz Fitness, Spencer Street, Leamington Spa
- ❑ 7 Brandon Hall Hotel, Main Street, Brandon, Coventry
- ❑ 8 Cannons Health Club
- ❑ 9 Cannons Health Club, Leamington Spa
- ❑ 10 Castle Farm Recreation Centre, Kenilworth
- ❑ 11 Church Hall, Coventry

- ❑ 12 Coventy City Supporters Club, Freehold Street, Coventry
- ❑ 13 David Lloyd, Monkspath Leisure Park, Solihull
- ❑ 14 Esporta, Abbey Road, Coventry
- ❑ 15 Fitness First, Cannon Park, Demontfort Way, Coventry
- ❑ 16 Gilliland Martial Arts Academy, Spencer Street, Leamington Spa
- ❑ 17 Healthworks Fitness Studio, Western Road, Stratford-upon-Avon
- ❑ 18 Holiday Inn, Bridgefoot, Stratford-upon-Avon
- ❑ 19 Holly Trinity Church Old town, Stratford Upon-Avon
- ❑ 20 John Atkinson Sports Centre (Myton School), Warwick
- ❑ 21 LA Fitness, Warwick
- ❑ 22 Leamington Spa
- ❑ 23 Leamington Spa Tennis Club
- ❑ 24 Leisure Centre, Stratford-upon-Avon
- ❑ 25 Living Well Health Club, Hilton National, Warwick
- ❑ 26 Macdonald Hotels, Banbury Road, Stratford-Upon-Avon
- ❑ 27 Meadows Community Sports Centre (Kenilworth School), Kenilworth
- ❑ 28 Midland Sports Centre, Cromwell Lane, Coventry
- ❑ 29 Newbold Comyn Leisure Centre, Leamington Spa
- ❑ 30 Nuffield Health, Warwick
- ❑ 31 Personal trainer, Leamington Spa
- ❑ 32 Pinkx Gym, Coventry
- ❑ 33 Pinx Fitness, Radford Road, Leamington Spa
- ❑ 34 Pure Health Club, Bedford Street, Leamington Spa
- ❑ 35 Results 4 U, Campion School, Sydenham Drive, Leamington Spa
- ❑ 36 Rugby School gymnasiuim, Barby Road, Rugby
- ❑ 37 Southam
- ❑ 38 Southam Leisure Centre, Welsh Road West, Southam
- ❑ 39 St. Nicholas Park Leisure Centre, Warwick
- ❑ 40 Stockton
- ❑ 41 Stratford Leisure & Visitor Centre, Bridgefoot, Stratford-up
- ❑ 42 Studley Leisure Centre, Pool Road, Studley
- ❑ 43 Sydenham Sports Cetnre (Campion School and Community College), Leamington Spa
- ❑ 44 The Coventry Sports & Leisure Centre, Fairfax Street, Covent
- ❑ 45 The Garden Gym, Leamington Spa
- ❑ 46 The Menzies Spa and Golf Club, Warwick Road, Stratford-upon-
- ❑ 47 The Warwickshire Golf and Country Club, Leek Wootton, Warwick
- ❑ 48 Tudor Grange Leisure Centre, Blossomfield Road, Solihull
- ❑ 49 Village Hotel & Leisure Club, Dolomite Avenue, Coventry
- ❑ 50 Virgin Active, Blythe Gate, Shirley, Solihull
- ❑ 51 Walton Hall, Walton
- ❑ 52 Warwick Boat Club, Mill Street, Warwick
- ❑ 53 Wildmoor Spa & Health Club, Alcester Road, Stratford-upon-Avon
- ❑ 54 Wolston Leisure and Community Centre
- ❑ 55 Kenilworth Town Centre
- ❑ 56 Leamington Spa Town Centre
- ❑ 57 Warwick Town Centre
- ❑ 58 Alcester
- ❑ 59 Banbury
- ❑ 60 Birmingham - Acocks Green
- ❑ 61 Birmingham - Hall Green
- ❑ 62 Birmingham - Moseley
- ❑ 63 Birmingham - Sparkhill
- ❑ 64 Birmingham - Stirchley
- ❑ 65 Coventry
- ❑ 66 Daventry
- ❑ 67 Knowle
- ❑ 68 Milton Keynes
- ❑ 69 Northampton
- ❑ 70 Nuneaton
- ❑ 71 Redditch
- ❑ 72 Rugby
- ❑ 73 Shirley
- ❑ 74 Solihull
- ❑ 75 Stratford-upon-Avon
- ❑ 76 Welltham
- ❑ 77 Varies
- ❑ 78 Other (specify) ________________

Q27d. Where do you or members of your household normally go to a museum, theatre, gallery, or other place of historical/cultural interest?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF 'OTHER' OR RESPONDENT STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA.

- ❑ 1 Alcester
- ❑ 2 Banbury
- ❑ 3 Birmingham - Acocks Green
- ❑ 4 Birmingham - Hall Green
- ❑ 5 Birmingham - Moseley
- ❑ 6 Birmingham - Sparkhill
- ❑ 7 Birmingham - Stirchley
- ❑ 8 Coventry
- ❑ 9 Daventry
- ❑ 10 Kenilworth Town Centre
- ❑ 11 Knowle
- ❑ 12 Leamington Spa Town Centre
- ❑ 13 Milton Keynes
- ❑ 14 Northampton
- ❑ 15 Nuneaton
- ❑ 16 Redditch
- ❑ 17 Rugby
- ❑ 18 Shirley
- ❑ 19 Solihull
- ❑ 20 Stratford-upon-Avon
- ❑ 21 Warwick Town Centre
- ❑ 22 Welltham
- ❑ 23 Other (specify) ______

Q27e. Where do you or members of your household normally go to a pub/bar/nightclub/music venue?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF 'OTHER' OR RESPONDENT STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA.

- ❑ 1 Alcester
- ❑ 2 Banbury
- ❑ 3 Birmingham - Acocks Green
- ❑ 4 Birmingham - Hall Green
- ❑ 5 Birmingham - Moseley
- ❑ 6 Birmingham - Sparkhill
- ❑ 7 Birmingham - Stirchley
- ❑ 8 Coventry
- ❑ 9 Daventry
- ❑ 10 Kenilworth Town Centre
- ❑ 11 Knowle
- ❑ 12 Leamington Spa Town Centre
- ❑ 13 Milton Keynes
- ❑ 14 Northampton
- ❑ 15 Nuneaton
- ❑ 16 Redditch
- ❑ 17 Rugby
- ❑ 18 Shirley
- ❑ 19 Solihull
- ❑ 20 Stratford-upon-Avon
- ❑ 21 Warwick Town Centre
- ❑ 22 Welltham
- ❑ 23 Other (specify) ______

Q27f. Where do you or members of your household normally go to a restaurant?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF 'OTHER' OR RESPONDENT STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA.

- ❑ 1 Alcester
- ❑ 2 Banbury
- ❑ 3 Birmingham - Acocks Green
- ❑ 4 Birmingham - Hall Green
- ❑ 5 Birmingham - Moseley
- ❑ 6 Birmingham - Sparkhill
- ❑ 7 Birmingham - Stirchley
- ❑ 8 Coventry
- ❑ 9 Daventry
- ❑ 10 Kenilworth Town Centre
- ❑ 11 Knowle
- ❑ 12 Leamington Spa Town Centre
- ❑ 13 Milton Keynes
- ❑ 14 Northampton
- ❑ 15 Nuneaton
- ❑ 16 Redditch
- ❑ 17 Rugby
- ❑ 18 Shirley
- ❑ 19 Solihull
- ❑ 20 Stratford-upon-Avon
- ❑ 21 Warwick Town Centre
- ❑ 22 Wellltham
- ❑ 23 Other (specify) __________

Q27g. Where do you or members of your household normally go tenpin bowling?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF 'OTHER' OR RESPONDENT STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA.

- ❑ 1 Hollywood Bowl, Park Way, Rubery
- ❑ 2 Tenpin Bowling, Cross Point, Business Park, Coventry
- ❑ 3 Tenpin Bowling, Leamington Spa
- ❑ 4 Other (specify) __________

Q27h. Where do you or members of your household normally go for Q27aOther?

DO NOT READ OUT. MARK ONE BOX ONLY.

IF 'OTHER' OR RESPONDENT STATES A PARTICULAR FACILITY, PLEASE SPECIFY THE FACILITY NAME, RETAIL PARK / LEISURE PARK, ROAD NAME AND AREA.

- ❑ 1 Alcester
- ❑ 2 Banbury
- ❑ 3 Birmingham - Acocks Green
- ❑ 4 Birmingham - Hall Green
- ❑ 5 Birmingham - Moseley
- ❑ 6 Birmingham - Sparkhill
- ❑ 7 Birmingham - Stirchley
- ❑ 8 Coventry
- ❑ 9 Daventry
- ❑ 10 Kenilworth Town Centre
- ❑ 11 Knowle
- ❑ 12 Leamington Spa Town Centre
- ❑ 13 Milton Keynes
- ❑ 14 Northampton
- ❑ 15 Nuneaton

- ❑ 16 Redditch
- ❑ 17 Rugby
- ❑ 18 Shirley
- ❑ 19 Solihull
- ❑ 20 Stratford-upon-Avon
- ❑ 21 Warwick Town Centre
- ❑ 22 Welltham
- ❑ 23 Other (specify) ____________

Demographics: Please READ OUT Statement:

Finally, I would like to ask you a few questions about yourself and your household. These are for survey control purposes only and the results will not be released identifying you by name.

Q28. Which of the following age bands do you fall into?

READ OUT. MARK ONE BOX ONLY.

- ❑ 1 18 - 24 years
- ❑ 2 25 - 34 years
- ❑ 3 35 - 44 years
- ❑ 4 45 - 54 years
- ❑ 5 55 - 64 years
- ❑ 6 65 years or above
- ❑ 7 Refused (DO NOT READ OUT)

Q29a. What is the occupation of the chief wage earner in your household?

IF RETIRED, ASK FOR PREVIOUS OCCUPATION
IF REFUSED, PLEASE TYPE IN 'REFUSED'

Q29b. SEG

- ❑ 1 A/B
- ❑ 2 C1
- ❑ 3 C2
- ❑ 4 D/E
- ❑ 5 Refused

Q30. How many people including yourself, live in your household, who are:

READ OUT. MARK ONE BOX ON EACH ROW.

	1 None	2 One	3 Two	4 Three	5 Four or more	6 Refused (DO NOT READ OUT)
Adults aged 16 years and over	❑	❑	❑	❑	❑	❑
Children aged 15 years and under	❑	❑	❑	❑	❑	❑

Q31. How many cars does your household own or have the use of?

DO NOT READ OUT. MARK ONE BOX ONLY.

- ❑ 1 None
- ❑ 2 One
- ❑ 3 Two
- ❑ 4 Three or more
- ❑ 5 Refused

Q32. Would you be willing to be re-contacted for future quality control purposes?

INTERVIEWER NOTE: This will involve an interviewer contacting you and asking you a few brief questions to verify and monitor the quality of this call.

- ❑ 1 Yes
- ❑ 2 No

Q33. Gender of respondent

RECORD BY OBSERVATION

- ❑ 1 Male
- ❑ 2 Female

INTERVIEWERS PLEASE READ OUT TO ALL RESPONDENTS:

Thank you for participating in this survey. If you wish to check the credentials of RMG:Clarity, I can provide the telephone number for the Market Research Society, who will be able to verify our company.
Would you like to take the number? 0500 39 69 99

Please check your work because once you move on you will not be able to return to this record.

- ❑ 1 Checking (Return to start of survey)
- ❑ 2 Continue to end of survey

If = 1, goto 'Intro'

Enter your initials to complete the survey

If true, set 'AgentName' to question 'S_Agent Name'

4

4

Convenience Goods Capacity - Market Share Analysis

TABLE 1: TOTAL FOOD SHOPPING - MARKET SHARE ANALYSIS (%)

		ZONES: 1	2	3	4	5	6	7	8	9	10	TOTAL
ROYAL LEAMINGTON SPA												
Mark and Spencer	Parade	6.0%	1.8%	0.9%	1.6%	1.3%	0.2%	0.8%	0.0%	0.0%	0.1%	**1.3%**
Tesco Metro	Parade	18.0%	3.9%	6.5%	3.4%	0.1%	0.0%	0.2%	0.0%	0.1%	0.9%	**3.5%**
Co-Op	Clemens Street	0.0%	0.3%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	**0.1%**
Co-Op	High Street	0.0%	0.5%	0.6%	3.1%	0.2%	0.0%	0.0%	0.0%	0.1%	0.0%	**0.4%**
Other Convenience Floorspace		7.2%	2.0%	7.9%	0.8%	0.7%	0.0%	0.2%	0.7%	0.4%	0.0%	**2.1%**
	SUB TOTAL:	31.3%	8.5%	16.2%	8.9%	2.4%	0.2%	1.2%	0.9%	0.6%	1.1%	**7.4%**
WARWICK												
Sainsburys	Saltisford	1.9%	22.8%	1.5%	2.1%	0.0%	0.2%	1.4%	11.3%	8.4%	0.9%	**5.3%**
Marks and Spencer	Market Street	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.8%	0.1%	0.1%	0.0%	**0.5%**
Other convenience floorspace		0.0%	5.9%	0.0%	0.4%	0.0%	0.2%	0.0%	0.7%	0.6%	0.0%	**0.8%**
	SUB TOTAL:	1.9%	32.6%	1.5%	2.4%	0.0%	0.5%	2.2%	12.2%	9.1%	0.9%	**6.7%**
KENILWORTH												
Sainsburys	Warwick Road	0.7%	0.0%	0.0%	0.0%	0.8%	2.4%	34.5%	1.0%	0.0%	0.0%	**3.5%**
Waitrose	Bertie Road	1.2%	0.7%	0.2%	0.5%	0.2%	3.3%	23.4%	3.0%	0.0%	0.1%	**3.0%**
Other convenience floorspace		0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	11.7%	0.0%	0.0%	0.6%	**1.1%**
	SUB TOTAL:	1.9%	0.7%	0.2%	0.5%	1.0%	5.8%	69.6%	4.0%	0.0%	0.7%	**7.6%**
OUT OF TOWN STORES												
Aldi	Queensway, Leamington Spa	0.0%	0.2%	3.0%	0.8%	1.6%	0.0%	1.0%	0.0%	0.1%	0.0%	**0.6%**
Asda	Chesterton Drive, Sydenham	8.7%	3.1%	38.1%	12.0%	0.1%	0.0%	1.6%	0.7%	0.3%	1.4%	**6.5%**
Lidl	Myton Road, Warwick	0.8%	5.0%	1.7%	1.1%	0.1%	0.0%	1.0%	0.0%	0.9%	0.9%	**1.2%**
Morrisons	Old Warwick Road, Leamington Spa	5.1%	4.4%	7.8%	0.8%	0.0%	0.1%	0.4%	1.0%	0.5%	0.6%	**2.1%**
Sainsburys	Leamington Shopping Park	19.7%	12.5%	18.0%	10.1%	0.1%	0.9%	1.3%	0.7%	1.8%	8.1%	**7.4%**
Sainsburys Local	Coten End, Warwick	3.0%	7.6%	0.2%	0.7%	0.0%	0.0%	0.0%	1.6%	2.7%	0.9%	**1.8%**
Tesco	Emscote Road, Warwick	16.9%	18.6%	6.3%	1.1%	0.1%	0.0%	6.3%	3.8%	3.3%	2.3%	**6.1%**
	SUB TOTAL:	54.2%	51.4%	75.1%	26.7%	2.0%	1.0%	11.7%	7.7%	9.5%	14.3%	**25.6%**
ALL OTHER STORES IN DISTRICT:		6.9%	1.8%	2.3%	0.1%	0.0%	0.2%	8.0%	0.5%	0.4%	0.4%	**2.1%**
ALL DISTRICT'S FOOD & CONVENIENCE STORES:		**96.2%**	**95.0%**	**95.3%**	**38.6%**	**5.4%**	**7.8%**	**92.7%**	**25.3%**	**19.6%**	**17.4%**	49.4%
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT												
Banbury		0.0%	0.0%	0.6%	6.5%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	**0.9%**
Birmingham		0.0%	0.7%	0.0%	0.0%	0.1%	0.0%	0.2%	4.6%	0.7%	0.1%	**0.7%**
Coventry		1.5%	1.4%	0.2%	2.3%	53.4%	89.2%	5.3%	1.1%	0.2%	1.6%	**16.5%**
Rugby		1.1%	0.4%	0.2%	5.1%	28.1%	0.6%	0.2%	0.0%	0.4%	1.1%	**3.2%**
Solihull		0.5%	0.6%	0.3%	1.0%	0.0%	0.1%	0.0%	37.3%	0.7%	0.0%	**4.2%**
Southam		0.0%	0.3%	0.7%	31.9%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	**3.1%**
Stratford-upon-Avon		0.1%	1.0%	0.1%	1.9%	0.0%	0.1%	1.3%	6.7%	73.0%	50.8%	**13.9%**
Elsewhere		0.7%	0.4%	2.5%	12.7%	12.5%	2.2%	0.3%	25.0%	5.3%	25.8%	**8.1%**
ALL OTHER STORES OUTSIDE DISTRICT:		3.8%	5.0%	4.7%	61.4%	94.6%	92.2%	7.3%	74.7%	80.4%	82.6%	**50.6%**
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

		Core East Zones 1 & 3	Core West Zone 2	Kenilworth Zone 7	North Zones 5&6	East Zones 4&10	West Zones 8&9
ROYAL LEAMINGTON SPA							
Mark and Spencer	Parade	3.7%	1.8%	0.8%	0.7%	0.9%	0.0%
Tesco Metro	Parade	12.7%	3.9%	0.2%	0.0%	2.3%	0.1%
Co-Op	Clemens Street	0.2%	0.3%	0.0%	0.0%	0.0%	0.1%
Co-Op	High Street	0.3%	0.5%	0.0%	0.1%	1.7%	0.1%
Other Convenience Floorspace		7.5%	2.0%	0.2%	0.3%	0.5%	0.6%
	SUB TOTAL:	24.4%	8.5%	1.2%	1.1%	5.3%	0.7%
WARWICK							
Sainsburys	Saltisford	1.7%	22.8%	1.4%	0.1%	1.5%	9.8%
Marks and Spencer	Market Street	0.0%	3.9%	0.8%	0.0%	0.0%	0.1%
Other convenience floorspace		0.0%	5.9%	0.0%	0.1%	0.2%	0.6%
	SUB TOTAL:	1.7%	32.6%	2.2%	0.3%	1.7%	10.5%
KENILWORTH							
Sainsburys	Warwick Road	0.4%	0.0%	34.5%	1.7%	0.0%	0.4%
Waitrose	Bertie Road	0.7%	0.7%	23.4%	2.1%	0.3%	1.4%
Other convenience floorspace		0.0%	0.0%	11.7%	0.0%	0.3%	0.0%
	SUB TOTAL:	1.1%	0.7%	69.6%	3.8%	0.6%	1.8%
OUT OF TOWN STORES							
Aldi	Queensway, Leamington Spa	1.4%	0.2%	1.0%	0.6%	0.5%	0.1%
Asda	Chesterton Drive, Sydenham	22.2%	3.1%	1.6%	0.0%	7.1%	0.5%
Lidl	Myton Road, Warwick	1.2%	5.0%	1.0%	0.0%	1.0%	0.5%
Morrisons	Old Warwick Road, Leamington Spa	6.3%	4.4%	0.4%	0.0%	0.7%	0.7%
Sainsburys	Leamington Shopping Park	18.9%	12.5%	1.3%	0.6%	9.2%	1.3%
Sainsburys Local	Coten End, Warwick	1.7%	7.6%	0.0%	0.0%	0.8%	2.2%
Tesco	Emscote Road, Warwick	12.0%	18.6%	6.3%	0.0%	1.7%	3.5%
	SUB TOTAL:	63.8%	51.4%	11.7%	1.4%	21.0%	8.7%
ALL OTHER STORES IN DISTRICT:		4.8%	1.8%	8.0%	0.1%	0.3%	0.4%
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL DISTRICT'S FOOD & CONVENIENCE STORES:		**95.8%**	**95.0%**	**92.7%**	**6.8%**	**28.9%**	**22.2%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT							
Banbury		0.3%	0.0%	0.0%	0.0%	5.0%	0.0%
Birmingham		0.0%	0.7%	0.2%	0.0%	0.1%	2.5%
Coventry		0.9%	1.4%	5.3%	74.6%	2.0%	0.6%
Rugby		0.7%	0.4%	0.2%	11.9%	3.2%	0.2%
Solihull		0.4%	0.6%	0.0%	0.0%	0.5%	17.5%
Southam		0.3%	0.3%	0.0%	0.2%	17.3%	0.1%
Stratford-upon-Avon		0.1%	1.0%	1.3%	0.0%	24.3%	42.5%
Elsewhere		1.5%	0.4%	0.3%	6.4%	18.7%	14.4%
ALL OTHER STORES OUTSIDE DISTRICT:		4.2%	5.0%	7.3%	93.2%	71.1%	77.8%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

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Convenience Goods Capacity - Market Share Analysis

TABLE 2: MAIN FOOD SHOPPING - MARKET SHARE ANALYSIS (%)

		ZONES:	1	2	3	4	5	6	7	8	9	10	TOTAL
TOTAL AVAILABLE EXPENDITURE (£m):			£66.14	£61.27	£55.82	£54.53	£48.49	£70.37	£50.39	£59.63	£70.03	£46.23	£582.90
MAIN FOOD EXPENDITURE (%):			65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%
TOTAL AVAILABLE MAIN FOOD EXPENDITURE (£m):			£42.99	£39.83	£36.29	£35.44	£31.52	£45.74	£32.75	£38.76	£45.52	£30.05	£378.88
ROYAL LEAMINGTON SPA													
Mark and Spencer	Parade		2.8%	1.0%	0.0%	1.1%	1.2%	0.0%	1.3%	0.0%	0.0%	0.0%	**0.7%**
Tesco Metro	Parade		17.6%	4.9%	5.8%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	**3.5%**
Co-Op	Clemens Street		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.0%**
Co-Op	High Street		0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.2%**
Other Convenience Floorspace			0.9%	1.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.3%**
		SUB TOTAL:	21.3%	6.9%	6.8%	6.7%	1.2%	0.0%	1.3%	0.0%	0.0%	1.4%	**4.7%**
WARWICK													
Sainsburys	Saltisford		2.8%	25.5%	1.9%	2.2%	0.0%	0.0%	1.3%	13.2%	11.0%	1.4%	**6.3%**
Marks and Spencer	Market Street		0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	**0.2%**
Other convenience floorspace			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	**0.1%**
		SUB TOTAL:	2.8%	26.5%	1.9%	2.2%	0.0%	0.0%	2.5%	14.3%	11.0%	1.4%	**6.6%**
KENILWORTH													
Sainsburys	Warwick Road		0.9%	0.0%	0.0%	0.0%	1.2%	2.8%	44.3%	1.1%	0.0%	0.0%	**4.5%**
Waitrose	Bertie Road		0.9%	1.0%	0.0%	0.0%	0.0%	2.8%	25.3%	3.3%	0.0%	0.0%	**3.1%**
Other convenience floorspace			0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	**0.1%**
		SUB TOTAL:	1.9%	1.0%	0.0%	0.0%	1.2%	5.7%	70.9%	4.4%	0.0%	0.0%	**7.7%**
OUT OF TOWN STORES													
Aldi	Queensway, Leamington Spa		0.0%	0.0%	1.9%	1.1%	2.4%	0.0%	1.3%	0.0%	0.0%	0.0%	**0.6%**
Asda	Chesterton Drive, Sydenham		12.0%	3.9%	46.6%	15.6%	0.0%	0.0%	2.5%	1.1%	0.0%	1.4%	**8.1%**
Lidl	Myton Road, Warwick		0.9%	3.9%	1.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	1.4%	**0.8%**
Morrisons	Old Warwick Road, Leamington Spa		6.5%	4.9%	9.7%	1.1%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	**2.4%**
Sainsburys	Leamington Shopping Park		25.0%	16.7%	22.3%	13.3%	0.0%	1.4%	1.3%	1.1%	2.8%	11.6%	**9.6%**
Sainsburys Local	Coten End, Warwick		2.8%	7.8%	0.0%	1.1%	0.0%	0.0%	0.0%	2.2%	3.7%	1.4%	**2.0%**
Tesco	Emscote Road, Warwick		24.1%	25.5%	7.8%	1.1%	0.0%	0.0%	8.9%	3.3%	4.6%	2.9%	**8.1%**
		SUB TOTAL:	71.3%	62.7%	89.3%	33.3%	2.4%	1.4%	15.2%	8.8%	11.0%	18.8%	**31.8%**
ALL OTHER STORES IN DISTRICT:			0.9%	0.0%	1.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	**0.4%**
ALL DISTRICT'S FOOD & CONVENIENCE STORES:			**98.1%**	**97.1%**	**99.0%**	**42.2%**	**4.8%**	**7.1%**	**92.4%**	**27.5%**	**22.0%**	**21.7%**	**51.2%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT													
Banbury			0.0%	0.0%	1.0%	8.9%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	**1.3%**
Birmingham			0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	0.9%	0.0%	**0.8%**
Coventry			0.0%	0.0%	0.0%	3.3%	60.2%	90.8%	6.3%	0.0%	0.0%	1.4%	**16.9%**
Rugby			0.9%	0.0%	0.0%	5.6%	27.7%	0.7%	0.0%	0.0%	0.0%	1.4%	**3.1%**
Solihull			0.0%	1.0%	0.0%	1.1%	0.0%	0.0%	0.0%	46.2%	0.9%	0.0%	**5.0%**
Southam			0.0%	0.0%	0.0%	30.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**2.8%**
Stratford-upon-Avon			0.0%	1.0%	0.0%	2.2%	0.0%	0.0%	1.3%	7.7%	76.1%	60.9%	**15.2%**
Elsewhere			0.9%	0.0%	0.0%	6.7%	7.2%	1.4%	0.0%	13.2%	0.0%	10.1%	**3.7%**
ALL OTHER STORES OUTSIDE DISTRICT:			1.9%	2.9%	1.0%	57.8%	95.2%	92.9%	7.6%	72.5%	78.0%	78.3%	**48.8%**
TOTAL			**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

		Core East Zones 1 & 3	Core West Zone 2	Kenilworth Zone 7	North Zones 5&6	East Zones 4&10	West Zones 8&9
ROYAL LEAMINGTON SPA							
Mark and Spencer	Parade	1.5%	1.0%	1.3%	0.5%	0.6%	0.0%
Tesco Metro	Parade	12.2%	4.9%	0.0%	0.0%	2.5%	0.0%
Co-Op	Clemens Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op	High Street	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%
Other Convenience Floorspace		0.9%	1.0%	0.0%	0.0%	0.0%	0.0%
	SUB TOTAL:	14.7%	6.9%	1.3%	0.5%	4.3%	0.0%
WARWICK							
Sainsburys	Saltisford	2.4%	25.5%	1.3%	0.0%	1.9%	12.0%
Marks and Spencer	Market Street	0.0%	1.0%	1.3%	0.0%	0.0%	0.0%
Other convenience floorspace		0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
	SUB TOTAL:	2.4%	26.5%	2.5%	0.0%	1.9%	12.5%
KENILWORTH							
Sainsburys	Warwick Road	0.5%	0.0%	44.3%	2.2%	0.0%	0.5%
Waitrose	Bertie Road	0.5%	1.0%	25.3%	1.7%	0.0%	1.5%
Other convenience floorspace		0.0%	0.0%	1.3%	0.0%	0.0%	0.0%
	SUB TOTAL:	1.0%	1.0%	70.9%	3.9%	0.0%	2.0%
OUT OF TOWN STORES							
Aldi	Queensway, Leamington Spa	0.9%	0.0%	1.3%	1.0%	0.6%	0.0%
Asda	Chesterton Drive, Sydenham	27.9%	3.9%	2.5%	0.0%	9.1%	0.5%
Lidl	Myton Road, Warwick	0.9%	3.9%	1.3%	0.0%	0.7%	0.0%
Morrisons	Old Warwick Road, Leamington Spa	8.0%	4.9%	0.0%	0.0%	0.6%	0.5%
Sainsburys	Leamington Shopping Park	23.8%	16.7%	1.3%	0.8%	12.5%	2.0%
Sainsburys Local	Coten End, Warwick	1.5%	7.8%	0.0%	0.0%	1.3%	3.0%
Tesco	Emscote Road, Warwick	16.6%	25.5%	8.9%	0.0%	1.9%	4.0%
	SUB TOTAL:	79.5%	62.7%	15.2%	1.8%	26.7%	10.0%
ALL OTHER STORES IN DISTRICT:		0.9%	0.0%	2.5%	0.0%	0.0%	0.0%
ALL DISTRICT'S FOOD & CONVENIENCE STORES:		**98.6%**	**97.1%**	**92.4%**	**6.2%**	**32.8%**	**24.5%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT							
Banbury		0.4%	0.0%	0.0%	0.0%	6.8%	0.0%
Birmingham		0.0%	1.0%	0.0%	0.0%	0.0%	3.0%
Coventry		0.0%	0.0%	6.3%	78.3%	2.5%	0.0%
Rugby		0.5%	0.0%	0.0%	11.7%	3.7%	0.0%
Solihull		0.0%	1.0%	0.0%	0.0%	0.6%	21.7%
Southam		0.0%	0.0%	0.0%	0.0%	16.2%	0.0%
Stratford-upon-Avon		0.0%	1.0%	1.3%	0.0%	29.1%	44.7%
Elsewhere		0.5%	0.0%	0.0%	3.8%	8.3%	6.1%
ALL OTHER STORES OUTSIDE DISTRICT:		1.4%	2.9%	7.6%	93.8%	67.2%	75.5%
TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

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Convenience Goods Capacity - Market Share Analysis

TABLE 3: SECONDARY MAIN FOOD SHOPPING - MARKET SHARE ANALYSIS (%)

		ZONES:	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**TOTAL**	**Core East**	**Core West**	**Kenilworth**	**North**	**East**	**West**
														Zones 1 & 3	Zone 2	Zone 7	Zones 5&6	Zones 4&10	Zones 8&9
TOTAL AVAILABLE EXPENDITURE (£m):			£66.14	£61.27	£55.82	£54.53	£48.49	£70.37	£50.39	£59.63	£70.03	£46.23	£582.90						
SECONDARY MAIN FOOD EXPENDITURE (%):			10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%						
TOTAL AVAILABLE SECONDARY EXPENDITURE (£m):			£6.61	£6.13	£5.58	£5.45	£4.85	£7.04	£5.04	£5.96	£7.00	£4.62	£58.29						
ROYAL LEAMINGTON SPA																			
Mark and Spencer	Parade		15.0%	8.2%	5.2%	5.0%	1.1%	0.0%	0.0%	0.0%	0.0%	1.5%	**3.7%**	10.5%	8.2%	0.0%	0.5%	3.4%	0.0%
Tesco Metro	Parade		9.0%	1.0%	6.3%	1.3%	1.1%	0.0%	1.6%	0.0%	1.0%	0.0%	**2.2%**	7.7%	1.0%	1.6%	0.5%	0.7%	0.5%
Co-Op	Clemens Street		0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	**0.2%**	0.5%	0.0%	0.0%	0.0%	0.0%	0.6%
Co-Op	High Street		0.0%	2.0%	2.1%	2.5%	2.3%	0.0%	0.0%	0.0%	1.0%	0.0%	**1.0%**	1.0%	2.0%	0.0%	0.9%	1.4%	0.5%
Other Convenience Floorspace			9.0%	1.0%	4.2%	1.3%	0.0%	0.0%	1.6%	0.0%	1.0%	0.0%	**1.9%**	6.8%	1.0%	1.6%	0.0%	0.7%	0.5%
		SUB TOTAL:	33.0%	12.2%	18.8%	10.0%	4.6%	0.0%	3.3%	1.3%	2.9%	1.5%	**9.0%**	26.5%	12.2%	3.3%	1.9%	6.1%	2.1%
WARWICK																			
Sainsburys	Saltisford		1.0%	18.4%	2.1%	2.5%	0.0%	0.0%	1.6%	5.1%	3.8%	0.0%	**3.6%**	1.5%	18.4%	1.6%	0.0%	1.4%	4.4%
Marks and Spencer	Market Street		0.0%	7.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	1.0%	0.0%	**1.0%**	0.0%	7.1%	0.0%	0.0%	0.0%	1.1%
Other convenience floorspace			0.0%	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.6%**	0.0%	6.1%	0.0%	0.0%	0.0%	0.0%
		SUB TOTAL:	1.0%	31.6%	2.1%	2.5%	0.0%	0.0%	1.6%	6.4%	4.8%	0.0%	**5.2%**	1.5%	31.6%	1.6%	0.0%	1.4%	5.5%
KENILWORTH																			
Sainsburys	Warwick Road		1.0%	0.0%	0.0%	0.0%	0.0%	0.8%	13.1%	2.6%	0.0%	0.0%	**1.6%**	0.5%	0.0%	13.1%	0.5%	0.0%	1.2%
Waitrose	Bertie Road		6.0%	1.0%	2.1%	1.3%	2.3%	7.4%	32.8%	5.1%	0.0%	1.5%	**5.7%**	4.2%	1.0%	32.8%	5.3%	1.4%	2.4%
Other convenience floorspace			0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	16.4%	0.0%	0.0%	1.5%	**1.6%**	0.0%	0.0%	16.4%	0.5%	0.7%	0.0%
		SUB TOTAL:	7.0%	1.0%	2.1%	1.3%	2.3%	9.0%	62.3%	7.7%	0.0%	2.9%	**8.9%**	4.7%	1.0%	62.3%	6.3%	2.0%	3.5%
OUT OF TOWN STORES																			
Aldi	Queensway, Leamington Spa		0.0%	2.0%	7.3%	1.3%	0.0%	0.0%	1.6%	0.0%	1.0%	0.0%	**1.3%**	3.3%	2.0%	1.6%	0.0%	0.7%	0.5%
Asda	Chesterton Drive, Sydenham		9.0%	2.0%	16.7%	15.0%	1.1%	0.0%	0.0%	0.0%	2.9%	4.4%	**5.0%**	12.5%	2.0%	0.0%	0.5%	10.1%	1.5%
Lidl	Myton Road, Warwick		2.0%	6.1%	7.3%	3.8%	1.1%	0.0%	1.6%	0.0%	2.9%	0.0%	**2.5%**	4.4%	6.1%	1.6%	0.5%	2.0%	1.5%
Morrisons	Old Warwick Road, Leamington Spa		3.0%	6.1%	11.5%	1.3%	0.0%	0.8%	0.0%	2.6%	4.8%	1.5%	**3.2%**	6.9%	6.1%	0.0%	0.5%	1.4%	3.8%
Sainsburys	Leamington Shopping Park		21.0%	7.1%	17.7%	11.3%	1.1%	0.0%	4.9%	0.0%	0.0%	5.9%	**6.9%**	19.5%	7.1%	4.9%	0.5%	8.8%	0.0%
Sainsburys Local	Coten End, Warwick		4.0%	3.1%	2.1%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	**1.1%**	3.1%	3.1%	0.0%	0.0%	0.0%	0.6%
Tesco	Emscote Road, Warwick		7.0%	14.3%	5.2%	3.8%	1.1%	0.0%	1.6%	9.0%	2.9%	4.4%	**5.0%**	6.2%	14.3%	1.6%	0.5%	4.1%	5.7%
		SUB TOTAL:	46.0%	40.8%	67.7%	36.3%	4.6%	0.8%	9.8%	12.8%	14.3%	16.2%	**25.0%**	55.9%	40.8%	9.8%	2.4%	27.0%	13.6%
ALL OTHER STORES IN DISTRICT:			3.0%	2.0%	0.0%	1.3%	0.0%	0.0%	3.3%	1.3%	1.0%	0.0%	**1.2%**	1.6%	2.0%	3.3%	0.0%	0.7%	1.1%
ALL DISTRICT'S FOOD & CONVENIENCE STORES:			**90.0%**	**87.8%**	**90.6%**	**51.3%**	**11.5%**	**9.8%**	**80.3%**	**29.5%**	**22.9%**	**20.6%**	49.4%	**90.3%**	**87.8%**	**80.3%**	**10.5%**	**37.2%**	**25.9%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																			
Banbury			0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	**0.6%**	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%
Birmingham			0.0%	1.0%	0.0%	0.0%	1.1%	0.0%	1.6%	2.6%	1.0%	1.5%	**0.8%**	0.0%	1.0%	1.6%	0.5%	0.7%	1.7%
Coventry			4.0%	5.1%	2.1%	1.3%	56.3%	83.6%	8.2%	3.8%	1.9%	2.9%	**17.6%**	3.1%	5.1%	8.2%	72.5%	2.0%	2.8%
Rugby			2.0%	1.0%	2.1%	7.5%	23.0%	1.6%	1.6%	0.0%	1.0%	1.5%	**3.7%**	2.0%	1.0%	1.6%	10.3%	4.7%	0.5%
Solihull			2.0%	0.0%	3.1%	2.5%	0.0%	0.8%	0.0%	32.1%	1.0%	0.0%	**4.3%**	2.5%	0.0%	0.0%	0.5%	1.4%	15.3%
Southam			0.0%	0.0%	0.0%	23.8%	1.1%	0.0%	0.0%	0.0%	1.0%	0.0%	**2.4%**	0.0%	0.0%	0.0%	0.5%	12.9%	0.5%
Stratford-upon-Avon			1.0%	4.1%	1.0%	1.3%	0.0%	0.8%	4.9%	16.7%	68.6%	55.9%	**15.7%**	1.0%	4.1%	4.9%	0.5%	26.3%	44.7%
Elsewhere			1.0%	1.0%	1.0%	8.8%	6.9%	3.3%	3.3%	15.4%	2.9%	14.7%	**5.5%**	1.0%	1.0%	3.3%	4.8%	11.5%	8.6%
ALL OTHER STORES OUTSIDE DISTRICT:			10.0%	12.2%	9.4%	48.8%	88.5%	90.2%	19.7%	70.5%	77.1%	79.4%	**50.6%**	9.7%	12.2%	19.7%	89.5%	62.8%	74.1%
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%**	**100.0%**	**100.0%**	**100.0%**

Convenience Goods Capacity - Market Share Analysis

TABLE 4: TOP-UP FOOD SHOPPING - MARKET SHARE ANALYSIS (%)

		1	2	3	4	5	6	7	8	9	10	TOTAL	Core East	Core West	Kenilworth	North	East	West
	ZONES:												Zones 1 & 3	Zone 2	Zone 7	Zones 5&6	Zones 4&10	Zones 8&9
TOTAL AVAILABLE EXPENDITURE (£m):		£66.14	£61.27	£55.82	£54.53	£48.49	£70.37	£50.39	£59.63	£70.03	£46.23	£582.90						
TOP-UP EXPENDITURE (%):		25%	25%	25%	25%	25%	25%	25%	25%	25%	25%	25%						
TOTAL AVAILABLE TOP-UP EXPENDITURE (£m):		£16.54	£15.32	£13.96	£13.63	£12.12	£17.59	£12.60	£14.91	£17.51	£11.56	£145.72						
ROYAL LEAMINGTON SPA																		
Mark and Spencer	Parade	10.9%	1.3%	1.4%	1.4%	1.5%	1.0%	0.0%	0.0%	0.0%	0.0%	**1.9%**	6.5%	1.3%	0.0%	1.2%	0.8%	0.0%
Tesco Metro	Parade	22.8%	2.5%	8.2%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**4.0%**	16.1%	2.5%	0.0%	0.0%	2.3%	0.0%
Co-Op	Clemens Street	0.0%	1.3%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.3%**	0.6%	1.3%	0.0%	0.0%	0.0%	0.0%
Co-Op	High Street	0.0%	1.3%	1.4%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.8%**	0.6%	1.3%	0.0%	0.0%	3.1%	0.0%
Other Convenience Floorspace		22.8%	5.0%	27.4%	2.9%	3.0%	0.0%	0.0%	3.0%	1.2%	0.0%	**6.7%**	24.9%	5.0%	0.0%	1.2%	1.5%	2.0%
	SUB TOTAL:	56.5%	11.3%	39.7%	14.3%	4.5%	1.0%	0.0%	3.0%	1.2%	0.0%	**13.7%**	48.8%	11.3%	0.0%	2.4%	7.7%	2.0%
WARWICK																		
Sainsburys	Saltisford	0.0%	17.5%	0.0%	1.4%	0.0%	1.0%	1.6%	9.0%	3.6%	0.0%	**3.6%**	0.0%	17.5%	1.6%	0.6%	0.8%	6.0%
Marks and Spencer	Market Street	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**1.1%**	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%
Other convenience floorspace		0.0%	21.3%	0.0%	1.4%	0.0%	1.0%	0.0%	0.0%	2.4%	0.0%	**2.8%**	0.0%	21.3%	0.0%	0.6%	0.8%	1.3%
	SUB TOTAL:	0.0%	48.8%	0.0%	2.9%	0.0%	1.9%	1.6%	9.0%	6.0%	0.0%	**7.4%**	0.0%	48.8%	1.6%	1.1%	1.5%	7.3%
KENILWORTH																		
Sainsburys	Warwick Road	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	17.7%	0.0%	0.0%	0.0%	**1.8%**	0.0%	0.0%	17.7%	1.1%	0.0%	0.0%
Waitrose	Bertie Road	0.0%	0.0%	0.0%	1.4%	0.0%	2.9%	14.5%	1.5%	0.0%	0.0%	**1.9%**	0.0%	0.0%	14.5%	1.7%	0.8%	0.7%
Other convenience floorspace		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	37.1%	0.0%	0.0%	1.6%	**3.3%**	0.0%	0.0%	37.1%	0.0%	0.7%	0.0%
	SUB TOTAL:	0.0%	0.0%	0.0%	1.4%	0.0%	4.9%	69.4%	1.5%	0.0%	1.6%	**7.0%**	0.0%	0.0%	69.4%	2.9%	1.5%	0.7%
OUT OF TOWN STORES																		
Aldi	Queensway, Leamington Spa	0.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.4%**	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda	Chesterton Drive, Sydenham	0.0%	1.3%	24.7%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**2.6%**	11.3%	1.3%	0.0%	0.0%	0.8%	0.0%
Lidl	Myton Road, Warwick	0.0%	7.5%	1.4%	2.9%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	**1.5%**	0.6%	7.5%	0.0%	0.0%	1.5%	1.3%
Morrisons	Old Warwick Road, Leamington Spa	2.2%	2.5%	1.4%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	1.6%	**0.9%**	1.8%	2.5%	1.6%	0.0%	0.7%	0.0%
Sainsburys	Leamington Shopping Park	5.4%	3.8%	6.8%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**1.8%**	6.1%	3.8%	0.0%	0.0%	0.8%	0.0%
Sainsburys Local	Coten End, Warwick	3.3%	8.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	**1.4%**	1.8%	8.8%	0.0%	0.0%	0.0%	0.6%
Tesco	Emscote Road, Warwick	2.2%	2.5%	2.7%	0.0%	0.0%	0.0%	1.6%	3.0%	0.0%	0.0%	**1.2%**	2.4%	2.5%	1.6%	0.0%	0.0%	1.4%
	SUB TOTAL:	13.0%	26.3%	41.1%	5.7%	0.0%	0.0%	3.2%	3.0%	3.6%	1.6%	**9.9%**	25.9%	26.3%	3.2%	0.0%	3.8%	3.3%
ALL OTHER STORES IN DISTRICT:		23.9%	6.3%	6.8%	0.0%	0.0%	1.0%	24.2%	1.5%	1.2%	1.6%	**6.7%**	16.1%	6.3%	24.2%	0.6%	0.7%	1.3%
ALL DISTRICT'S FOOD & CONVENIENCE STORES:		**93.5%**	**92.5%**	**87.7%**	**24.3%**	**4.5%**	**8.7%**	**98.4%**	**17.9%**	**11.9%**	**4.8%**	**44.6%**	**90.8%**	**92.5%**	**98.4%**	**7.0%**	**15.4%**	**14.7%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT																		
Banbury		0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**0.1%**	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%
Birmingham		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	**0.3%**	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Coventry		4.3%	3.8%	0.0%	0.0%	34.3%	87.4%	1.6%	3.0%	0.0%	1.6%	**14.9%**	2.4%	3.8%	1.6%	65.7%	0.7%	1.4%
Rugby		1.1%	1.3%	0.0%	2.9%	31.3%	0.0%	0.0%	0.0%	1.2%	0.0%	**3.3%**	0.6%	1.3%	0.0%	12.8%	1.5%	0.6%
Solihull		1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.4%	0.0%	0.0%	**1.8%**	0.6%	0.0%	0.0%	0.0%	0.0%	7.6%
Southam		0.0%	1.3%	2.7%	40.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	**4.3%**	1.3%	1.3%	0.0%	0.6%	21.6%	0.0%
Stratford-upon-Avon		0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	66.7%	22.6%	**9.9%**	0.0%	0.0%	0.0%	0.0%	11.1%	36.0%
Elsewhere		0.0%	1.3%	9.6%	30.0%	28.4%	3.9%	0.0%	59.7%	20.2%	71.0%	**20.9%**	4.4%	1.3%	0.0%	13.9%	48.8%	38.4%
ALL OTHER STORES OUTSIDE DISTRICT:		**6.5%**	**7.5%**	**12.3%**	**75.7%**	**95.5%**	**91.3%**	**1.6%**	**82.1%**	**88.1%**	**95.2%**	**55.4%**	9.2%	7.5%	1.6%	93.0%	84.6%	85.3%
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%**	**100.0%**	**100.0%**

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Comparison Goods Market Share Analysis

TABLE 1: ALL COMPARISON GOODS - MARKET SHARE ANALYSIS (%)

ZONES:	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 3	CORE WEST 2	KENILWORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£102.3	£95.7	£80.4	£85.9	£67.1	£103.2	£77.6	£97.6	£105.7	£73.5	£888.7						
Royal Leamington Spa Town Centre:	63.9%	40.3%	57.4%	41.6%	12.2%	6.5%	26.7%	7.6%	8.6%	13.5%	27.9%	61.0%	40.3%	26.7%	8.7%	28.6%	8.1%
Warwick Town Centre:	2.3%	15.9%	1.4%	1.6%	0.1%	0.5%	2.0%	3.1%	3.5%	0.5%	3.3%	1.9%	15.9%	2.0%	0.4%	1.1%	3.3%
Kenilworth Town Centre:	1.1%	0.7%	0.1%	0.6%	0.2%	1.5%	28.9%	0.6%	0.2%	0.3%	3.1%	0.7%	0.7%	28.9%	1.0%	0.5%	0.4%
SUB TOTAL	67.3%	56.9%	58.9%	43.8%	12.4%	8.6%	57.6%	11.3%	12.3%	14.3%	34.3%	63.6%	56.9%	57.6%	10.1%	30.2%	11.8%
Leamington Shopping Park	6.1%	5.5%	7.9%	3.7%	0.7%	0.2%	1.5%	0.9%	0.3%	0.8%	2.8%	6.9%	5.5%	1.5%	0.4%	2.4%	0.6%
Sainsbury's, Leamington Shopping Park	0.7%	0.9%	2.4%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.4%	0.5%	1.4%	0.9%	0.0%	0.0%	0.3%	0.1%
Argos, Leamington Shopping Park	0.7%	0.9%	1.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.4%	0.9%	0.9%	0.0%	0.0%	0.1%	0.2%
Morrisons, Old Warwick Road	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	1.6%	0.4%	6.8%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	1.0%	3.9%	0.4%	0.0%	0.0%	1.1%	0.0%
Currys, Tachbrook Drive, Leamington Spa	2.6%	2.7%	3.0%	1.5%	0.0%	0.2%	0.8%	0.2%	0.3%	0.2%	1.2%	2.8%	2.7%	0.8%	0.1%	0.9%	0.3%
Homebase, Myton Road	1.8%	1.5%	2.1%	0.9%	0.0%	0.2%	0.3%	0.4%	0.3%	0.2%	0.8%	1.9%	1.5%	0.3%	0.1%	0.6%	0.4%
Homebase, Emscote Road	0.9%	1.3%	0.6%	0.3%	0.0%	0.1%	0.1%	0.5%	0.2%	0.0%	0.4%	0.8%	1.3%	0.1%	0.0%	0.2%	0.3%
Tesco, Emscote Road, Warwick	0.4%	1.7%	0.6%	0.0%	0.0%	0.0%	0.5%	0.5%	0.7%	0.5%	0.5%	0.5%	1.7%	0.5%	0.0%	0.2%	0.6%
Sainsbury's, Saltisford, Warwick	0.0%	0.6%	0.0%	0.1%	0.1%	0.0%	0.0%	0.1%	0.7%	0.0%	0.2%	0.0%	0.6%	0.0%	0.0%	0.0%	0.4%
Pets at Home, Myton Road	0.2%	0.4%	0.2%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%	0.2%	0.4%	0.0%	0.0%	0.1%	0.0%
Other Edge/ Out-of-Centre	1.0%	0.6%	0.3%	0.4%	0.2%	0.0%	0.2%	0.1%	0.3%	0.0%	0.3%	0.7%	0.6%	0.2%	0.1%	0.2%	0.2%
SUB TOTAL	16.0%	16.5%	25.4%	9.2%	1.0%	0.7%	3.4%	2.8%	3.5%	2.3%	8.2%	20.1%	16.5%	3.4%	0.8%	6.0%	3.2%
Other Stores/Garden Centres - Warwick Dis	0.8%	1.8%	0.4%	0.3%	0.1%	0.2%	0.6%	0.8%	0.2%	0.2%	0.6%	0.6%	1.8%	0.6%	0.1%	0.3%	0.5%
WARWICK DISTRICT - SUB TOTAL:	84.1%	75.3%	84.7%	53.3%	13.6%	9.4%	61.6%	14.9%	16.0%	16.9%	43.0%	84.4%	75.3%	61.6%	11.0%	36.5%	15.5%
Banbury	0.0%	0.2%	1.0%	13.8%	0.5%	0.1%	0.0%	0.1%	0.4%	6.4%	2.1%	0.5%	0.2%	0.0%	0.2%	10.4%	0.3%
Birmingham	0.6%	1.8%	0.8%	0.0%	1.7%	2.8%	1.0%	4.9%	1.0%	1.3%	1.6%	0.7%	1.8%	1.0%	2.4%	0.6%	2.9%
Coventry	8.6%	7.3%	6.8%	5.6%	54.0%	77.3%	22.3%	1.8%	2.8%	1.5%	18.6%	7.8%	7.3%	22.3%	68.1%	3.7%	2.4%
Rugby	0.3%	0.0%	0.3%	7.8%	21.7%	0.0%	0.0%	0.1%	0.0%	0.0%	2.5%	0.3%	0.0%	0.0%	8.6%	4.2%	0.1%
Solihull	2.5%	5.3%	2.1%	2.5%	2.3%	5.0%	9.0%	50.6%	7.2%	2.8%	9.5%	2.4%	5.3%	9.0%	3.9%	2.6%	28.0%
Stratford-upon-Avon	1.4%	7.6%	2.1%	2.7%	0.1%	0.3%	2.6%	6.9%	64.1%	60.5%	15.1%	1.7%	7.6%	2.6%	0.2%	29.3%	36.6%
Elsewhere	2.4%	2.6%	2.2%	14.3%	6.2%	5.1%	3.5%	20.7%	8.4%	10.5%	7.7%	2.3%	2.6%	3.5%	5.5%	12.6%	14.3%
OUTSIDE WARWICK DC - SUB TOTAL	15.9%	24.7%	15.3%	46.7%	86.4%	90.6%	38.4%	85.1%	84.0%	83.1%	57.0%	15.6%	24.7%	38.4%	89.0%	63.5%	84.5%
TOTAL MARKET SHARE:	**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%**	**100.0%**	**100.0%**

TABLE 2: CLOTHING & FOOTWEAR - MARKET SHARE ANALYSIS (%)

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 3	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£29.2	£27.6	£23.6	£22.9	£18.3	£28.3	£20.9	£27.0	£28.2	£19.4	£245.4						
Royal Leamington Spa Town Centre:	74.7%	57.4%	71.4%	53.6%	23.6%	12.5%	46.5%	13.3%	12.2%	16.7%	38.6%	73.3%	57.4%	46.5%	16.9%	36.6%	12.7%
Warwick Town Centre:	1.0%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	2.0%	0.0%	1.2%	0.6%	6.4%	0.0%	0.0%	0.0%	1.6%
Kenilworth Town Centre:	1.0%	0.0%	0.0%	0.0%	0.0%	1.6%	8.5%	0.0%	0.0%	0.0%	1.0%	0.6%	0.0%	8.5%	1.0%	0.0%	0.0%
SUB TOTAL	76.8%	63.8%	71.4%	53.6%	23.6%	14.1%	54.9%	14.5%	14.3%	16.7%	40.8%	74.4%	63.8%	54.9%	17.8%	36.6%	14.4%
Leamington Shopping Park	5.1%	5.3%	5.1%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	2.3%	5.1%	5.3%	0.0%	0.0%	3.3%	0.0%
Sainsbury's, Leamington Shopping Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos, Leamington Shopping Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Old Warwick Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	1.0%	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Currys, Tachbrook Drive, Leamington Spa	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Emscote Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Emscote Road, Warwick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Saltisford, Warwick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Pets at Home, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edge/ Out-of-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%	0.0%	0.0%	0.0%
SUB TOTAL	6.1%	5.3%	9.2%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	2.8%	7.5%	5.3%	0.0%	0.0%	3.3%	0.0%
Other Stores/Garden Centres - Warwick Dis	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
WARWICK DISTRICT - SUB TOTAL:	82.8%	69.1%	80.6%	57.1%	23.6%	14.1%	54.9%	14.5%	14.3%	19.7%	43.6%	81.8%	69.1%	54.9%	17.8%	40.0%	14.4%
Banbury	0.0%	0.0%	1.0%	21.4%	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	2.7%	0.5%	0.0%	0.0%	0.0%	15.1%	0.0%
Birmingham	1.0%	1.1%	1.0%	0.0%	1.4%	6.3%	0.0%	4.8%	0.0%	3.0%	1.9%	1.0%	1.1%	0.0%	4.3%	1.4%	2.4%
Coventry	10.1%	5.3%	7.1%	2.4%	54.2%	68.8%	25.4%	0.0%	2.0%	0.0%	17.1%	8.8%	5.3%	25.4%	63.0%	1.3%	1.0%
Rugby	0.0%	0.0%	0.0%	8.3%	18.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.0%	7.1%	4.5%	0.0%
Solihull	3.0%	7.4%	3.1%	2.4%	1.4%	7.0%	12.7%	57.8%	8.2%	3.0%	11.2%	3.0%	7.4%	12.7%	4.8%	2.7%	32.4%
Stratford-upon-Avon	2.0%	16.0%	6.1%	2.4%	0.0%	0.0%	5.6%	10.8%	65.3%	62.1%	16.9%	3.9%	16.0%	5.6%	0.0%	29.8%	38.7%
Elsewhere	1.0%	1.1%	1.0%	6.0%	1.4%	3.9%	1.4%	12.0%	10.2%	4.5%	4.4%	1.0%	1.1%	1.4%	2.9%	5.3%	11.1%
OUTSIDE WARWICK DC - SUB TOTAL	17.2%	30.9%	19.4%	42.9%	76.4%	85.9%	45.1%	85.5%	85.7%	80.3%	56.4%	18.2%	30.9%	45.1%	82.2%	60.0%	85.6%
TOTAL MARKET SHARE:	**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%**	**100.0%**	**100.0%**

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Comparison Goods Market Share Analysis

TABLE 3: **DIY, GARDEN, ETC - MARKET SHARE ANALYSIS (%)**

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 3	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£7.3	£6.6	£5.6	£7.3	£5.4	£8.0	£6.4	£8.2	£9.0	£6.4	£70.4						
Royal Leamington Spa Town Centre:	19.6%	8.7%	25.7%	17.8%	1.2%	0.7%	8.9%	0.0%	4.6%	2.8%	8.6%	22.3%	8.7%	8.9%	0.9%	10.8%	2.4%
Warwick Town Centre:	1.9%	12.5%	2.9%	0.0%	0.0%	0.0%	1.3%	2.2%	0.9%	0.0%	2.1%	2.3%	12.5%	1.3%	0.0%	0.0%	1.5%
Kenilworth Town Centre:	0.9%	1.0%	0.0%	0.0%	0.0%	0.7%	29.1%	1.1%	0.0%	0.0%	3.1%	0.5%	1.0%	29.1%	0.4%	0.0%	0.5%
SUB TOTAL	22.4%	22.1%	28.6%	17.8%	1.2%	1.4%	39.2%	3.3%	5.5%	2.8%	13.7%	25.1%	22.1%	39.2%	1.3%	10.8%	4.5%
Leamington Shopping Park	2.8%	4.8%	4.8%	4.4%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	1.7%	3.7%	4.8%	1.3%	0.0%	2.4%	0.0%
Sainsbury's, Leamington Shopping Park	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos, Leamington Shopping Park	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Old Warwick Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Currys, Tachbrook Drive, Leamington Spa	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Myton Road	21.5%	18.3%	29.5%	10.0%	0.0%	0.0%	3.8%	4.4%	3.7%	2.8%	8.9%	25.0%	18.3%	3.8%	0.0%	6.6%	4.0%
Homebase, Emscote Road	12.1%	17.3%	8.6%	3.3%	0.0%	0.7%	1.3%	5.6%	0.9%	0.0%	4.9%	10.6%	17.3%	1.3%	0.4%	1.8%	3.1%
Tesco, Emscote Road, Warwick	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Saltisford, Warwick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Pets at Home, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edge/ Out-of-Centre	0.9%	4.8%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.9%	0.5%	4.8%	0.0%	0.0%	1.2%	0.5%
SUB TOTAL	39.3%	45.2%	45.7%	20.0%	0.0%	0.7%	6.3%	10.0%	5.5%	2.8%	16.8%	42.1%	45.2%	6.3%	0.4%	12.0%	7.6%
Other Stores/Garden Centres - Warwick Dis	3.7%	2.9%	1.9%	1.1%	1.2%	0.0%	1.3%	1.1%	1.8%	2.8%	1.8%	2.9%	2.9%	1.3%	0.5%	1.9%	1.5%
WARWICK DISTRICT - SUB TOTAL:	65.4%	70.2%	76.2%	38.9%	2.4%	2.2%	46.8%	14.4%	12.8%	8.3%	32.3%	70.1%	70.2%	46.8%	2.3%	24.6%	13.6%
Banbury	0.0%	0.0%	1.0%	10.0%	1.2%	0.0%	0.0%	0.0%	0.0%	5.6%	1.7%	0.4%	0.0%	0.0%	0.5%	7.9%	0.0%
Birmingham	0.0%	1.9%	1.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.9%	0.0%	0.5%	0.4%	1.9%	0.0%	0.4%	0.0%	0.5%
Coventry	15.0%	6.7%	4.8%	8.9%	61.9%	77.5%	30.4%	3.3%	2.8%	0.0%	20.6%	10.5%	6.7%	30.4%	71.2%	4.7%	3.0%
Rugby	2.8%	0.0%	2.9%	7.8%	16.7%	0.0%	0.0%	1.1%	0.0%	0.0%	2.7%	2.8%	0.0%	0.0%	6.7%	4.2%	0.5%
Solihull	0.0%	0.0%	0.0%	1.1%	2.4%	0.7%	0.0%	30.0%	0.9%	0.0%	4.0%	0.0%	0.0%	0.0%	1.4%	0.6%	14.7%
Stratford-upon-Avon	0.9%	3.8%	2.9%	0.0%	0.0%	0.0%	3.8%	4.4%	66.1%	62.5%	15.7%	1.8%	3.8%	3.8%	0.0%	29.1%	36.8%
Elsewhere	15.9%	17.3%	11.4%	33.3%	15.5%	18.8%	19.0%	46.7%	16.5%	23.6%	22.4%	13.9%	17.3%	19.0%	17.5%	28.8%	30.9%
OUTSIDE WARWICK DC - SUB TOTAL	34.6%	29.8%	23.8%	61.1%	97.6%	97.8%	53.2%	85.6%	87.2%	91.7%	67.7%	29.9%	29.8%	53.2%	97.7%	75.4%	86.4%
TOTAL MARKET SHARE:	**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%**	**100.0%**	**100.0%**

TABLE 4: **FURNITURE, CARPETS, TEXTILES, ETC - MARKET SHARE ANALYSIS (%)**

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 2	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£10.7	£10.1	£7.6	£9.7	£7.2	£11.1	£8.8	£11.0	£11.7	£8.3	£96.2						
Royal Leamington Spa Town Centre:	48.7%	32.0%	48.8%	37.5%	10.2%	6.1%	11.3%	4.9%	9.4%	12.5%	21.7%	48.7%	32.0%	11.3%	7.7%	26.0%	7.2%
Warwick Town Centre:	2.6%	9.3%	3.8%	0.0%	0.0%	0.0%	4.8%	1.6%	1.2%	2.1%	2.5%	3.1%	9.3%	4.8%	0.0%	1.0%	1.4%
Kenilworth Town Centre:	6.4%	5.3%	1.3%	3.1%	1.7%	2.6%	29.0%	1.6%	1.2%	2.1%	5.3%	4.3%	5.3%	29.0%	2.2%	2.6%	1.4%
SUB TOTAL	57.7%	46.7%	53.8%	40.6%	11.9%	8.7%	45.2%	8.2%	11.8%	16.7%	29.5%	56.0%	46.7%	45.2%	9.9%	29.6%	10.0%
Leamington Shopping Park	5.1%	1.3%	12.5%	3.1%	0.0%	0.0%	3.2%	0.0%	1.2%	0.0%	2.5%	8.2%	1.3%	3.2%	0.0%	1.7%	0.6%
Sainsbury's, Leamington Shopping Park	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos, Leamington Shopping Park	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Old Warwick Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
Currys, Tachbrook Drive, Leamington Spa	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Myton Road	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Emscote Road	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.3%	0.0%	1.3%	0.0%	0.0%	0.0%	0.6%
Tesco, Emscote Road, Warwick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Saltisford, Warwick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Pets at Home, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edge/ Out-of-Centre	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.3%	0.7%	0.0%	0.0%	0.0%	0.0%	0.6%
SUB TOTAL	10.3%	4.0%	15.0%	3.1%	0.0%	0.0%	3.2%	0.0%	3.5%	0.0%	3.8%	12.2%	4.0%	3.2%	0.0%	1.7%	1.8%
Other Stores - Warwick District	2.6%	1.3%	2.5%	1.6%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	1.0%	2.5%	1.3%	0.0%	0.0%	0.8%	0.8%
WARWICK DISTRICT - SUB TOTAL:	70.5%	52.0%	71.3%	45.3%	11.9%	8.7%	48.4%	9.8%	15.3%	16.7%	34.2%	70.8%	52.0%	48.4%	9.9%	32.1%	12.7%
Banbury	0.0%	1.3%	5.0%	15.6%	0.0%	0.9%	0.0%	0.0%	3.5%	6.3%	3.2%	2.1%	1.3%	0.0%	0.5%	11.3%	1.8%
Birmingham	1.3%	2.7%	1.3%	0.0%	1.7%	1.7%	0.0%	11.5%	1.2%	4.2%	2.7%	1.3%	2.7%	0.0%	1.7%	1.9%	6.2%
Coventry	20.5%	21.3%	13.8%	9.4%	59.3%	74.8%	24.2%	6.6%	7.1%	4.2%	23.8%	17.7%	21.3%	24.2%	68.7%	7.0%	6.8%
Rugby	1.3%	0.0%	0.0%	6.3%	15.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.7%	0.0%	0.0%	6.0%	3.4%	0.0%
Solihull	2.6%	13.3%	6.3%	3.1%	3.4%	5.2%	19.4%	45.9%	12.9%	6.3%	12.5%	4.1%	13.3%	19.4%	4.5%	4.6%	28.9%
Stratford-upon-Avon	0.0%	5.3%	0.0%	3.1%	0.0%	0.9%	3.2%	9.8%	48.2%	50.0%	12.6%	0.0%	5.3%	3.2%	0.5%	24.7%	29.7%
Elsewhere	3.8%	4.0%	2.5%	17.2%	8.5%	7.8%	4.8%	16.4%	11.8%	12.5%	9.1%	3.3%	4.0%	4.8%	8.1%	15.0%	14.0%
OUTSIDE WARWICK DC - SUB TOTAL	29.5%	48.0%	28.8%	54.7%	88.1%	91.3%	51.6%	90.2%	84.7%	83.3%	65.8%	29.2%	48.0%	51.6%	90.1%	67.9%	87.3%
TOTAL MARKET SHARE:	**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%**	**100.0%**	**100.0%**

WARWICK DISTRICT COUNCIL
RETAIL AND LEISURE STUDY UPDATE 2014

Comparison Goods Market Share Analysis

TABLE 5: **LARGE DOMESTIC APPLIANCES - MARKET SHARE ANALYSIS (%)**

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 2	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£1.9	£1.8	£1.3	£1.8	£1.5	£2.0	£2.0	£2.1	£2.4	£1.6	£18.3						
Royal Leamington Spa Town Centre:	30.1%	19.0%	38.6%	27.3%	1.4%	0.9%	22.8%	2.9%	7.2%	7.7%	14.8%	33.6%	19.0%	22.8%	1.1%	17.8%	5.2%
Warwick Town Centre:	15.1%	17.7%	6.0%	3.0%	1.4%	0.0%	1.8%	1.4%	2.4%	0.0%	4.7%	11.4%	17.7%	1.8%	0.6%	1.6%	1.9%
Kenilworth Town Centre:	2.7%	1.3%	0.0%	0.0%	0.0%	0.9%	21.1%	0.0%	2.4%	3.8%	3.4%	1.6%	1.3%	21.1%	0.5%	1.9%	1.3%
SUB TOTAL	47.9%	38.0%	44.6%	30.3%	2.9%	1.7%	45.6%	4.3%	12.0%	11.5%	23.0%	46.6%	38.0%	45.6%	2.2%	21.2%	8.4%
Leamington Shopping Park	5.5%	7.6%	13.3%	7.6%	0.0%	0.9%	0.0%	0.0%	3.6%	0.0%	3.5%	8.7%	7.6%	0.0%	0.5%	3.9%	1.9%
Sainsbury's, Leamington Shopping Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos, Leamington Shopping Park	0.0%	0.0%	3.6%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	1.5%	0.0%	0.0%	0.0%	2.4%	0.0%
Morrisons, Old Warwick Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	1.4%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Currys, Tachbrook Drive, Leamington Spa	26.0%	24.1%	24.1%	18.2%	0.0%	0.9%	7.0%	2.9%	3.6%	9.6%	10.9%	25.2%	24.1%	7.0%	0.5%	14.0%	3.3%
Homebase, Myton Road	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.5%	0.0%	1.3%	0.0%	0.0%	0.0%	1.3%
Homebase, Emscote Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Emscote Road, Warwick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.2%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%
Sainsbury's, Saltisford, Warwick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Pets at Home, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edge/ Out-of-Centre	6.8%	12.7%	4.8%	3.0%	1.4%	0.0%	7.0%	1.4%	0.0%	0.0%	3.6%	6.0%	12.7%	7.0%	0.6%	1.6%	0.7%
SUB TOTAL	39.7%	45.6%	47.0%	33.3%	1.4%	1.7%	14.0%	7.1%	7.2%	11.5%	19.5%	42.7%	45.6%	14.0%	1.6%	22.8%	7.2%
Other Stores/Garden Centres - Warwick Dis	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	1.2%	0.0%	0.7%	0.0%	2.5%	0.0%	0.0%	0.0%	2.0%
WARWICK DISTRICT - SUB TOTAL:	87.7%	86.1%	91.6%	63.6%	4.3%	3.5%	59.6%	14.3%	20.5%	23.1%	43.2%	89.3%	86.1%	59.6%	3.8%	44.0%	17.6%
Banbury	0.0%	0.0%	0.0%	13.6%	0.0%	0.0%	0.0%	0.0%	1.2%	9.6%	2.3%	0.0%	0.0%	0.0%	0.0%	11.7%	0.6%
Birmingham	0.0%	1.3%	2.4%	0.0%	0.0%	0.9%	0.0%	2.9%	2.4%	1.9%	1.2%	1.0%	1.3%	0.0%	0.5%	0.9%	2.6%
Coventry	5.5%	2.5%	3.6%	6.1%	62.9%	87.0%	24.6%	2.9%	2.4%	3.8%	19.8%	4.7%	2.5%	24.6%	76.5%	5.0%	2.6%
Rugby	0.0%	1.3%	0.0%	7.6%	25.7%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	1.3%	0.0%	11.2%	3.9%	0.0%
Solihull	5.5%	7.6%	1.2%	4.5%	5.7%	7.0%	10.5%	58.6%	9.6%	3.8%	12.6%	3.7%	7.6%	10.5%	6.4%	4.2%	32.6%
Stratford-upon-Avon	1.4%	0.0%	1.2%	0.0%	0.0%	0.9%	1.8%	1.4%	60.2%	55.8%	13.7%	1.3%	0.0%	1.8%	0.5%	26.9%	32.7%
Elsewhere	0.0%	1.3%	0.0%	4.5%	1.4%	0.9%	3.5%	20.0%	3.6%	1.9%	4.1%	0.0%	1.3%	3.5%	1.1%	3.3%	11.3%
OUTSIDE WARWICK DC - SUB TOTAL	12.3%	13.9%	8.4%	36.4%	95.7%	96.5%	40.4%	85.7%	79.5%	76.9%	56.8%	10.7%	13.9%	40.4%	96.2%	56.0%	82.4%
TOTAL MARKET SHARE:	**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%**	**100.0%**	**100.0%**

TABLE 6: **SMALL ELECTRICAL APPLIANCES - MARKET SHARE ANALYSIS (%)**

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 2	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£0.4	£0.3	£0.3	£0.4	£0.3	£0.4	£0.3	£0.4	£0.4	£0.3	£3.5						
Royal Leamington Spa Town Centre:	57.6%	31.8%	44.0%	23.1%	0.0%	1.6%	16.4%	3.7%	7.4%	7.8%	18.5%	51.7%	31.8%	16.4%	1.0%	15.9%	5.6%
Warwick Town Centre:	1.2%	11.4%	1.1%	0.0%	0.0%	0.0%	1.6%	2.5%	4.3%	0.0%	2.3%	1.1%	11.4%	1.6%	0.0%	0.0%	3.4%
Kenilworth Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	37.7%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	37.7%	0.0%	0.0%	0.0%
SUB TOTAL	58.8%	43.2%	45.1%	23.1%	0.0%	1.6%	55.7%	6.2%	11.7%	7.8%	24.5%	52.9%	43.2%	55.7%	1.0%	15.9%	9.0%
Leamington Shopping Park	3.5%	5.7%	11.0%	7.7%	0.0%	0.0%	1.6%	1.2%	2.1%	0.0%	3.1%	6.7%	5.7%	1.6%	0.0%	4.1%	1.7%
Sainsbury's, Leamington Shopping Park	7.1%	8.0%	0.0%	3.8%	0.0%	0.0%	1.6%	0.0%	1.1%	4.7%	2.6%	4.0%	8.0%	1.6%	0.0%	4.2%	0.5%
Argos, Leamington Shopping Park	4.7%	5.7%	11.0%	6.4%	0.0%	0.8%	6.6%	0.0%	0.0%	0.0%	3.2%	7.4%	5.7%	6.6%	0.5%	3.4%	0.0%
Morrisons, Old Warwick Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Asda, Chesterton Drive	4.7%	1.1%	14.3%	11.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	8.8%	1.1%	0.0%	0.0%	6.1%	0.0%
Currys, Tachbrook Drive, Leamington Spa	9.4%	11.4%	15.4%	6.4%	0.0%	0.0%	1.6%	2.5%	2.1%	1.6%	4.8%	12.0%	11.4%	1.6%	0.0%	4.1%	2.3%
Homebase, Myton Road	0.0%	0.0%	1.1%	1.3%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.3%	0.5%	0.0%	0.0%	0.5%	0.7%	0.0%
Homebase, Emscote Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Emscote Road, Warwick	2.4%	9.1%	1.1%	0.0%	1.4%	0.0%	0.0%	3.7%	0.0%	1.6%	1.9%	1.8%	9.1%	0.0%	0.5%	0.7%	1.8%
Sainsbury's, Saltisford, Warwick	1.2%	3.4%	0.0%	1.3%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.9%	0.7%	3.4%	0.0%	0.0%	0.7%	1.2%
Pets at Home, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edge/ Out-of-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%	0.0%	0.0%	0.0%
SUB TOTAL	32.9%	44.3%	53.8%	38.5%	1.4%	1.6%	11.5%	9.9%	6.4%	7.8%	19.8%	41.9%	44.3%	11.5%	1.5%	24.0%	8.1%
Other Stores - Warwick District	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.8%	0.0%	5.7%	0.0%	0.0%	0.0%	1.2%
WARWICK DISTRICT - SUB TOTAL:	91.8%	93.2%	98.9%	61.5%	1.4%	3.1%	67.2%	18.5%	18.1%	15.6%	45.1%	94.8%	93.2%	67.2%	2.4%	39.8%	18.3%
Banbury	0.0%	0.0%	1.1%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%	2.5%	0.5%	0.0%	0.0%	0.0%	12.5%	0.0%
Birmingham	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
Coventry	3.5%	0.0%	0.0%	0.0%	68.5%	91.4%	19.7%	2.5%	1.1%	0.0%	18.0%	2.0%	0.0%	19.7%	82.5%	0.0%	1.7%
Rugby	0.0%	0.0%	0.0%	9.0%	26.0%	0.8%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	10.6%	4.7%	0.0%
Solihull	4.7%	4.5%	0.0%	2.6%	2.7%	3.9%	11.5%	44.4%	5.3%	3.1%	9.3%	2.7%	4.5%	11.5%	3.5%	2.8%	24.3%
Stratford-upon-Avon	0.0%	1.1%	0.0%	1.3%	0.0%	0.0%	0.0%	7.4%	72.3%	59.4%	15.9%	0.0%	1.1%	0.0%	0.0%	28.7%	40.8%
Elsewhere	0.0%	0.0%	0.0%	9.0%	1.4%	0.8%	1.6%	27.2%	3.2%	14.1%	6.3%	0.0%	0.0%	1.6%	1.0%	11.4%	14.8%
OUTSIDE WARWICK DC - SUB TOTAL	8.2%	6.8%	1.1%	38.5%	98.6%	96.9%	32.8%	81.5%	81.9%	84.4%	54.9%	5.2%	6.8%	32.8%	97.6%	60.2%	81.7%
TOTAL MARKET SHARE:	**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%**	**100.0%**	**100.0%**

Comparison Goods Market Share Analysis

TABLE 7: RECORDING MEDIA - MARKET SHARE ANALYSIS (%)

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 2	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£2.3	£2.3	£1.7	£1.8	£1.6	£2.4	£1.6	£1.8	£2.2	£1.4	£19.1						
Royal Leamington Spa Town Centre:	80.8%	42.1%	57.8%	48.6%	15.2%	6.7%	52.0%	8.8%	15.4%	15.4%	34.6%	70.9%	42.1%	52.0%	10.0%	33.9%	12.4%
Warwick Town Centre:	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%
Kenilworth Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	16.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	16.0%	1.4%	0.0%	0.0%
SUB TOTAL	80.8%	44.7%	57.8%	48.6%	15.2%	8.9%	68.0%	8.8%	15.4%	15.4%	36.5%	70.9%	44.7%	68.0%	11.3%	33.9%	12.4%
Leamington Shopping Park	3.8%	2.6%	2.2%	8.1%	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	2.1%	3.1%	2.6%	4.0%	0.0%	4.5%	0.0%
Sainsbury's, Leamington Shopping Park	5.8%	7.9%	11.1%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%	2.9%	8.1%	7.9%	0.0%	0.0%	0.0%	1.3%
Argos, Leamington Shopping Park	1.9%	0.0%	2.2%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	2.1%	0.0%	0.0%	0.0%	1.5%	0.0%
Morrisons, Old Warwick Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	5.8%	2.6%	20.0%	10.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	11.9%	2.6%	0.0%	0.0%	6.0%	0.0%
Currys, Tachbrook Drive, Leamington Spa	0.0%	2.6%	2.2%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.8%	1.0%	2.6%	0.0%	1.4%	0.0%	0.0%
Homebase, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Emscote Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Emscote Road, Warwick	0.0%	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	7.7%	2.5%	0.0%	13.2%	0.0%	0.0%	3.4%	1.4%
Sainsbury's, Saltisford, Warwick	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.9%	0.0%	5.3%	0.0%	0.0%	0.0%	1.4%
Pets at Home, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edge/ Out-of-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%	0.0%	0.0%	0.0%
SUB TOTAL	17.3%	34.2%	37.8%	21.6%	0.0%	2.2%	4.0%	2.9%	5.1%	7.7%	13.6%	26.1%	34.2%	4.0%	1.4%	15.4%	4.1%
Other Stores - Warwick District	0.0%	2.6%	0.0%	0.0%	0.0%	2.2%	0.0%	2.9%	0.0%	0.0%	0.9%	0.0%	2.6%	0.0%	1.4%	0.0%	1.3%
WARWICK DISTRICT - SUB TOTAL:	98.1%	81.6%	95.6%	70.3%	15.2%	13.3%	72.0%	14.7%	20.5%	23.1%	51.1%	97.0%	81.6%	72.0%	14.0%	49.3%	17.9%
Banbury	0.0%	0.0%	0.0%	13.5%	0.0%	0.0%	0.0%	0.0%	0.0%	11.5%	2.1%	0.0%	0.0%	0.0%	0.0%	12.6%	0.0%
Birmingham	0.0%	5.3%	2.2%	0.0%	0.0%	2.2%	0.0%	2.9%	0.0%	0.0%	1.4%	1.0%	5.3%	0.0%	1.4%	0.0%	1.3%
Coventry	1.9%	2.6%	2.2%	2.7%	54.5%	84.4%	16.0%	0.0%	2.6%	0.0%	17.8%	2.1%	2.6%	16.0%	72.7%	1.5%	1.4%
Rugby	0.0%	0.0%	0.0%	8.1%	27.3%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	10.7%	4.5%	0.0%
Solihull	0.0%	5.3%	0.0%	2.7%	0.0%	0.0%	0.0%	47.1%	5.1%	0.0%	6.0%	0.0%	5.3%	0.0%	0.0%	1.5%	24.3%
Stratford-upon-Avon	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	8.0%	14.7%	69.2%	57.7%	14.9%	0.0%	5.3%	8.0%	0.0%	25.6%	44.4%
Elsewhere	0.0%	0.0%	0.0%	2.7%	3.0%	0.0%	4.0%	20.6%	2.6%	7.7%	3.7%	0.0%	0.0%	4.0%	1.2%	4.9%	10.8%
OUTSIDE WARWICK DC - SUB TOTAL	1.9%	18.4%	4.4%	29.7%	84.8%	86.7%	28.0%	85.3%	79.5%	76.9%	48.9%	3.0%	18.4%	28.0%	86.0%	50.7%	82.1%
TOTAL MARKET SHARE:	**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%**	**100.0%**	**100.0%**

TABLE 8: AUDIO VISUAL - MARKET SHARE ANALYSIS (%)

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 2	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£11.1	£10.2	£8.4	£7.9	£6.7	£10.9	£7.8	£8.8	£10.3	£6.9	£89.0						
Royal Leamington Spa Town Centre:	42.9%	36.2%	40.0%	32.3%	1.8%	0.0%	28.0%	7.8%	10.4%	12.8%	21.7%	41.6%	36.2%	28.0%	0.7%	23.2%	9.2%
Warwick Town Centre:	2.6%	14.5%	1.4%	4.6%	0.0%	0.0%	4.0%	3.1%	0.0%	0.0%	3.2%	2.1%	14.5%	4.0%	0.0%	2.5%	1.4%
Kenilworth Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	6.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	6.0%	1.2%	0.0%	0.0%
SUB TOTAL	45.5%	50.7%	41.4%	36.9%	1.8%	2.0%	38.0%	10.9%	10.4%	12.8%	25.6%	43.7%	50.7%	38.0%	1.9%	25.7%	10.6%
Leamington Shopping Park	7.8%	7.2%	8.6%	4.6%	0.0%	0.0%	2.0%	3.1%	1.3%	0.0%	3.7%	8.1%	7.2%	2.0%	0.0%	2.5%	2.1%
Sainsbury's, Leamington Shopping Park	0.0%	1.4%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	2.5%	1.4%	0.0%	0.0%	0.0%	0.0%
Argos, Leamington Shopping Park	3.9%	4.3%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	1.6%	3.4%	4.3%	0.0%	0.0%	0.0%	1.4%
Morrisons, Old Warwick Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	3.9%	1.4%	5.7%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	4.7%	1.4%	0.0%	0.0%	1.6%	0.0%
Currys, Tachbrook Drive, Leamington Spa	18.2%	20.3%	24.3%	12.3%	0.0%	1.0%	6.0%	1.6%	2.6%	0.0%	9.1%	20.8%	20.3%	6.0%	0.6%	6.6%	2.1%
Homebase, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Emscote Road											0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Emscote Road, Warwick	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.3%	0.0%	1.4%	0.0%	0.0%	1.0%	0.0%
Sainsbury's, Saltisford, Warwick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Pets at Home, Myton Road											0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edge/ Out-of-Centre	6.5%	0.0%	1.4%	1.5%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	4.3%	0.0%	0.0%	0.7%	0.8%	0.0%
SUB TOTAL	40.3%	36.2%	48.6%	21.5%	1.8%	1.0%	8.0%	4.7%	6.5%	2.1%	18.0%	43.8%	36.2%	8.0%	1.3%	12.5%	5.7%
Other Stores - Warwick District	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	2.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	2.0%	0.6%	0.0%	0.0%
WARWICK DISTRICT - SUB TOTAL:	85.7%	87.0%	90.0%	58.5%	3.5%	3.9%	48.0%	15.6%	16.9%	14.9%	43.9%	87.6%	87.0%	48.0%	3.8%	38.2%	16.3%
Banbury	0.0%	0.0%	1.4%	7.7%	0.0%	0.0%	0.0%	0.0%	0.0%	6.4%	1.3%	0.6%	0.0%	0.0%	0.0%	7.1%	0.0%
Birmingham	1.3%	1.4%	0.0%	0.0%	0.0%	0.0%	2.0%	4.7%	1.3%	0.0%	1.1%	0.7%	1.4%	2.0%	0.0%	0.0%	2.9%
Coventry	5.2%	4.3%	1.4%	9.2%	70.2%	89.2%	34.0%	1.6%	2.6%	6.4%	22.2%	3.6%	4.3%	34.0%	81.9%	7.9%	2.1%
Rugby	0.0%	0.0%	0.0%	12.3%	21.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%	8.1%	6.6%	0.0%
Solihull	7.8%	4.3%	5.7%	6.2%	5.3%	4.9%	16.0%	56.3%	10.4%	8.5%	12.4%	6.9%	4.3%	16.0%	5.0%	7.2%	31.6%
Stratford-upon-Avon	0.0%	1.4%	0.0%	1.5%	0.0%	0.0%	0.0%	3.1%	63.6%	59.6%	12.6%	0.0%	1.4%	0.0%	0.0%	28.5%	35.7%
Elsewhere	0.0%	1.4%	1.4%	4.6%	0.0%	2.0%	0.0%	18.8%	5.2%	4.3%	3.7%	0.6%	1.4%	0.0%	1.2%	4.4%	11.4%
OUTSIDE WARWICK DC - SUB TOTAL	14.3%	13.0%	10.0%	41.5%	96.5%	96.1%	52.0%	84.4%	83.1%	85.1%	56.1%	12.4%	13.0%	52.0%	96.2%	61.8%	83.7%
TOTAL MARKET SHARE:	**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%**	**100.0%**	**100.0%**

Comparison Goods Market Share Analysis

TABLE 9: **TOYS, HOBBIES, ETC - MARKET SHARE ANALYSIS (%)**

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 2	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£9.4	£9.6	£8.8	£8.5	£7.4	£10.2	£6.8	£8.7	£10.0	£7.0	£86.4						
Royal Leamington Spa Town Centre:	63.8%	32.7%	54.3%	47.4%	8.1%	4.1%	29.6%	4.0%	8.9%	20.6%	27.4%	59.2%	32.7%	29.6%	5.8%	35.2%	6.6%
Warwick Town Centre:	6.4%	23.1%	4.3%	2.6%	0.0%	1.4%	7.4%	6.0%	6.7%	2.9%	6.3%	5.4%	23.1%	7.4%	0.8%	2.8%	6.4%
Kenilworth Town Centre:	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	11.1%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	11.1%	0.0%	1.4%	0.0%
SUB TOTAL	70.2%	55.8%	58.7%	52.6%	8.1%	5.5%	48.1%	10.0%	15.6%	23.5%	34.9%	64.6%	55.8%	48.1%	6.6%	39.5%	13.0%
Leamington Shopping Park	4.3%	0.0%	4.3%	5.3%	0.0%	0.0%	3.7%	2.0%	0.0%	0.0%	1.9%	4.3%	0.0%	3.7%	0.0%	2.9%	0.9%
Sainsbury's, Leamington Shopping Park	2.1%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Argos, Leamington Shopping Park	2.1%	3.8%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	1.4%	3.2%	3.8%	0.0%	0.0%	0.0%	1.2%
Morrisons, Old Warwick Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	0.0%	0.0%	6.5%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	3.2%	0.0%	0.0%	0.0%	1.4%	0.0%
Currys, Tachbrook Drive, Leamington Spa	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Myton Road	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%
Homebase, Emscote Road											0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Emscote Road, Warwick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	2.2%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
Sainsbury's, Saltisford, Warwick	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Pets at Home, Myton Road											0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edge/ Out-of-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%	0.0%	0.0%	0.0%
SUB TOTAL	8.5%	5.8%	17.4%	7.9%	0.0%	0.0%	3.7%	4.0%	6.7%	0.0%	5.6%	12.8%	5.8%	3.7%	0.0%	4.3%	5.4%
Other Stores - Warwick District	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	0.0%	0.5%	0.0%	1.9%	3.7%	0.0%	0.0%	0.0%
WARWICK DISTRICT - SUB TOTAL:	78.7%	63.5%	76.1%	60.5%	8.1%	5.5%	55.6%	14.0%	22.2%	23.5%	41.0%	77.4%	63.5%	55.6%	6.6%	43.8%	18.4%
Banbury	0.0%	0.0%	0.0%	10.5%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	1.5%	0.0%	0.0%	0.0%	0.0%	8.4%	0.0%
Birmingham	0.0%	1.9%	2.2%	0.0%	0.0%	0.0%	0.0%	10.0%	2.2%	0.0%	1.7%	1.1%	1.9%	0.0%	0.0%	0.0%	5.8%
Coventry	14.9%	21.2%	21.7%	13.2%	59.5%	86.3%	40.7%	6.0%	6.7%	2.9%	27.6%	18.2%	21.2%	40.7%	75.0%	8.5%	6.4%
Rugby	0.0%	0.0%	0.0%	7.9%	24.3%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	10.2%	4.3%	0.0%
Solihull	2.1%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	2.2%	0.0%	5.7%	1.1%	1.9%	0.0%	0.0%	0.0%	24.3%
Stratford-upon-Avon	0.0%	11.5%	0.0%	5.3%	0.0%	0.0%	0.0%	4.0%	57.8%	64.7%	14.2%	0.0%	11.5%	0.0%	0.0%	32.2%	32.9%
Elsewhere	4.3%	0.0%	0.0%	2.6%	8.1%	8.2%	3.7%	16.0%	8.9%	2.9%	5.6%	2.2%	0.0%	3.7%	8.2%	2.8%	12.2%
OUTSIDE WARWICK DC - SUB TOTAL	21.3%	36.5%	23.9%	39.5%	91.9%	94.5%	44.4%	86.0%	77.8%	76.5%	59.0%	22.6%	36.5%	44.4%	93.4%	56.2%	81.6%
TOTAL MARKET SHARE:	**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%**	**100.0%**	**100.0%**

TABLE 10: **PETS AND RELATED - MARKET SHARE ANALYSIS (%)**

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 2	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£1.6	£1.5	£1.3	£1.9	£1.3	£1.8	£1.4	£2.1	£2.2	£1.7	£16.7						
Royal Leamington Spa Town Centre:	43.2%	8.9%	33.3%	13.0%	2.8%	4.3%	8.3%	2.9%	2.1%	3.8%	11.3%	38.8%	8.9%	8.3%	3.6%	8.8%	2.5%
Warwick Town Centre:	8.1%	26.7%	4.8%	4.3%	2.8%	0.0%	8.3%	20.0%	4.2%	0.0%	8.0%	6.6%	26.7%	8.3%	1.2%	2.3%	12.0%
Kenilworth Town Centre:	2.7%	2.2%	0.0%	0.0%	0.0%	0.0%	58.3%	0.0%	0.0%	0.0%	5.5%	1.5%	2.2%	58.3%	0.0%	0.0%	0.0%
SUB TOTAL	54.1%	37.8%	38.1%	17.4%	5.6%	4.3%	75.0%	22.9%	6.3%	3.8%	24.8%	46.8%	37.8%	75.0%	4.8%	11.1%	14.4%
Leamington Shopping Park	5.4%	2.2%	4.8%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	5.1%	2.2%	0.0%	0.0%	1.2%	0.0%
Sainsbury's, Leamington Shopping Park	0.0%	2.2%	7.1%	2.2%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	1.3%	3.2%	2.2%	0.0%	0.0%	1.2%	1.1%
Argos, Leamington Shopping Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Old Warwick Road	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	13.5%	0.0%	23.8%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	3.7%	18.2%	0.0%	0.0%	0.0%	3.0%	0.0%
Currys, Tachbrook Drive, Leamington Spa	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Emscote Road											0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Emscote Road, Warwick	2.7%	11.1%	2.4%	0.0%	0.0%	0.0%	8.3%	8.6%	4.2%	0.0%	3.8%	2.6%	11.1%	8.3%	0.0%	0.0%	6.3%
Sainsbury's, Saltisford, Warwick	0.0%	8.9%	0.0%	2.2%	2.8%	0.0%	0.0%	2.9%	4.2%	0.0%	2.1%	0.0%	8.9%	0.0%	1.2%	1.2%	3.5%
Pets at Home, Myton Road	13.5%	28.9%	14.3%	6.5%	2.8%	0.0%	0.0%	0.0%	4.2%	3.8%	6.8%	13.9%	28.9%	0.0%	1.2%	5.3%	2.1%
Other Edge/ Out-of-Centre	0.0%	2.2%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.1%	2.2%	0.0%	0.0%	0.0%	0.0%
SUB TOTAL	35.1%	57.8%	54.8%	15.2%	5.6%	0.0%	8.3%	11.4%	14.6%	7.7%	19.6%	44.0%	57.8%	8.3%	2.3%	11.7%	13.0%
Other Stores - Warwick District	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
WARWICK DISTRICT - SUB TOTAL:	89.2%	95.6%	92.9%	32.6%	11.1%	4.3%	83.3%	34.3%	22.9%	11.5%	44.6%	90.9%	95.6%	83.3%	7.1%	22.8%	28.5%
Banbury	0.0%	0.0%	2.4%	6.5%	0.0%	0.0%	0.0%	0.0%	0.0%	7.7%	1.7%	1.1%	0.0%	0.0%	0.0%	7.1%	0.0%
Birmingham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	2.1%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%
Coventry	0.0%	0.0%	0.0%	0.0%	44.4%	93.6%	8.3%	2.9%	0.0%	3.8%	15.1%	0.0%	0.0%	8.3%	73.1%	1.8%	1.4%
Rugby	0.0%	0.0%	0.0%	10.9%	30.6%	0.0%	0.0%	0.0%	2.1%	0.0%	3.9%	0.0%	0.0%	0.0%	12.8%	5.8%	1.1%
Solihull	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	20.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	1.2%	9.9%
Stratford-upon-Avon	0.0%	2.2%	2.4%	2.2%	0.0%	0.0%	8.3%	8.6%	70.8%	57.7%	17.3%	1.1%	2.2%	8.3%	0.0%	28.0%	40.2%
Elsewhere	10.8%	2.2%	2.4%	45.7%	13.9%	2.1%	0.0%	31.4%	2.1%	19.2%	14.0%	7.0%	2.2%	0.0%	7.0%	33.4%	16.5%
OUTSIDE WARWICK DC - SUB TOTAL	10.8%	4.4%	7.1%	67.4%	88.9%	95.7%	16.7%	65.7%	77.1%	88.5%	55.4%	9.1%	4.4%	16.7%	92.9%	77.2%	71.5%
TOTAL MARKET SHARE:	**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%**	**100.0%**	**100.0%**

WARWICK DISTRICT COUNCIL

RETAIL AND LEISURE STUDY UPDATE 2014

Comparison Goods Market Share Analysis

TABLE 11: BOOKS, STATIONARY, ETC - MARKET SHARE ANALYSIS (%)

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 2	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£4.5	£3.8	£3.5	£3.6	£2.6	£4.0	£3.1	£4.2	£4.5	£3.2	£36.9						
Royal Leamington Spa Town Centre:	85.4%	45.3%	74.6%	47.6%	13.0%	4.3%	15.7%	4.8%	8.4%	4.2%	31.4%	80.7%	45.3%	15.7%	7.7%	27.3%	6.7%
Warwick Town Centre:	1.2%	26.7%	1.5%	1.6%	0.0%	0.0%	2.0%	8.1%	8.4%	0.0%	5.3%	1.3%	26.7%	2.0%	0.0%	0.8%	8.3%
Kenilworth Town Centre:	0.0%	1.3%	0.0%	0.0%	0.0%	2.2%	76.5%	0.0%	0.0%	0.0%	6.9%	0.0%	1.3%	76.5%	1.3%	0.0%	0.0%
SUB TOTAL	86.6%	73.3%	76.1%	49.2%	13.0%	6.5%	94.1%	12.9%	16.9%	4.2%	43.5%	82.0%	73.3%	94.1%	9.1%	28.2%	15.0%
Leamington Shopping Park	1.2%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.5%	0.7%	0.0%	0.0%	0.0%	0.8%	0.8%
Sainsbury's, Leamington Shopping Park	1.2%	5.3%	4.5%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	2.6%	5.3%	0.0%	0.0%	0.8%	0.0%
Argos, Leamington Shopping Park	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Old Warwick Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	4.9%	1.3%	10.4%	9.5%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	2.8%	7.3%	1.3%	0.0%	0.7%	5.1%	0.0%
Currys, Tachbrook Drive, Leamington Spa	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Emscote Road											0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Emscote Road, Warwick	1.2%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	2.4%	2.1%	1.5%	0.7%	5.3%	0.0%	0.0%	1.0%	2.8%
Sainsbury's, Saltisford, Warwick	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	1.2%	0.0%	0.5%	0.0%	1.3%	0.0%	0.0%	0.0%	1.4%
Pets at Home, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edge/ Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	1.2%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
SUB TOTAL	8.5%	13.3%	16.4%	12.7%	0.0%	1.1%	0.0%	8.1%	4.8%	2.1%	7.0%	12.0%	13.3%	0.0%	0.7%	7.7%	6.4%
Other Stores - Warwick District	1.2%	1.3%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.7%	1.3%	0.0%	0.0%	0.8%	0.0%
WARWICK DISTRICT - SUB TOTAL:	96.3%	88.0%	92.5%	63.5%	13.0%	7.6%	94.1%	21.0%	21.7%	6.3%	51.0%	94.7%	88.0%	94.1%	9.7%	36.8%	21.3%
Banbury	0.0%	1.3%	0.0%	9.5%	0.0%	0.0%	0.0%	1.6%	0.0%	6.3%	1.8%	0.0%	1.3%	0.0%	0.0%	8.0%	0.8%
Birmingham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	1.2%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
Coventry	3.7%	1.3%	3.0%	3.2%	45.7%	90.2%	2.0%	0.0%	0.0%	0.0%	14.3%	3.4%	1.3%	2.0%	72.8%	1.7%	0.0%
Rugby	0.0%	0.0%	1.5%	1.6%	34.8%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.7%	0.0%	0.0%	13.6%	0.8%	0.0%
Solihull	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	45.2%	1.2%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	22.4%
Stratford-upon-Avon	0.0%	5.3%	0.0%	0.0%	2.2%	0.0%	0.0%	12.9%	74.7%	81.3%	18.2%	0.0%	5.3%	0.0%	0.8%	37.9%	44.9%
Elsewhere	0.0%	4.0%	3.0%	22.2%	4.3%	2.2%	3.9%	17.7%	1.2%	6.3%	6.4%	1.3%	4.0%	3.9%	3.0%	14.8%	9.2%
OUTSIDE WARWICK DC - SUB TOTAL	3.7%	12.0%	7.5%	36.5%	87.0%	92.4%	5.9%	79.0%	78.3%	93.8%	49.0%	5.3%	12.0%	5.9%	90.3%	63.2%	78.7%
TOTAL MARKET SHARE:	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%	100.0%	100.0%

TABLE 12: PERSONAL, LUXURY GOODS, GIFTS, ETC - MARKET SHARE ANALYSIS (%)

	1	2	3	4	5	6	7	8	9	10	TOTAL	CORE EAST 1 & 2	CORE WEST 2	K'WORTH 7	NORTH 5 & 6	EAST ZONE 4 & 10	WEST ZONE 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£24.0	£22.1	£18.2	£20.2	£14.9	£24.1	£18.4	£23.3	£24.6	£17.3	£206.8						
Royal Leamington Spa Town Centre:	79.1%	40.0%	62.0%	42.5%	11.5%	6.7%	17.7%	7.6%	4.7%	14.8%	28.9%	71.8%	40.0%	17.7%	8.5%	29.7%	6.1%
Warwick Town Centre:	1.1%	28.2%	0.0%	2.7%	0.0%	1.7%	0.0%	3.0%	7.1%	0.0%	4.8%	0.6%	28.2%	0.0%	1.0%	1.5%	5.1%
Kenilworth Town Centre:	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	59.7%	1.5%	0.0%	0.0%	5.7%	0.0%	0.0%	59.7%	1.0%	0.0%	0.7%
SUB TOTAL	80.2%	68.2%	62.0%	45.2%	11.5%	10.0%	77.4%	12.1%	11.8%	14.8%	39.3%	72.4%	68.2%	77.4%	10.6%	31.2%	11.9%
Leamington Shopping Park	9.9%	10.6%	13.9%	2.7%	3.3%	0.8%	1.6%	1.5%	0.0%	0.0%	4.4%	11.6%	10.6%	1.6%	1.8%	1.5%	0.7%
Sainsbury's, Leamington Shopping Park	1.1%	1.2%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.7%	2.3%	1.2%	0.0%	0.0%	0.8%	0.0%
Argos, Leamington Shopping Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons, Old Warwick Road	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	1.1%	0.0%	12.7%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	6.1%	0.0%	0.0%	0.0%	1.5%	0.0%
Currys, Tachbrook Drive, Leamington Spa	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Homebase, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%
Homebase, Emscote Road											0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Emscote Road, Warwick	1.1%	3.5%	2.5%	0.0%	0.0%	0.0%	1.6%	0.0%	1.2%	0.0%	1.0%	1.7%	3.5%	1.6%	0.0%	0.0%	0.6%
Sainsbury's, Saltisford, Warwick	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.3%	0.0%	1.2%	0.0%	0.0%	0.0%	0.6%
Pets at Home, Myton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Edge/ Out-of-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%	0.0%	0.0%	0.0%
SUB TOTAL	13.2%	16.5%	34.2%	5.5%	3.3%	1.7%	3.2%	1.5%	2.4%	1.6%	8.1%	22.2%	16.5%	3.2%	2.3%	3.7%	1.9%
Other Stores - Warwick District	1.1%	4.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.8%	0.6%	4.7%	0.0%	0.0%	0.0%	0.7%
WARWICK DISTRICT - SUB TOTAL:	94.5%	89.4%	96.2%	50.7%	14.8%	11.7%	80.6%	15.2%	14.1%	16.4%	48.2%	95.2%	89.4%	80.6%	12.8%	34.9%	14.6%
Banbury	0.0%	0.0%	0.0%	11.0%	1.6%	0.0%	0.0%	0.0%	0.0%	4.9%	1.6%	0.0%	0.0%	0.0%	0.6%	8.2%	0.0%
Birmingham	0.0%	2.4%	0.0%	0.0%	4.9%	3.3%	3.2%	3.0%	1.2%	0.0%	1.8%	0.0%	2.4%	3.2%	3.9%	0.0%	2.1%
Coventry	1.1%	1.2%	1.3%	2.7%	39.3%	74.2%	8.1%	0.0%	1.2%	0.0%	13.0%	1.2%	1.2%	8.1%	60.9%	1.5%	0.6%
Rugby	0.0%	0.0%	0.0%	6.8%	26.2%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	10.0%	3.7%	0.0%
Solihull	1.1%	3.5%	0.0%	2.7%	3.3%	7.5%	6.5%	53.0%	8.2%	1.6%	9.5%	0.6%	3.5%	6.5%	5.9%	2.2%	30.0%
Stratford-upon-Avon	3.3%	2.4%	0.0%	4.1%	0.0%	0.8%	0.0%	3.0%	69.4%	59.0%	14.7%	1.9%	2.4%	0.0%	0.5%	29.4%	37.1%
Elsewhere	0.0%	1.2%	2.5%	21.9%	9.8%	2.5%	1.6%	25.8%	5.9%	18.0%	8.7%	1.1%	1.2%	1.6%	5.3%	20.1%	15.5%
OUTSIDE WARWICK DC - SUB TOTAL	5.5%	10.6%	3.8%	49.3%	85.2%	88.3%	19.4%	84.8%	85.9%	83.6%	51.8%	4.8%	10.6%	19.4%	87.2%	65.1%	85.4%
TOTAL MARKET SHARE:	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%	100.0%	100.0%

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APPENDIX 1 – FOOTFALL COUNT DATA

	LEAMINGTON SPA		1999		2000		2001		2002		2003		2004		2005		2006	
	Occupier	Street & Address	Count Week	Index	Count Week	Index	Count Week	Index	Count Week	Index	Count Week	Index	Count Week	Index	Count Week	Index	Count Week	Index
1	Brian Holt Estate	10 Euston Place	9.04	32	9.81	35	6.78	24	7.69	28	6.78	24	5.58	20	6	22	6.35	24
2	Vacant	Regency Arcade	33.6	119	28.52	101	21.74	76	17.29	63	24.28	87	20.05	71	20.12	75	19.91	75
3	Pizza Hut	140 Parade	44.4	157	29.37	104	29.22	103	26.68	97	26.12	94	28.02	100	27.32	102	25.91	97
4	Town Hall	Parade	14.33	51	20.54	73	21.25	75	20.19	73	17.72	64	16.31	58	17.51	65	25.69	96
5	Starbucks	Regent Court	not used		not used		not used		not used		not used		not used		not used		15.39	58
6	Vacant	104 Parade	45.58	163	43.55	154	41.58	146	41.79	151	43.34	156	48.92	174	35.86	134	33.04	124
7	Wesley Barrell	52 Regent Street	13.2	47	11.22	40	11.51	40	10.66	39	9.74	35	8.26	29	8.47	32	8.19	31
8	Three Cooks	71 Regent Street	20.75	74	18.42	65	20.89	73	23.51	85	21.18	76	18.64	66	24.14	90	27.67	104
9	Phase Eight	84 Regent Street	11.79	42	9.88	35	7.98	28	7.98	29	8.47	30	10.66	38	9.18	34	17.01	64
10	Noa Noa	117 Regent Street	14.47	51	15.88	56	13.27	47	15.6	57	15.39	55	14.75	52	14.82	55	15.74	59
11	vACANT	15-17 Park Street	4.38	16	6.71	24	6.42	23	5.79	21	5.08	18	4.59	16	5.72	21	5.58	21
12	Aubrey Allen Butcher	108 Warwick Street	16.8	60	14.82	52	12.28	43	11.22	41	11.58	42	12.49	44	11.86	44	13.69	51
13	Parkes Menswear	83 Warwick Street	17.79	63	12.85	45	12.85	45	13.91	50	12.07	43	11.08	39	10.59	40	11.08	42
	n/a	Royal Priors L/M	15.32	54	32.54	115	discontinued count point		discontinued count point		discontinued count point		discontinued count point		discontinued count point		discontinued count point	
14	Animal Clothing	L16 Royal Priors	21.11	75	37.91	134	48.14	169	42.14	153	56.68	204	64.73	230	62.75	235	59.79	224
15	Julian Graves	L3 Royal Priors	31.27	111	31.06	110	30.42	107	51.32	186	30.42	110	34.17	121	30.92	116	29.58	111
16	Marks & Spencer	U10 Royal Priors	29.93	106	27.81	98	31.55	111	32.97	119	24.85	89	28.66	102	29.58	111	27.95	105
17	Planet Clothing	U18 Royal Priors	56.73	208	48.07	170	42.64	150	24.41	92	44.54	160	46.31	164	41.37	155	39.53	148
18	Top Shop	U4 Royal Priors	49.27	175	52.94	187	58.38	205	43.06	156	54	194	65.86	234	58.02	217	55.48	208
19	Tie Rack	28 Royal Priors	not used		not used		49.41	174	49.48	179	36.99	133	37.13	132	34.59	129	35.65	134
20	Jade Shoes	70 Warwick Street	34.59	123	36	127	26.05	91	29.51	107	32.47	117	31.55	112	30.28	113	27.67	104
21	Wallis (vacant)	41 Parade	41.22	146	44.82	158	44.54	156	43.2	156	40.31	145	38.26	136	38.9	145	39.53	148
22	Santander Bank	63 Parade	44.12	156	41.93	148	44.26	155	39.18	142	36.57	132	33.25	118	36.35	136	37.62	141
23	Lloyds TSB	73 Parade	27.67	98	26.97	95	21.39	75	28.87	105	25.69	92	24.78	88	23.37	87	25.84	97
24	Marks & Spencer	70 Parade	61.13	217	60	212	61.77	217	57.25	207	54.71	197	56.82	202	54.57	204	51.67	194
25	Next	44 Parade	49.27	175	55.2	195	55.77	196	51.81	188	52.87	190	51.32	182	48.5	181	49.77	187
26	Co-Op	52 to 60 Warwick St	15.6	55	12.78	45	11.08	39	12.71	46	15.11	54	16.94	60	16.17	60	14.47	54
27	The Little Gift Shop	40a Warwick Street	11.65	41	8.26	29	5.65	20	7.41	27	8.19	29	7.84	28	7.76	29	6.71	25
28	Yorkshire Bank	47 Warwick Street	20.19	72	19.62	69	24.07	85	21.04	76	22.52	81	19.62	70	19.48	73	20.47	77
29	Boots	31 Parade	37.98	135	50.19	177	46.02	162	45.46	165	41.37	149	38.26	136	32.05	120	30.57	115
30	Tesco Metro	22 Parade	41.51	147	33.32	118	37.13	130	36.07	131	46.52	167	43.41	154	38.19	143	38.54	145
31	Wildes Wine Bar	7 Parade	9.81	35	8.68	31	10.09	35	9.11	33	7.84	28	6.64	24	7.55	28	10.66	40
	Average		**28.23**	**100**	**28.32**	**100**	**28.47**	**100**	**27.61**	**100**	**27.78**	**100**	**28.16**	**100**	**26.73**	**100**	**26.67**	**100**
	PERCENTAGE DIFFERENCE ON PREVIOUS YEAR				**0.32**		**0.53**		**-3.02**		**0.62**		**1.37**		**-5.08**		**-0.22**	
	Old Town		1999		2000		2001		2002		2003		2004		2005		2006	
	Occupier	**Street & Address**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**
1	Robin's Well P/H	2 Victoria Terrrace	17.3	168	10.69	110	10.38	107	12.42	123	14.37	144	12.74	139	11.65	114	13.94	126
2	Post Office	Victoria Terrace	9.1	89	13.77	142	14.12	145	17.05	169	14.33	143	13.06	142	14.89	146	14.01	126
3	Tile-Tastic Tiles 9vaca	4 Spencer Street	7.8	76	5.44	56	5.58	57	6.14	61	5.22	52	5.4	59	7.09	69	5.93	53
4	Jug & Jester P/H	11-13 Bath Street	13.1	127	13.48	139	13.87	142	14.37	142	14.61	146	13.52	147	14.08	138	16.24	146
5	Iceland	52-56 Bath Street	12.7	124	12.64	130	12.18	125	13.45	133	12.32	123	12.04	131	12.95	127	14.61	132
6	Bridges Supermarket	12 High Street	4.3	42	6.53	67	7.31	75	4.59	45	5.22	52	5.33	58	6.99	68	6.25	56
7	K L Oriental Supermark	23 High Street	8	78	6.46	67	9.07	93	7.02	70	7.59	76	6.07	66	8.51	83	7.62	69
8	Age Concern Informati	8 Clemens Street	9.9	96	10.45	108	10.24	105	9.85	98	8.93	89	7.52	82	10.31	101	12	108
9	Co-op Supermarket	34 Clemens Street	16.4	159	13.2	136	10.73	110	11.61	115	13.31	133	12.18	133	11.75	115	12.42	112
10	Ladbrokes	41 High Street	4.2	41	4.2	43	3.95	41	4.38	43	4.02	40	3.92	43	3.99	39	3.78	34
11	Royal Pump Room Mus	Victoria Bridge	not used		not used		not used		not used		not used		not used		not used		15.14	137
	Average		**10.3**	**100**	**9.68**	**100**	**9.74**	**100**	**10.09**	**100**	**9.99**	**100**	**9.18**	**100**	**10.22**	**100**	**11.09**	**100**
	PERCENTAGE DIFFERENCE ON PREVIOUS YEAR				**-6.02**		**0.62**		**3.59**		**-0.99**		**-8.11**		**11.34**		**8.50**	
	TOTAL AVERAGE		**38.53**		**38.00**		**38.21**		**37.70**		**37.77**		**37.34**		**36.95**		**37.76**	
	date of count		**16th&17thJuly**		**14th&15th July**		**13th &14th July**		**12th&13thJuly**		**11th & 12th July**		**2nd & 3rd July**		**1st & 2nd July**		**14th & 15th July**	
	weather - Friday		warm and sunny		cold and overcast		sunny and occasional showers		warm & sunny with showe		hot and sunny		mild & sunny with Showers		warm and sunny		hot and sunny	
	weather - Saturday		warm and sunny		warm and sunny		sunny and occasional showers		dry, warm and sunny		hot and sunny		mild & breezy with Showers		warm and sunny		hot and sunny	

FORMULA FOR CALCULATING PERCENTAGE DIFFERENCE ON PREVIOUS YEAR:
New figure - old figure / old figure * 100.

COUNT SHOWN IN THOUSANDS

	LEAMINGTON SPA		2007		2008		2009		2010		2011		2012	
	Occupier	**Street & Address**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count**	**Index**
1	Brian Holt Estate	10 Euston Place	5.79	23	7.62	31	6.07	27	5.22	21	4.59	18	5.36	21
2	Vacant	Regency Arcade	18.21	72	16.59	67	12.92	58	16.38	67	17.44	69	18.21	70
3	Pizza Hut	140 Parade	23.01	91	21.95	88	17.72	79	22.02	90	23.01	91	25.2	97
4	Town Hall	Parade	23.29	92	20.33	82	18.71	84	23.01	94	20.4	81	23.86	91
5	Starbucks	Regent Court	14.61	58	14.47	58	10.73	48	13.69	56	20.33	80	23.51	90
6	Vacant	104 Parade	33.46	132	30.64	123	27.46	123	31.91	130	33.67	133	36.21	139
7	Wesley Barrell	52 Regent Street	7.48	30	7.69	31	7.13	32	9.6	39	10.73	42	12.64	48
8	Three Cooks	71 Regent Street	21.39	84	20.47	82	16.87	75	18	73	18.71	74	18.92	73
9	Phase Eight	84 Regent Street	16.31	64	16.87	68	15.95	71	16.09	65	17.65	70	19.84	76
10	Noa Noa	117 Regent Street	14.47	57	13.84	56	13.41	60	13.06	53	15.11	60	14.68	56
11	vACANT	15-17 Park Street	6.56	26	5.15	21	5.51	25	5.86	24	7.48	30	7.06	27
12	Aubrey Allen Butcher	108 Warwick Street	13.27	52	11.65	47	10.66	48	11.72	48	13.69	54	13.98	54
13	Parkes Menswear	83 Warwick Street	10.87	43	9.95	40	10.59	47	10.24	42	12.21	48	14.4	55
	n/a	Royal Priors L/M	discontinued count point		discontinued count point		discontinued count point		discontinued count point					
14	Animal Clothing	L16 Royal Priors	54.78	216	56.75	228	52.59	235	58.1	236	52.87	209	49.34	189
15	Julian Graves	L3 Royal Priors	28.87	114	27.32	110	26.61	119	30.57	124	28.38	112	31.27	120
16	Marks & Spencer	U10 Royal Priors	24.35	96	24.78	99	21.6	96	24.78	101	26.75	106	25.55	98
17	Planet Clothing	U18 Royal Priors	37.98	150	35.37	142	33.95	152	36.64	149	34.31	136	35.01	134
18	Top Shop	U4 Royal Priors	51.88	205	52.38	210	47.65	213	52.17	212	51.11	202	53.65	206
19	Tie Rack	28 Royal Priors	32.12	127	33.53	135	31.69	141	32.82	133	34.87	138	31.13	119
20	Jade Shoes	70 Warwick Street	28.38	112	26.19	105	24.85	111	25.77	105	24.64	97	24.49	94
21	Wallis (vacant)	41 Parade	37.48	148	35.72	143	32.33	144	35.65	145	40.24	159	37.13	142
22	Santander Bank	63 Parade	35.44	140	36.92	148	31.06	139	33.53	136	37.13	147	38.9	149
23	Lloyds TSB	73 Parade	23.37	92	23.01	92	20.4	91	21.18	86	22.02	87	21.95	84
24	Marks & Spencer	70 Parade	50.82	201	51.46	207	46.66	208	48.64	198	49.2	194	50.05	192
25	Next	44 Parade	49.27	194	47.86	192	42.14	188	48	195	48	190	50.54	194
26	Co-Op	52 to 60 Warwick St	13.55	54	14.19	57	12.35	55	13.84	56	14.4	57	15395	61
27	The Little Gift Shop	40a Warwick Street	6.14	24	6.78	27	5.65	25	6.35	26	6.07	24	6.35	24
28	Yorkshire Bank	47 Warwick Street	18.64	74	17.37	70	15.04	67	17.37	71	17.01	67	19.27	74
29	Boots	31 Parade	35.08	138	34.52	139	31.84	142	33.95	138	32.47	128	32.97	126
30	Tesco Metro	22 Parade	39.18	155	40.94	164	35.15	157	35.86	146	36.92	146	39.39	151
31	Wildes Wine Bar	7 Parade	9.25	37	9.88	40	9.11	41	10.59	43	12.78	51	11.86	45
	Average		**25.33**	**100**	**24.91**	**100**	**22.4**	**100**	**24.6**	**100**	**25.3**	**100**	**26.09**	**100**
	PERCENTAGE DIFFERENCE ON PREVIOUS Y		**-5.02**		**-1.66**		**-10.08**		**9.82**		**2.85**		**3.03**	

	Old Town		2007		2008		2009		2010		2011		2012	
	Occupier	**Street & Address**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count Week**	**Index**	**Count**	**Index**
1	Robin's Well P/H	2 Victoria Terrrace	12.21	114	14.29	138	13.31	140	14.54	140	13.91	136	14.33	123
2	Post Office	Victoria Terrace	13.34	124	13.20	127	11.58	122	12	115	11.36	111	11.75	101
3	Tile-Tastic Tiles 9vaca	4 Spencer Street	5.36	50	5.68	55	4.94	52	5.68	55	5.93	58	5.58	48
4	Jug & Jester P/H	11-13 Bath Street	16.09	150	15.64	151	14.01	147	14.86	143	15.11	147	16.13	138
5	Iceland	52-56 Bath Street	14.44	134	12.78	123	11.65	122	12.92	124	13.87	135	14.01	120
6	Bridges Supermarket	12 High Street	7.16	67	8.19	79	6.74	71	7.09	68	7.09	69	7.52	65
7	K L Oriental Supermark	23 High Street	7.41	69	6.21	60	4.66	49	5.89	57	7.38	72	9.35	80
8	Age Concern Informati	8 Clemens Street	10.98	102	10.80	104	11.05	116	11.61	112	10.66	104	11.12	95
9	Co-op Supermarket	34 Clemens Street	12.67	118	9.74	94	9.56	101	10.87	105	9.49	93	11.79	101
10	Ladbrokes	41 High Street	3.11	29	2.82	27	2.12	22	2.79	27	3.21	31	3.74	32
11	Royal Pump Room Mus	Victoria Bridge	15.28	142	14.61	141	15	158	16.06	155	14.75	144	22.87	196
	Average		**10.73**	**100**	**10.36**	**100**	**9.51**	**100**	**10.39**	**100**	**10.25**	**100**	**11.65**	**100**
	PERCENTAGE DIFFERENCE ON PREVIOUS Y		**-3.25**		**-3.45**		**-8.20**		**9.25**		**-1.35**		**13.66**	
	TOTAL AVERAGE		**36.06**		**35.27**		**31.91**		**34.99**		**35.55**		**37.74**	

	2007	2008	2009	2010
date of count	**6th & 7th July**	**4th & 5th July**	**10th & 11th July**	**24th & 25th Sept**
weather - Friday	mild with sunny spells	mild with sunny spells	Warm with bright spells	Cold, breezy & overcast
weather - Saturday	warm and sunny	warm and bright	Warm with drizzle, becomir	Breezy & bright

FORMULA FOR CALCULATING PERCENTAGE DIFFERENCE ON PREVIOUS YEAR:
New figure - old figure / old figure * 100.

COUNT SHOWN IN THOUSANDS

KENILWORTH

	1999		2000		2001		2002		2003		2004		2005	
Street & Address	**Count Week**	**Index**	**Count Week**	**Index**	**Count**	**Index**	**Count**	**Index**	**Count**	**Index**	**Count**	**Index**	**Count**	**Index**
47 Abbey End	11.58	96	8.58	81	7.41	85	7.66	83	6.92	79	6.07	80	7.41	91
1 Abbey End	13.69	113	8.89	83	9.18	105	9.67	105	8.68	99	7.76	102	8.26	101
27 The Square	14.08	116	12.21	115	10.45	119	10.41	113	9.92	113	9.39	123	10.98	135
Station Road	11.54	95	8.15	77	6.28	72	6.11	66	5.79	66	6.04	79	3.67	45
6 millar court														
1-2 Warw ick House	6.64	55	4.06	38	3.14	36	3.56	39	3.18	36	3.04	40	2.93	36
11 Talisman Square	15.57	128	12.95	122	10.2	117	12.81	139	11.72	134	10.2	134	8.08	99
Talisman Square	10.02	83	7.02	66	7.2	82	7.52	82	7.38	84	6.78	89	7.34	90
2 Talisman Square	18.6	153	14.97	140	11.36	130	13.09	143	11.44	131	9.49	125	12	147
7 Warw ick Road	17.26	142	13.52	127	10.69	122	12.92	141	12.71	145	9.49	125	10.87	133
15 Warw ick Road	16.06	133	15.6	146	13.27	152	12.74	139	11.44	131	9.85	129	9.81	120
17 Warw ick Road	23.4	193	26.89	252	22.13	253	21.64	236	20.75	237	18.53	243	17.72	217
w alkw ay off w arw ick road														
49 Warw ick Road	6.32	52	5.19	49	4.62	53	4.31	47	5.05	58	4.13	54	5.79	71
93 Warw ick Road	3.88	32	3	28	2.33	27	1.76	19	2.51	29	2.36	31	2.47	30
74 Warw ick Road	4.09	34	3.32	31	3.07	35	3.67	40	3.32	38	3.11	41	2.72	33
Warw ick Road	9.95	82	7.8	73	5.15	59	4.52	49	3.95	45	3.53	46	4.59	56
46-48 Warw ick Road	9.56	79	10.41	98	9.64	110	9.78	106	10.66	122	9.21	121	9.07	111
18-20 Warw ick Road	14.19	117	14.37	135	10.45	119	12.49	136	11.58	132	8.79	115	11.58	142
8 Warw ick Road	13.73	113	14.89	140	11.26	129	12.46	136	13.09	149	11.22	147	14.29	175
The Square	14.65	121	15.71	147	12.85	147	11.61	126	11.29	129	10.38	136	11.29	138
59 Abbey End	7.55	62	5.54	52	4.41	50	4.98	54	3.88	44	3.04	40	2.33	29
Smalley Place														
Total	**12.12**	**100**	**10.65**	**100**	**8.75**	**100**	**9.19**	**100**	**8.76**	**100**	**7.62**	**100**	**8.16**	**100**
	18th & 19th June		**16th & 17th June**		**15th & 16th June**		**21st & 22nd June**		**27th & 28th June**		**25th & 26th June**		**15th 16th July**	
	Warm & Sunny		Warm & Sunny		Fair w ith Thunderstorms		Fine and Dry		Warm & overcast w ith show ers		Warm & Sunny		mild and sunny	
	Overcast w ith light show ers		Very Hot & Sunny		Mild w ith Show ers		Fine and Dry		hot & sunny		Rain, occassionally heavy		mild and sunny	

KENILWORTH

Street & Address	2006 Count	2006 Index	2007 Count	2007 Index	2008 Count	2008 Index	2009 count	2009 Index	2010 Count	2010 Index	2011 Count	2011 Index	2012 Count	2012 Index
47 Abbey End	7.27	96	5.47	85	6.56	88	6.39	82	6.49	82	7.52	82	7.87	84
1 Abbey End	8.01	106	7.62	119	10.45	139	11.29	146	12.39	157	12.04	131	12.25	131
27 The Square	10.06	133	8.44	132	10.24	136	10.13	131	10.31	131	11.22	122	12.6	134
Station Road	2.26	30	1.52	24	2.4	32	4.31	56	3.07	39	4.31	47	4.94	53
6 millar court					0.99	13	3.11	40	1.55	20	1.66	18	1.41	15
1-2 Warwick House	3.07	41	2.4	37	2.58	34	2.36	31	1.34	17	2.4	26	2.58	27
11 Talisman Square	7.59	101	5.86	92	8.58	114	8.22	106	6.25	79	8.89	97	9.25	99
Talisman Square	6.42	85	5.29	83	8.89	119	10.31	133	11.19	142	13.31	145	14.15	151
2 Talisman Square	11.54	153	9.14	143	17.47	233	19.17	247	21.11	268	23.79	259	24.53	262
7 Warwick Road	11.19	148	10.16	159	10.62	142	9.74	126	11.86	151	12.35	134	13.62	145
15 Warwick Road	9.07	120	9.32	146	*	*								
17 Warwick Road	17.37	230	15.67	245	16.69	223	15.95	206	15.07	191	16.2	176	13.62	190
walkway off warwick road					1.8	24	1.45	19	1.09	14	10.48	114	9.28	99
49 Warwick Road	5.01	66	4.06	63	4.84	64	4.73	61	5.01	64	5.72	62	5.26	56
93 Warwick Road	2.22	29	1.66	26	2.36	32	1.76	23	2.08	26	2.26	25	2.19	23
74 Warwick Road	2.86	38	2.15	34	2.33	31	3.07	40	3.6	46	3.74	41	3.35	36
Warwick Road	4.24	56	3.35	52	4.13	55	3.42	44	5.36	68	6.39	69	6.88	73
46-48 Warwick Road	8.44	112	7.98	125	9.92	132	9.74	126	9.81	125	10.34	112	10.59	113
18-20 Warwick Road	10.87	144	9.18	143	10.52	140	10.48	135	9.6	122	10.94	119	10.62	113
8 Warwick Road	13.55	180	11.58	181	12.04	160	12.32	159	12.71	161	13.87	151	12.35	132
The Square	11.05	146	8.89	139	10.38	138	10.02	129	10.76	137	11.12	121	10.94	117
59 Abbey End	2.05	27	1.52	24	NA	NA								
Smalley Place	4.31	57	3.18	50	3.74	50	4.73	61	4.80	61	4.52	49	4.48	48
Total	7.54	100	6.4	100	7.5	100	7.75	100	7.88	100	9.19	100	9.38	100
	23rd & 24th June		**22nd & 23rd June**		**26th & 27th September**		**10th & 11th July**		**9th & 10th July**		**8th & 9th July**			
	Sunny Spells		Overcast with heavy rain				Warm & mainly bright		Hot & bright		Warm with bright spell & some rain			
	Sunny Spells		bright spells with drizzle				Mild, bright spells with shc		Hot & bright		Hot with Bright spells			

Notes:

2008 counts carried out in September due to the works to the town centre.

April 24th - Sept 208 Severn Trent Closure of Warwick Road.

2008 Talisman Square refurbishment.

KENILWORTH - FRI & SAT COUNTS			Year 1999				Year 2000		Year 2001		Year 2002		Year 2003		Year 2004		Year 2005	
			Friday		Saturday													
	Occupier	Street & Address	Count	Index	Count	Index	Count Weel	Index	Count	Index	Count	Index	Count	Index	Count	Index	Count	Index
1	La Bella Restaurante	47 Abbey End	1.83	83	3.09	105	8.58	81	7.41	85	7.66	83	6.92	79	6.07	80	7.41	91
2	Kenilworth Connection	1 Abbey End	2.33	106	3.5	119	8.89	83	9.18	105	9.67	105	8.68	99	7.76	102	8.26	101
3	Sureclean	27 The Square	2.45	111	3.54	120	12.21	115	10.45	119	10.41	113	9.92	113	9.39	123	10.98	135
4	Budgens	Station Road	2.36	107	2.55	87	8.15	77	6.28	72	6.11	66	5.79	66	6.04	79	3.67	45
5	Moss Pharmacy	1-2 Warwick House	1.67	76	1.16	39	4.06	38	3.14	36	3.56	39	3.18	36	3.04	40	2.93	36
6	Shortland Horne	11 Talisman Square	2.67	121	3.95	134	12.95	122	10.2	117	12.81	139	11.72	134	10.2	134	8.08	99
7	Walkway to Car Park	Talisman Square	1.46	66	2.81	95	7.02	66	7.2	82	7.52	82	7.38	84	6.78	89	7.34	90
8	Boots	2 Talisman Square	3.41	155	4.5	153	14.97	140	11.36	130	13.09	143	11.44	131	9.49	125	12	147
9	Sketchley	7 Warwick Road	2.84	129	4.5	153	13.52	127	10.69	122	12.92	141	12.71	145	9.49	125	10.87	133
10	vacant	15 Warwick Road	2.96	134	3.87	131	15.6	146	13.27	152	12.74	139	11.44	131	9.85	129	9.81	120
11	woolworths	17 Warwick Road	4.08	185	5.87	199	26.89	252	22.13	253	21.64	236	20.75	237	18.53	243	17.72	217
12	thomson	49 Warwick Road	1.05	48	1.64	55	5.19	49	4.62	53	4.31	47	5.05	58	4.13	54	5.79	71
13	aromatics	93 Warwick Road	0.74	33	0.92	31	3	28	2.33	27	1.76	19	2.51	29	2.36	31	2.47	30
14	cutz	74 Warwick Road	0.71	32	1.04	35	3.32	31	3.07	35	3.67	40	3.32	38	3.11	41	2.72	33
15	Walkway to Sainsburys	Warwick Road	1.98	90	2.25	76	7.8	73	5.15	59	4.52	49	3.95	45	3.53	46	4.59	56
16	Co-Op Electrix	46-48 Warwick Road	1.55	70	2.52	86	10.41	98	9.64	110	9.78	106	10.66	122	9.21	121	9.07	111
17	Birthdays	18-20 Warwick Road	2.87	130	3.17	107	14.37	135	10.45	119	12.49	136	11.58	132	8.79	115	11.58	142
18	Barclays Bank	8 Warwick Road	2.96	134	2.88	98	14.89	140	11.26	129	12.46	136	13.09	149	11.22	147	14.29	175
19	Somerfield	The Square	3.03	138	3.2	108	15.71	147	12.85	147	11.61	126	11.29	129	10.38	136	11.29	138
20	vacant	59 Abbey End	1.19	54	2.03	69	5.54	52	4.41	50	4.98	54	3.88	44	3.04	40	2.33	29
	Average	**Total**	**2.2**	**100**	**2.95**	**100**	**10.65**	**100**	**8.75**	**100**	**9.19**	**100**	**8.76**	**100**	**7.62**	**100**	**8.16**	**100**
	date of count		**18th & 19th June**				**16th & 17th June**		**15th & 16th June**		**21st & 22nd June**		**27th & 28th June**		**25th & 26th June**		**15th 16th July**	
	weather - Friday		Warm & Sunny				Warm & Sunny		Fair with Thunderstorms		Fine and Dry		rm & overcast with show		Warm & Sunny		mild and sunny	
	weather - Saturday		Overcast with light showers				Very Hot & Sunny		Mild with Showers		Fine and Dry		hot & sunny		Rain, occassionally heavy		mild and sunny	

WARWICK			Year : 1999		Year : 2000		Year 2001		2002		2003		2004		2005	
	Occupier	Street & Address	Count Week	Index	Count Week	Index	Count Week	Index	Count Week	Index	Count Week	Index	Count Week	Index	Count Week	Index
1	Marks and Spencer	2 Westgate House	10.66	134	12.85	106	8.96	89	7.27	76	11.15	112	8.96	90	9.88	103
2	Boots	Market Street	11.22	141	15.11	124	12	119	10.02	105	12.42	125	13.06	131	11.72	122
3	WH Smith	Market Street	18.35	230	20.33	167	16.52	164	14.97	156	14.47	145	11.51	116	10.38	108
4	Woolw orths	40 The Hollow ay	16.87	212	20.12	166	16.59	164	13.13	137	7.69	77	6.71	68	6	62
5	Totally Thai Rest	16 Market Place	7.06	89	11.93	98	11.44	113	9.32	97	9.88	99	7.2	72	6.85	71
6	Robert Welch Studio	19 Old Square	4.52	57	11.44	94	9.88	98	10.31	108	12.07	121	13.27	134	8.05	84
7	Vacant	4-14 Old Square	3.88	49	6.56	54	5.79	57	5.65	59	6.07	61	3.88	39	5.65	59
8	Sue Allen Hair	3 Old Square	1.48	19	3.46	28	4.73	47	4.31	45	6.07	61	3.95	40	5.15	54
9	Dw elling	5 New Street	3.53	44	7.34	60	7.13	71	6.42	67	6.85	69	5.93	60	5.22	54
10	Vacant	9 Market Place	11.44	143	16.8	138	15.32	152	16.94	177	15.11	152	14.33	144	13.77	143
11	Sid & Jane Photos	13 Market Place	17.65	221	23.37	192	24.42	242	25.48	266	23.51	236	22.17	223	20.97	218
12	Claridges Cards	25 Sw an Street	16.02	201	18.99	156	25.34	251	23.22	243	24.57	247	18.64	188	18.35	191
13	vacant	4 Sw an Street	14.47	182	19.2	158	17.29	171	17.93	187	18.42	185	27.95	281	28.31	294
14	Ask	16-18 High Street	15.18	190	18.78	155	17.15	170	19.41	203	18.42	185	17.65	178	16.24	169
15	O'Gorman & Co Solicito	1a Church Street	7.34	92	13.06	107	5.58	55	5.79	61	6.56	66	8.26	83	6	62
16	Brian Holt Estate Agen	2 Church Street	3.32	42	10.52	87	3.25	32	2.75	29	3.88	39	3.67	37	3.39	35
17	Association of Estate /	21 Jury Street	6.28	79	9.25	76	7.69	76	7.62	80	6.21	62	6.92	70	8.26	86
18	Dw ellings	The Butts	2.4	30	4.16	34	1.55	15	2.05	21	1.55	16	1.62	16	2.54	26
19	Harlequin Clothing Hire	29 Smith Street	6.56	82	11.65	96	8.68	86	8.89	93	8.61	87	7.13	72	8.05	84
20	The Roebuck PH	57 Smith Street	5.86	74	10.66	88	7.27	72	6.35	66	5.72	57	6.49	65	6.07	63
21	St Johns Fish Bar	31 St Johns	4.66	58	5.86	48	6.49	64	5.44	57	5.44	55	4.73	48	4.24	44
22	CASA PIEDRA FLOORI	70 Smith Street	2.4	30	6.92	57	3.18	31	3.11	32	4.8	48	3.67	37	2.96	31
23	BLUE MONKEY WEB D	28 Smith Street	2.54	32	7.34	60	3.88	38	3.04	32	3.88	39	2.82	28	2.4	25
24	Dw ellings	20-26 Jury Street	2.33	29	4.16	34	2.33	23	3.32	35	4.73	48	1.84	18	1.69	18
25	Council Offices	Castle Street	4.8	60	12.92	106	10.73	106	9.32	97	14.4	145	12.21	123	11.72	122
26	Vacant	9 High Street	6.35	80	7.48	62	6.85	68	6.71	70	4.31	43	5.08	51	4.38	45
27	Warw ick Conservative	11 Sw an Street	11.29	142	17.15	141	14.61	145	13.2	138	13.62	137	31.2	314	33.88	352
28	WIGLEY WORM CH/WI	46 Brook Street	6.99	88	8.89	73	8.61	85	7.62	80	7.98	80	7.2	72	8.75	91
29	Greys Optician	Brook Street	8.12	102	11.22	92	8.19	81	6.92	72	7.48	75	9.18	92	8.4	87
30	Kozi Bar	62 Market Place	5.51	69	17.01	140	11.58	115	10.52	110	12.49	126	10.8	109	9.46	98
	Average	**Total**	**7.97**	**100**	**12.15**	**100**	**10.1**	**100**	**9.57**	**100**	**9.95**	**100**	**9.93**	**100**	**9.62**	**100**
	% difference on previous year				**34.40**		**-20.30**		**-5.54**		**3.82**		**-0.20**		**-3.22**	
		date of count	**18th & 19th June**		**9th & 10th June**		**29th & 30th June**		**5th & 6th July**				**2nd &3rd July**		**10th & 11th June**	
		weather - Friday	Fine & Sunny		Dull & Wet		Overcast & Light Show ers		Warm, overcast, & damp				unsettled		dry and Mild	
		weather - Saturday	Overcast w ith Show ers		Warm & Sunny		right spells & occassional Show er		dry, cloudy, w arm				unsettled		w arm and Sunny	

	WARWICK		2006		2007		2008		2009		2010		2011		2012	
	Occupier	Street & Address	Count Week	Index	count week	index	count	index	count	index	count	index	count	index	count	index
1	Marks and Spencer	2 Westgate House	9.04	92	7.62	80	8.12	95	9.39	104	9.81	102	12	120	9.53	124
2	Boots	Market Street	11.44	116	13.34	140	10.94	128	11.36	126	10.52	109	11.79	118	8.4	109
3	WH Smith	Market Street	11.93	121	10.31	108	11.01	128	8.4	93	10.31	107	10.94	109	9.04	117
4	Woolworths	40 The Holloway	7.41	75	6.35	66	4.87	57	3.39	38	2.96	31	4.87	49	4.16	54
5	Totally Thai Rest	16 Market Place	6.79	6.9	5.65	59	5.36	63	6	67	6.85	71	8.05	80	5.08	66
6	Robert Welch Studio	19 Old Square	8.89	90	9.25	97	10.66	124	11.36	126	12.45	129	13.06	131	10.08	130
7	Vacant	4-14 Old Square	5.22	53	3.88	41	4.52	53	3.88	43	5.15	53	4.94	49	3.53	46
8	Sue Allen Hair	3 Old Square	6.14	62	6	63	5.22	61	5.51	61	5.22	54	5.79	58	3.95	51
9	Dwelling	5 New Street	7.84	79	7.62	80	5.72	67	5.79	64	7.76	80	6.85	68	4.94	64
10	Vacant	9 Market Place	12.92	131	13.77	144	11.29	132	13.48	150	15.39	159	15.74	157	12.14	158
11	Sid & Jane Photos	13 Market Place	20.26	205	21.18	222	21.6	252	23.58	262	22.8	236	21.39	214	18.35	239
12	Claridges Cards	25 Swan Street	19.62	199	18.92	198	19.13	223	20.54	228	19.62	203	19.77	198	17.22	224
13	vacant	4 Swan Street	27.39	278	22.02	230	18.07	211	20.05	223	21.88	227	19.55	196	16.17	210
14	Ask	16-18 High Street	16.02	162	16.66	174	14.54	169	12.71	141	16.24	168	16.59	166	11.79	153
15	O'Gorman & Co Solicito	1a Church Street	5.15	52	5.01	52	4.73	55	4.8	53	5.79	60	6.56	66	4.24	55
16	Brian Holt Estate Agen	2 Church Street	3.04	31	3.88	41	3.04	35	3.39	38	3.88	40	4.24	42	2.75	36
17	Association of Estate /	21 Jury Street	8.75	89	8.89	93	8.12	95	8.89	99	10.38	108	10.8	108	7.91	103
18	Dwellings	The Butts	3.74	38	4.24	44	3.53	41	4.38	49	4.24	44	3.25	32	1.91	25
19	Harlequin Clothing Hire	29 Smith Street	8.33	84	7.06	74	6.14	72	6.64	74	7.48	78	8.61	86	6.99	91
20	The Roebuck PH	57 Smith Street	6.35	64	7.06	74	5.79	67	6.35	71	7.2	75	8.89	89	6.64	86
21	St Johns Fish Bar	31 St Johns	4.31	44	6.14	64	4.8	56	6.07	67	5.51	57	5.72	57	5.15	67
22	CASA PIEDRA FLOOR	70 Smith Street	3.32	34	2.61	27	2.75	32	3.95	44	3.6	37	3.46	35	3.04	39
23	BLUE MONKEY WEB D	28 Smith Street	3.04	31	3.53	37	2.96	35	3.88	43	4.16	43	4.02	40	3.39	44
24	Dwellings	20-26 Jury Street	2.12	21	2.05	21	2.33	27	2.4	27	2.82	29	3.18	32	2.26	29
25	Council Offices	Castle Street	13.06	132	12.57	131	10.59	123	10.09	112	10.24	106	11.69	114	8.26	107
26	Vacant	9 High Street	5.44	55	5.51	58	4.87	57	3.39	38	4.31	45	4.66	47	3.6	47
27	Warwick Conservative	11 Swan Street	32.05	325	31.27	327	26.05	304	28.31	314	30.92	320	30.85	309	22.66	294
28	WIGLEY WORM CH/WI	46 Brook Street	8.96	91	7.34	77	5.86	68	6.42	71	6.56	68	7.13	71	5.22	68
29	Greys Optician	Brook Street	8.75	89	7.76	81	6.42	75	7.27	81	7.62	79	7.98	80	5.58	72
30	Kozi Bar	62 Market Place	8.75	89	9.25	97	8.4	98	8.54	95	7.91	82	7.92	79	6.92	90
	Average	**Total**	**9.87**	**100**	**9.56**	**100**	**8.58**	**100**	**9.01**	**100**	**9.65**	**100**	**10**	**100**	**7.69**	**100**
	% difference on previous year		**2.53**		**-3.24**		**-11.42**		**4.77**		**6.63**		**3.50**		**-30.04**	
		date of count	**7th & 8th July**		**14th & 15th July**		**11th & 12th July**		**3rd & 4th July**		**24th & 25th September**		**1st & 2nd July**		**6th & 7th July**	
		weather - Friday			mainly overcast		Sunny Spells with Heavy Sho		Humid with Light Showers		Cold, Breezy & damp		Very Warm with Bright spells		Mild with heavy persistant rain	
		weather - Saturday	mild, occassional showers		bright		Sunny Spells Drizzle Later		Mainly Warm & Bright		Mainly bright, breezy later		Hot & Bright, becoming overcast and humid.		Mainly bright with occasional showers.	

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Convenience Goods Capacity Refresh

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2013 - 2029)

ZONE:	2013	2018	2023	2029	% GROWTH: 2013-29	2031
Zone 1:	35,689	37,290	38,771	40,575	13.7%	41,094
Zone 2:	31,692	33,312	34,803	36,603	15.5%	37,232
Zone 3:	31,356	34,055	36,471	39,188	25.0%	40,014
Zone 4:	28,704	30,303	31,837	33,469	16.6%	33,955
Zone 5:	27,403	29,122	30,583	32,271	17.8%	32,788
Zone 6:	41,696	43,461	45,287	47,359	13.6%	48,022
Zone 7:	24,694	25,116	25,602	26,391	6.9%	26,557
Zone 8:	27,576	28,040	28,656	29,315	6.3%	29,522
Zone 9:	33,683	35,310	36,963	38,759	15.1%	39,200
Zone 10:	21,025	22,108	23,110	24,169	15.0%	24,481
TOTAL:	**303,518**	**318,117**	**332,083**	**348,099**	**14.7%**	**352,865**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1 & 3	67,045	71,345	75,242	79,763	19.0%	81,108
CORE WEST (WARWICK) - Zone 2	31,692	33,312	34,803	36,603	15.5%	37,232
KENILWORTH - Zone 7	24,694	25,116	25,602	26,391	6.9%	26,557
SUB TOTAL:	**123,431**	**129,773**	**135,647**	**142,757**	**17.4%**	**144,897**

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.

Base year population derived from mid-year ONS population estimates.

Projections are based on Experian's revised 'demographic component model'. This takes into account 2011 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas and London Boroughs. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

TABLE 2: REVISED EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

ZONE:	2013 (incl SFT)	2013	2018	2023	2029	% GROWTH: 2013-29	2031
SPECIAL FORMS OF TRADING (%):		**2.50%**	**3.80%**	**4.80%**	**5.50%**		**6.00%**
Zone 1:	£1,901	£1,853	£1,869	£1,925	£2,004	8.1%	£2,026
Zone 2:	£1,983	£1,933	£1,950	£2,008	£2,091	8.1%	£2,113
Zone 3:	£1,826	£1,780	£1,795	£1,849	£1,925	8.1%	£1,946
Zone 4:	£1,948	£1,900	£1,916	£1,973	£2,054	8.1%	£2,076
Zone 5:	£1,815	£1,769	£1,785	£1,838	£1,914	8.1%	£1,934
Zone 6:	£1,731	£1,688	£1,702	£1,753	£1,825	8.1%	£1,845
Zone 7:	£2,093	£2,040	£2,058	£2,119	£2,207	8.1%	£2,230
Zone 8:	£2,218	£2,162	£2,181	£2,246	£2,339	8.1%	£2,364
Zone 9:	£2,132	£2,079	£2,097	£2,159	£2,248	8.1%	£2,273
Zone 10:	£2,255	£2,199	£2,217	£2,283	£2,378	8.1%	£2,403

Source: Average spend per capita estimates for 2012 are derived from Experian *'Retail Area Planner' Reports*.

Notes: Annual expenditure growth forecasts informed by Experian Business Strategies - *Retail Planner Briefing Note 10.1 (September 2012).*

An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year and over the forecast period based on the research and forecasts published by Experian Business Strategies in the most recent Retail

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, 2013 - 2029 (£ million)

ZONE:	2013	2018	2023	2029	GROWTH: 2013-29 %	GROWTH: 2013-29 £m	2031
Zone 1:	£66.1	£69.7	£74.6	£81.3	22.9%	£15.2	£83.2
Zone 2:	£61.3	£65.0	£69.9	£76.5	24.9%	£15.3	£78.7
Zone 3:	£55.8	£61.1	£67.4	£75.4	35.2%	£19.6	£77.9
Zone 4:	£54.5	£58.1	£62.8	£68.8	26.1%	£14.2	£70.5
Zone 5:	£48.5	£52.0	£56.2	£61.8	27.4%	£13.3	£63.4
Zone 6:	£70.4	£74.0	£79.4	£86.4	22.8%	£16.1	£88.6
Zone 7:	£50.4	£51.7	£54.3	£58.2	15.6%	£7.8	£59.2
Zone 8:	£59.6	£61.2	£64.4	£68.6	15.0%	£8.9	£69.8
Zone 9:	£70.0	£74.0	£79.8	£87.1	24.4%	£17.1	£89.1
Zone 10:	£46.2	£49.0	£52.8	£57.5	24.3%	£11.2	£58.8
TOTAL:	**£582.9**	**£615.7**	**£661.5**	**£721.7**	**23.8%**	**£138.8**	**£739.2**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1 & 3	£122.0	£130.8	£142.1	£156.8	28.5%	£34.8	£161.1
CORE WEST (WARWICK) - Zones 2	£61.3	£65.0	£69.9	£76.5	24.9%	£15.3	£78.7
KENILWORTH - Zone 7	£50.4	£51.7	£54.3	£58.2	15.6%	£7.8	£59.2
SUB TOTAL:	**£233.6**	**£247.5**	**£266.2**	**£291.5**	**24.8%**	**£57.9**	**£299.0**

Source: Expenditure calcualted by multiplying population (Table 1) and expenditure per capita levels (Table 2) for each zone.

WARWICK DISTRICT COUNCIL

RETAIL AND LEISURE STUDY UPDATE 2014

Convenience Goods Capacity Refresh

TABLE 4: ALL FOOD SHOPPING - 2013 MARKET SHARE ANALYSIS (%)

	1	2	3	4	5	6	7	8	9	10	TOTAL
ROYAL LEAMINGTON SPA											
Mark and Spencer (Parade)	6.0%	1.8%	0.9%	1.6%	1.3%	0.2%	0.8%	0.0%	0.0%	0.1%	1.3%
Tesco (Parade)	18.0%	3.9%	6.5%	3.4%	0.1%	0.0%	0.2%	0.0%	0.1%	0.9%	3.5%
Co-Op (Clemens Street)	0.0%	0.3%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%
Cost Cutter (High Street)	0.0%	0.5%	0.6%	3.1%	0.2%	0.0%	0.0%	0.0%	0.1%	0.0%	0.4%
Other Convenience Floorspace	7.2%	2.0%	7.9%	0.8%	0.7%	0.0%	0.2%	0.7%	0.4%	0.0%	2.1%
SUB TOTAL:	**31.3%**	**8.5%**	**16.2%**	**8.9%**	**2.4%**	**0.2%**	**1.2%**	**0.9%**	**0.6%**	**1.1%**	**7.4%**
WARWICK											
Sainsburys (Saltisford)	1.9%	22.8%	1.5%	2.1%	0.0%	0.2%	1.4%	11.3%	8.4%	0.9%	5.3%
Marks and Spencer (Market Street)	0.0%	3.9%	0.0%	0.0%	0.0%	0.0%	0.8%	0.1%	0.1%	0.0%	0.5%
Other convenience floorspace	0.0%	5.9%	0.0%	0.4%	0.0%	0.2%	0.0%	0.7%	0.6%	0.0%	0.8%
SUB TOTAL:	**1.9%**	**32.6%**	**1.5%**	**2.4%**	**0.0%**	**0.5%**	**2.2%**	**12.2%**	**9.1%**	**0.9%**	**6.7%**
KENILWORTH											
Sainsburys (Warwick Road)	0.7%	0.0%	0.0%	0.0%	0.8%	2.4%	34.5%	1.0%	0.0%	0.0%	3.5%
Waitrose (Bertie Road)	1.2%	0.7%	0.2%	0.5%	0.2%	3.3%	23.4%	3.0%	0.0%	0.1%	3.0%
Other convenience floorspace	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	11.7%	0.0%	0.0%	0.6%	1.1%
SUB TOTAL:	**1.9%**	**0.7%**	**0.2%**	**0.5%**	**1.0%**	**5.8%**	**69.6%**	**4.0%**	**0.0%**	**0.7%**	**7.6%**
OUT OF TOWN STORES											
Aldi (Queensway, Leamington Spa):	0.0%	0.2%	3.0%	0.8%	1.6%	0.0%	1.0%	0.0%	0.1%	0.0%	0.6%
Asda (Chesterton Drive, Sydenham)	8.7%	3.1%	38.1%	12.0%	0.1%	0.0%	1.6%	0.7%	0.3%	1.4%	6.5%
Lidl (Myton Road, Warwick)	0.8%	5.0%	1.7%	1.1%	0.1%	0.0%	1.0%	0.0%	0.9%	0.9%	1.2%
Morrisons (Old Warwick Rd, Leamington Spa)	5.1%	4.4%	7.8%	0.8%	0.0%	0.1%	0.4%	1.0%	0.5%	0.6%	2.1%
Sainsbury's (Leamington Shopping Park)	19.7%	12.5%	18.0%	10.1%	0.1%	0.9%	1.3%	0.7%	1.8%	8.1%	7.4%
Sainsburys Local (Coten End, Warwick)	3.0%	7.6%	0.2%	0.7%	0.0%	0.0%	0.0%	1.6%	2.7%	0.9%	1.8%
Tesco (Emscote Road, Warwick)	16.9%	18.6%	6.3%	1.1%	0.1%	0.0%	6.3%	3.8%	3.3%	2.3%	6.1%
SUB TOTAL:	**54.2%**	**51.4%**	**75.1%**	**26.7%**	**2.0%**	**1.0%**	**11.7%**	**7.7%**	**9.5%**	**14.3%**	**25.6%**
ALL OTHER STORES IN DISTRICT	6.9%	1.8%	2.3%	0.1%	0.0%	0.2%	8.0%	0.5%	0.4%	0.4%	2.1%
RETENTION BY WARWICK DISTRICT STORES:	**96.2%**	**95.0%**	**95.3%**	**38.6%**	**5.4%**	**7.8%**	**92.7%**	**25.3%**	**19.6%**	**17.4%**	**49.4%**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT											
Banbury	0.0%	0.0%	0.6%	6.5%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.9%
Birmingham	0.0%	0.7%	0.0%	0.0%	0.1%	0.0%	0.2%	4.6%	0.7%	0.1%	0.7%
Coventry	1.5%	1.4%	0.2%	2.3%	53.4%	89.2%	5.3%	1.1%	0.2%	1.6%	16.5%
Rugby	1.1%	0.4%	0.2%	5.1%	28.1%	0.6%	0.2%	0.0%	0.4%	1.1%	3.2%
Solihull	0.5%	0.6%	0.3%	1.0%	0.0%	0.1%	0.0%	37.3%	0.7%	0.0%	4.2%
Southam	0.0%	0.3%	0.7%	31.9%	0.5%	0.0%	0.0%	0.0%	0.1%	0.0%	3.1%
Stratford-upon-Avon	0.1%	1.0%	0.1%	1.9%	0.0%	0.1%	1.3%	6.7%	73.0%	50.8%	13.9%
Other	0.7%	0.4%	2.5%	12.7%	12.5%	2.2%	0.3%	25.0%	5.3%	25.8%	8.1%
MARKET SHARES OF ALL OTHER STORES:	**3.8%**	**5.0%**	**4.7%**	**61.4%**	**94.6%**	**92.2%**	**7.3%**	**74.7%**	**80.4%**	**82.6%**	**50.6%**
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Baseline market share analysis is informed by the results of the 2013 Household Telephone Interview Survey commissioned by Strategic Perspectives. The market share analysis for all food shopping is based on the survey results for 'main', 'secondary' and 'top-up' food shopping, weighted by expenditure.

TABLE 5: ALL FOOD SHOPPING - 2013 MARKET SHARE ANALYSIS (£m @ 2011 prices)

	1	2	3	4	5	6	7	8	9	10	TOTAL
AVAILABLE EXPENDITURE (£m):	**£66.1**	**£61.3**	**£55.8**	**£54.5**	**£48.5**	**£70.4**	**£50.4**	**£59.6**	**£70.0**	**£46.2**	**£582.9**
ROYAL LEAMINGTON SPA											
Mark and Spencer (Parade)	£4.0	£1.1	£0.5	£0.9	£0.6	£0.2	£0.4	£0.0	£0.0	£0.1	£7.7
Tesco (Parade)	£11.9	£2.4	£3.6	£1.8	£0.1	£0.0	£0.1	£0.0	£0.1	£0.4	£20.4
Co-Op (Clemens Street)	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.5
Cost Cutter (High Street)	£0.0	£0.3	£0.3	£1.7	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£2.5
Other Convenience Floorspace	£4.8	£1.2	£4.4	£0.5	£0.4	£0.0	£0.1	£0.4	£0.3	£0.0	£12.0
SUB TOTAL:	**£20.7**	**£5.2**	**£9.1**	**£4.9**	**£1.1**	**£0.2**	**£0.6**	**£0.5**	**£0.4**	**£0.5**	**£43.1**
WARWICK											
Sainsburys (Saltisford)	£1.3	£14.0	£0.8	£1.1	£0.0	£0.2	£0.7	£6.8	£5.9	£0.4	£31.1
Marks and Spencer (Market Street)	£0.0	£2.4	£0.0	£0.0	£0.0	£0.0	£0.4	£0.1	£0.1	£0.0	£2.9
Other convenience floorspace	£0.0	£3.6	£0.0	£0.2	£0.0	£0.2	£0.0	£0.4	£0.4	£0.0	£4.8
SUB TOTAL:	**£1.3**	**£19.9**	**£0.8**	**£1.3**	**£0.0**	**£0.3**	**£1.1**	**£7.3**	**£6.4**	**£0.4**	**£38.9**
KENILWORTH											
Sainsburys (Warwick Road)	£0.5	£0.0	£0.0	£0.0	£0.4	£1.7	£17.4	£0.6	£0.0	£0.0	£20.5
Waitrose (Bertie Road)	£0.8	£0.5	£0.1	£0.3	£0.1	£2.3	£11.8	£1.8	£0.0	£0.1	£17.7
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£5.9	£0.0	£0.0	£0.3	£6.2
SUB TOTAL:	**£1.3**	**£0.5**	**£0.1**	**£0.3**	**£0.5**	**£4.1**	**£35.1**	**£2.4**	**£0.0**	**£0.3**	**£44.5**
OUT OF TOWN STORES											
Aldi (Queensway, Leamington Spa):	£0.0	£0.1	£1.7	£0.5	£0.8	£0.0	£0.5	£0.0	£0.1	£0.0	£3.6
Asda (Chesterton Drive, Sydenham)	£5.8	£1.9	£21.3	£6.5	£0.1	£0.0	£0.8	£0.4	£0.2	£0.6	£37.6
Lidl (Myton Road, Warwick)	£0.5	£3.1	£1.0	£0.6	£0.1	£0.0	£0.5	£0.0	£0.6	£0.4	£6.8
Morrisons (Old Warwick Rd, Leamington Spa)	£3.3	£2.7	£4.4	£0.5	£0.0	£0.1	£0.2	£0.6	£0.3	£0.3	£12.3
Sainsbury's (Leamington Shopping Park)	£13.0	£7.6	£10.0	£5.5	£0.1	£0.6	£0.7	£0.4	£1.3	£3.8	£43.1
Sainsburys Local (Coten End, Warwick)	£2.0	£4.7	£0.1	£0.4	£0.0	£0.0	£0.0	£0.9	£1.9	£0.4	£10.4
Tesco (Emscote Road, Warwick)	£11.2	£11.4	£3.5	£0.6	£0.1	£0.0	£3.2	£2.3	£2.3	£1.1	£35.5
SUB TOTAL:	**£35.9**	**£31.5**	**£41.9**	**£14.6**	**£1.0**	**£0.7**	**£5.9**	**£4.6**	**£6.6**	**£6.6**	**£149.3**
ALL OTHER STORES IN DISTRICT	£4.6	£1.1	£1.3	£0.1	£0.0	£0.2	£4.0	£0.3	£0.3	£0.2	£12.0
RETENTION BY WARWICK DISTRICT STORES:	**£63.6**	**£58.2**	**£53.2**	**£21.1**	**£2.6**	**£5.5**	**£46.7**	**£15.1**	**£13.7**	**£8.0**	**£287.7**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT											
Banbury	£0.0	£0.0	£0.4	£3.5	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£5.3
Birmingham	£0.0	£0.5	£0.0	£0.0	£0.1	£0.0	£0.1	£2.7	£0.5	£0.1	£3.9
Coventry	£1.0	£0.9	£0.1	£1.2	£25.9	£62.8	£2.7	£0.7	£0.1	£0.8	£96.1
Rugby	£0.7	£0.3	£0.1	£2.8	£13.6	£0.4	£0.1	£0.0	£0.3	£0.5	£18.8
Solihull	£0.3	£0.4	£0.2	£0.5	£0.0	£0.1	£0.0	£22.2	£0.5	£0.0	£24.2
Southam	£0.0	£0.2	£0.4	£17.4	£0.2	£0.0	£0.0	£0.0	£0.1	£0.0	£18.3
Stratford-upon-Avon	£0.1	£0.6	£0.1	£1.1	£0.0	£0.1	£0.7	£4.0	£51.1	£23.5	£81.1
Other	£0.5	£0.3	£1.4	£6.9	£6.1	£1.6	£0.2	£14.9	£3.7	£11.9	£47.4
MARKET SHARES OF ALL OTHER STORES:	**£2.5**	**£3.1**	**£2.6**	**£33.5**	**£45.9**	**£64.9**	**£3.7**	**£44.6**	**£56.3**	**£38.2**	**£295.2**
TOTAL	**£66.1**	**£61.3**	**£55.8**	**£54.5**	**£48.5**	**£70.4**	**£50.4**	**£59.6**	**£70.0**	**£46.2**	**£582.9**

Source: Total expenditure drawn by shops and stores from within the study area and zones derived by applying the survey-derived market shares to total avaiable expenditure.

TABLE 6: ALL FOOD SHOPPING - 2018 MARKET SHARE ANALYSIS (£m @ 2011 prices)

	1	2	3	4	5	6	7	8	9	10	TOTAL
AVAILABLE EXPENDITURE (£m):	**£69.7**	**£65.0**	**£61.1**	**£58.1**	**£52.0**	**£74.0**	**£51.7**	**£61.2**	**£74.0**	**£49.0**	**£615.7**
ROYAL LEAMINGTON SPA											
Mark and Spencer (Parade)	£4.2	£1.1	£0.5	£0.9	£0.7	£0.2	£0.4	£0.0	£0.0	£0.1	£8.1
Tesco (Parade)	£12.6	£2.5	£4.0	£2.0	£0.1	£0.0	£0.1	£0.0	£0.1	£0.5	£21.7
Co-Op (Clemens Street)	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.6
Cost Cutter (High Street)	£0.0	£0.3	£0.3	£1.8	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£2.7
Other Convenience Floorspace	£5.0	£1.3	£4.8	£0.5	£0.4	£0.0	£0.1	£0.5	£0.3	£0.0	£12.9
SUB TOTAL:	**£21.8**	**£5.5**	**£9.9**	**£5.2**	**£1.2**	**£0.2**	**£0.6**	**£0.5**	**£0.4**	**£0.5**	**£45.9**
WARWICK											
Sainsburys (Saltisford)	£1.3	£14.8	£0.9	£1.2	£0.0	£0.2	£0.7	£6.9	£6.2	£0.5	£32.7
Marks and Spencer (Market Street)	£0.0	£2.5	£0.0	£0.0	£0.0	£0.0	£0.4	£0.1	£0.1	£0.0	£3.1
Other convenience floorspace	£0.0	£3.8	£0.0	£0.2	£0.0	£0.2	£0.0	£0.4	£0.4	£0.0	£5.1
SUB TOTAL:	**£1.3**	**£21.1**	**£0.9**	**£1.4**	**£0.0**	**£0.4**	**£1.1**	**£7.4**	**£6.8**	**£0.5**	**£40.9**
KENILWORTH											
Sainsburys (Warwick Road)	£0.5	£0.0	£0.0	£0.0	£0.4	£1.8	£17.9	£0.6	£0.0	£0.0	£21.1
Waitrose (Bertie Road)	£0.8	£0.5	£0.1	£0.3	£0.1	£2.4	£12.1	£1.9	£0.0	£0.1	£18.3
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£6.1	£0.0	£0.0	£0.3	£6.4
SUB TOTAL:	**£1.3**	**£0.5**	**£0.1**	**£0.3**	**£0.5**	**£4.3**	**£36.0**	**£2.4**	**£0.0**	**£0.3**	**£45.8**
OUT OF TOWN STORES											
Aldi (Queensway, Leamington Spa):	£0.0	£0.1	£1.8	£0.5	£0.8	£0.0	£0.5	£0.0	£0.1	£0.0	£3.9
Asda (Chesterton Drive, Sydenham)	£6.1	£2.0	£23.3	£6.9	£0.1	£0.0	£0.9	£0.4	£0.2	£0.7	£40.6
Lidl (Myton Road, Warwick)	£0.6	£3.3	£1.0	£0.6	£0.1	£0.0	£0.5	£0.0	£0.7	£0.5	£7.2
Morrisons (Old Warwick Rd, Leamington Spa)	£3.5	£2.9	£4.8	£0.5	£0.0	£0.1	£0.2	£0.6	£0.4	£0.3	£13.1
Sainsbury's (Leamington Shopping Park)	£13.7	£8.1	£11.0	£5.9	£0.1	£0.7	£0.7	£0.4	£1.3	£4.0	£45.9
Sainsburys Local (Coten End, Warwick)	£2.1	£4.9	£0.1	£0.4	£0.0	£0.0	£0.0	£1.0	£2.0	£0.5	£11.0
Tesco (Emscote Road, Warwick)	£11.8	£12.1	£3.8	£0.6	£0.1	£0.0	£3.3	£2.3	£2.4	£1.1	£37.5
SUB TOTAL:	**£37.8**	**£33.4**	**£45.9**	**£15.5**	**£1.1**	**£0.7**	**£6.0**	**£4.7**	**£7.0**	**£7.0**	**£159.2**
ALL OTHER STORES IN DISTRICT	£4.8	£1.1	£1.4	£0.1	£0.0	£0.2	£4.1	£0.3	£0.3	£0.2	£12.6
RETENTION BY WARWICK DISTRICT STORES:	**£67.0**	**£61.7**	**£58.3**	**£22.4**	**£2.8**	**£5.8**	**£47.9**	**£15.5**	**£14.5**	**£8.5**	**£304.4**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT											
Banbury	£0.0	£0.0	£0.4	£3.8	£0.0	£0.0	£0.0	£0.0	£0.0	£1.5	£5.7
Birmingham	£0.0	£0.5	£0.0	£0.0	£0.1	£0.0	£0.1	£2.8	£0.5	£0.1	£4.0
Coventry	£1.0	£0.9	£0.1	£1.3	£27.7	£66.0	£2.8	£0.7	£0.1	£0.8	£101.6
Rugby	£0.7	£0.3	£0.1	£2.9	£14.6	£0.5	£0.1	£0.0	£0.3	£0.5	£20.1
Solihull	£0.3	£0.4	£0.2	£0.6	£0.0	£0.1	£0.0	£22.8	£0.5	£0.0	£24.9
Southam	£0.0	£0.2	£0.4	£18.5	£0.3	£0.0	£0.0	£0.0	£0.1	£0.0	£19.5
Stratford-upon-Avon	£0.1	£0.7	£0.1	£1.1	£0.0	£0.1	£0.7	£4.1	£54.1	£24.9	£85.7
Other	£0.5	£0.3	£1.5	£7.4	£6.5	£1.6	£0.2	£15.3	£4.0	£12.7	£49.9
MARKET SHARES OF ALL OTHER STORES:	**£2.7**	**£3.3**	**£2.8**	**£35.6**	**£49.2**	**£68.2**	**£3.8**	**£45.7**	**£59.5**	**£40.5**	**£311.3**
TOTAL	**£69.7**	**£65.0**	**£61.1**	**£58.1**	**£52.0**	**£74.0**	**£51.7**	**£61.2**	**£74.0**	**£49.0**	**£615.7**

Source: Total expenditure drawn by shops and stores from within the study area and zones derived by applying the survey-derived market shares to total avaiable expenditure.

TABLE 7: ALL FOOD SHOPPING - 2023 MARKET SHARE ANALYSIS (£m @ 2011 prices)

	1	2	3	4	5	6	7	8	9	10	TOTAL
AVAILABLE EXPENDITURE (£m):	**£74.6**	**£69.9**	**£67.4**	**£62.8**	**£56.2**	**£79.4**	**£54.3**	**£64.4**	**£79.8**	**£52.8**	**£661.5**
ROYAL LEAMINGTON SPA											
Mark and Spencer (Parade)	£4.5	£1.2	£0.6	£1.0	£0.7	£0.2	£0.4	£0.0	£0.0	£0.1	£8.7
Tesco (Parade)	£13.5	£2.7	£4.4	£2.1	£0.1	£0.0	£0.1	£0.0	£0.1	£0.5	£23.4
Co-Op (Clemens Street)	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.6
Cost Cutter (High Street)	£0.0	£0.4	£0.4	£2.0	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£2.9
Other Convenience Floorspace	£5.4	£1.4	£5.3	£0.5	£0.4	£0.0	£0.1	£0.5	£0.3	£0.0	£13.9
SUB TOTAL:	**£23.3**	**£5.9**	**£10.9**	**£5.6**	**£1.3**	**£0.2**	**£0.6**	**£0.6**	**£0.5**	**£0.6**	**£49.6**
WARWICK											
Sainsburys (Saltisford)	£1.4	£15.9	£1.0	£1.3	£0.0	£0.2	£0.8	£7.3	£6.7	£0.5	£35.1
Marks and Spencer (Market Street)	£0.0	£2.7	£0.0	£0.0	£0.0	£0.0	£0.4	£0.1	£0.1	£0.0	£3.3
Other convenience floorspace	£0.0	£4.1	£0.0	£0.2	£0.0	£0.2	£0.0	£0.5	£0.5	£0.0	£5.5
SUB TOTAL:	**£1.4**	**£22.8**	**£1.0**	**£1.5**	**£0.0**	**£0.4**	**£1.2**	**£7.8**	**£7.3**	**£0.5**	**£43.9**
KENILWORTH											
Sainsburys (Warwick Road)	£0.5	£0.0	£0.0	£0.0	£0.4	£1.9	£18.7	£0.6	£0.0	£0.0	£22.2
Waitrose (Bertie Road)	£0.9	£0.5	£0.1	£0.3	£0.1	£2.6	£12.7	£1.9	£0.0	£0.1	£19.3
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£6.4	£0.0	£0.0	£0.3	£6.7
SUB TOTAL:	**£1.4**	**£0.5**	**£0.1**	**£0.3**	**£0.6**	**£4.6**	**£37.8**	**£2.6**	**£0.0**	**£0.4**	**£48.3**
OUT OF TOWN STORES											
Aldi (Queensway, Leamington Spa):	£0.0	£0.1	£2.0	£0.5	£0.9	£0.0	£0.5	£0.0	£0.1	£0.0	£4.2
Asda (Chesterton Drive, Sydenham)	£6.5	£2.1	£25.7	£7.5	£0.1	£0.0	£0.9	£0.5	£0.2	£0.7	£44.3
Lidl (Myton Road, Warwick)	£0.6	£3.5	£1.1	£0.7	£0.1	£0.0	£0.5	£0.0	£0.7	£0.5	£7.8
Morrisons (Old Warwick Rd, Leamington Spa)	£3.8	£3.1	£5.3	£0.5	£0.0	£0.1	£0.2	£0.6	£0.4	£0.3	£14.2
Sainsbury's (Leamington Shopping Park)	£14.7	£8.7	£12.1	£6.4	£0.1	£0.7	£0.7	£0.5	£1.4	£4.3	£49.6
Sainsburys Local (Coten End, Warwick)	£2.3	£5.3	£0.1	£0.5	£0.0	£0.0	£0.0	£1.0	£2.1	£0.5	£11.8
Tesco (Emscote Road, Warwick)	£12.6	£13.0	£4.2	£0.7	£0.1	£0.0	£3.4	£2.4	£2.6	£1.2	£40.3
SUB TOTAL:	**£40.5**	**£35.9**	**£50.6**	**£16.8**	**£1.1**	**£0.8**	**£6.3**	**£5.0**	**£7.6**	**£7.5**	**£172.2**
ALL OTHER STORES IN DISTRICT	£5.1	£1.2	£1.6	£0.1	£0.0	£0.2	£4.4	£0.3	£0.3	£0.2	£13.4
RETENTION BY WARWICK DISTRICT STORES:	**£71.8**	**£66.4**	**£64.3**	**£24.3**	**£3.0**	**£6.2**	**£50.3**	**£16.3**	**£15.6**	**£9.2**	**£327.3**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT											
Banbury	£0.0	£0.0	£0.4	£4.1	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£6.2
Birmingham	£0.0	£0.5	£0.0	£0.0	£0.1	£0.0	£0.1	£2.9	£0.6	£0.1	£4.2
Coventry	£1.1	£1.0	£0.1	£1.4	£30.0	£70.8	£2.9	£0.7	£0.2	£0.9	£109.2
Rugby	£0.8	£0.3	£0.1	£3.2	£15.8	£0.5	£0.1	£0.0	£0.3	£0.6	£21.7
Solihull	£0.4	£0.4	£0.2	£0.6	£0.0	£0.1	£0.0	£24.0	£0.6	£0.0	£26.2
Southam	£0.0	£0.2	£0.5	£20.0	£0.3	£0.0	£0.0	£0.0	£0.1	£0.0	£21.1
Stratford-upon-Avon	£0.1	£0.7	£0.1	£1.2	£0.0	£0.1	£0.7	£4.3	£58.3	£26.8	£92.2
Other	£0.5	£0.3	£1.7	£8.0	£7.0	£1.8	£0.2	£16.1	£4.3	£13.6	£53.4
MARKET SHARES OF ALL OTHER STORES:	**£2.9**	**£3.5**	**£3.1**	**£38.5**	**£53.2**	**£73.2**	**£4.0**	**£48.1**	**£64.2**	**£43.6**	**£334.2**
TOTAL	**£74.6**	**£69.9**	**£67.4**	**£62.8**	**£56.2**	**£79.4**	**£54.3**	**£64.4**	**£79.8**	**£52.8**	**£661.5**

Source: Total expenditure drawn by shops and stores from within the study area and zones derived by applying the survey-derived market shares to total avaiable expenditure.

TABLE 8: ALL FOOD SHOPPING - 2029 MARKET SHARE ANALYSIS (£m @ 2011 prices)

	1	2	3	4	5	6	7	8	9	10	TOTAL
AVAILABLE EXPENDITURE (£m):	**£81.3**	**£76.5**	**£75.4**	**£68.8**	**£61.8**	**£86.4**	**£58.2**	**£68.6**	**£87.1**	**£57.5**	**£721.7**
ROYAL LEAMINGTON SPA											
Mark and Spencer (Parade)	£4.9	£1.4	£0.7	£1.1	£0.8	£0.2	£0.5	£0.0	£0.0	£0.1	£9.5
Tesco (Parade)	£14.7	£3.0	£4.9	£2.3	£0.1	£0.0	£0.1	£0.0	£0.1	£0.5	£25.6
Co-Op (Clemens Street)	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.7
Cost Cutter (High Street)	£0.0	£0.4	£0.4	£2.1	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£3.2
Other Convenience Floorspace	£5.9	£1.5	£6.0	£0.6	£0.5	£0.0	£0.1	£0.5	£0.3	£0.0	£15.3
SUB TOTAL:	**£25.4**	**£6.5**	**£12.2**	**£6.1**	**£1.5**	**£0.2**	**£0.7**	**£0.6**	**£0.5**	**£0.6**	**£54.4**
WARWICK											
Sainsburys (Saltisford)	£1.5	£17.4	£1.1	£1.4	£0.0	£0.2	£0.8	£7.8	£7.3	£0.5	£38.2
Marks and Spencer (Market Street)	£0.0	£2.9	£0.0	£0.0	£0.0	£0.0	£0.5	£0.1	£0.1	£0.0	£3.6
Other convenience floorspace	£0.0	£4.5	£0.0	£0.2	£0.0	£0.2	£0.0	£0.5	£0.5	£0.0	£6.0
SUB TOTAL:	**£1.5**	**£24.9**	**£1.1**	**£1.7**	**£0.0**	**£0.4**	**£1.3**	**£8.3**	**£7.9**	**£0.5**	**£47.8**
KENILWORTH											
Sainsburys (Warwick Road)	£0.6	£0.0	£0.0	£0.0	£0.5	£2.1	£20.1	£0.7	£0.0	£0.0	£23.9
Waitrose (Bertie Road)	£1.0	£0.6	£0.2	£0.3	£0.1	£2.9	£13.6	£2.1	£0.0	£0.1	£20.8
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£6.8	£0.0	£0.0	£0.3	£7.2
SUB TOTAL:	**£1.5**	**£0.6**	**£0.2**	**£0.3**	**£0.6**	**£5.0**	**£40.6**	**£2.7**	**£0.0**	**£0.4**	**£51.9**
OUT OF TOWN STORES											
Aldi (Queensway, Leamington Spa):	£0.0	£0.2	£2.3	£0.6	£1.0	£0.0	£0.6	£0.0	£0.1	£0.0	£4.6
Asda (Chesterton Drive, Sydenham)	£7.1	£2.3	£28.8	£8.2	£0.1	£0.0	£1.0	£0.5	£0.2	£0.8	£49.0
Lidl (Myton Road, Warwick)	£0.7	£3.9	£1.3	£0.7	£0.1	£0.0	£0.6	£0.0	£0.8	£0.5	£8.5
Morrisons (Old Warwick Rd, Leamington Spa)	£4.1	£3.4	£5.9	£0.6	£0.0	£0.1	£0.2	£0.7	£0.4	£0.3	£15.7
Sainsbury's (Leamington Shopping Park)	£16.0	£9.6	£13.6	£7.0	£0.1	£0.8	£0.8	£0.5	£1.6	£4.7	£54.5
Sainsburys Local (Coten End, Warwick)	£2.5	£5.8	£0.2	£0.5	£0.0	£0.0	£0.0	£1.1	£2.3	£0.5	£12.9
Tesco (Emscote Road, Warwick)	£13.7	£14.3	£4.7	£0.8	£0.1	£0.0	£3.7	£2.6	£2.8	£1.3	£44.0
SUB TOTAL:	**£44.1**	**£39.4**	**£56.7**	**£18.4**	**£1.3**	**£0.9**	**£6.8**	**£5.3**	**£8.3**	**£8.2**	**£189.2**
ALL OTHER STORES IN DISTRICT	£5.6	£1.4	£1.8	£0.1	£0.0	£0.2	£4.7	£0.3	£0.3	£0.2	£14.6
RETENTION BY WARWICK DISTRICT STORES:	**£78.2**	**£72.7**	**£71.9**	**£26.6**	**£3.3**	**£6.7**	**£54.0**	**£17.3**	**£17.1**	**£10.0**	**£357.8**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT											
Banbury	£0.0	£0.0	£0.5	£4.5	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£6.7
Birmingham	£0.0	£0.6	£0.0	£0.0	£0.1	£0.0	£0.1	£3.1	£0.6	£0.1	£4.6
Coventry	£1.2	£1.1	£0.2	£1.6	£33.0	£77.1	£3.1	£0.8	£0.2	£0.9	£119.1
Rugby	£0.9	£0.3	£0.2	£3.5	£17.4	£0.5	£0.1	£0.0	£0.3	£0.6	£23.8
Solihull	£0.4	£0.5	£0.2	£0.7	£0.0	£0.1	£0.0	£25.6	£0.6	£0.0	£28.0
Southam	£0.0	£0.2	£0.5	£21.9	£0.3	£0.0	£0.0	£0.0	£0.1	£0.0	£23.1
Stratford-upon-Avon	£0.1	£0.8	£0.1	£1.3	£0.0	£0.1	£0.8	£4.6	£63.6	£29.2	£100.5
Other	£0.6	£0.3	£1.9	£8.7	£7.7	£1.9	£0.2	£17.2	£4.7	£14.8	£58.0
MARKET SHARES OF ALL OTHER STORES:	**£3.1**	**£3.8**	**£3.5**	**£42.2**	**£58.4**	**£79.7**	**£4.3**	**£51.2**	**£70.1**	**£47.5**	**£363.8**
TOTAL	**£81.3**	**£76.5**	**£75.4**	**£68.8**	**£61.8**	**£86.4**	**£58.2**	**£68.6**	**£87.1**	**£57.5**	**£721.7**

Source: Total expenditure drawn by shops and stores from within the study area and zones derived by applying the survey-derived market shares to total avaiable expenditure.

TABLE 9: ALL FOOD SHOPPING - 2031 MARKET SHARE ANALYSIS (£m @ 2011 prices)

	1	2	3	4	5	6	7	8	9	10	TOTAL
AVAILABLE EXPENDITURE (£m):	**£83.2**	**£78.7**	**£77.9**	**£70.5**	**£63.4**	**£88.6**	**£59.2**	**£69.8**	**£89.1**	**£58.8**	**£739.2**
ROYAL LEAMINGTON SPA											
Mark and Spencer (Parade)	£5.0	£1.4	£0.7	£1.1	£0.8	£0.2	£0.5	£0.0	£0.0	£0.1	£9.8
Tesco (Parade)	£15.0	£3.1	£5.0	£2.4	£0.1	£0.0	£0.1	£0.0	£0.1	£0.6	£26.3
Co-Op (Clemens Street)	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.7
Cost Cutter (High Street)	£0.0	£0.4	£0.4	£2.2	£0.1	£0.0	£0.0	£0.0	£0.1	£0.0	£3.3
Other Convenience Floorspace	£6.0	£1.6	£6.1	£0.6	£0.5	£0.0	£0.1	£0.5	£0.3	£0.0	£15.7
SUB TOTAL:	**£26.0**	**£6.7**	**£12.6**	**£6.3**	**£1.5**	**£0.2**	**£0.7**	**£0.6**	**£0.5**	**£0.6**	**£55.8**
WARWICK											
Sainsburys (Saltisford)	£1.6	£17.9	£1.1	£1.4	£0.0	£0.2	£0.8	£7.9	£7.5	£0.6	£39.1
Marks and Spencer (Market Street)	£0.0	£3.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.1	£0.1	£0.0	£3.7
Other convenience floorspace	£0.0	£4.7	£0.0	£0.3	£0.0	£0.2	£0.0	£0.5	£0.5	£0.0	£6.2
SUB TOTAL:	**£1.6**	**£25.6**	**£1.1**	**£1.7**	**£0.0**	**£0.4**	**£1.3**	**£8.5**	**£8.1**	**£0.6**	**£49.0**
KENILWORTH											
Sainsburys (Warwick Road)	£0.6	£0.0	£0.0	£0.0	£0.5	£2.1	£20.5	£0.7	£0.0	£0.0	£24.4
Waitrose (Bertie Road)	£1.0	£0.6	£0.2	£0.3	£0.1	£2.9	£13.8	£2.1	£0.0	£0.1	£21.2
Other convenience floorspace	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£7.0	£0.0	£0.0	£0.3	£7.3
SUB TOTAL:	**£1.6**	**£0.6**	**£0.2**	**£0.3**	**£0.6**	**£5.1**	**£41.2**	**£2.8**	**£0.0**	**£0.4**	**£52.9**
OUT OF TOWN STORES											
Aldi (Queensway, Leamington Spa):	£0.0	£0.2	£2.4	£0.6	£1.0	£0.0	£0.6	£0.0	£0.1	£0.0	£4.8
Asda (Chesterton Drive, Sydenham)	£7.3	£2.4	£29.7	£8.4	£0.1	£0.0	£1.0	£0.5	£0.3	£0.8	£50.4
Lidl (Myton Road, Warwick)	£0.7	£4.0	£1.3	£0.8	£0.1	£0.0	£0.6	£0.0	£0.8	£0.6	£8.7
Morrisons (Old Warwick Rd, Leamington Spa)	£4.2	£3.5	£6.1	£0.6	£0.0	£0.1	£0.2	£0.7	£0.4	£0.3	£16.1
Sainsbury's (Leamington Shopping Park)	£16.4	£9.8	£14.0	£7.2	£0.1	£0.8	£0.8	£0.5	£1.6	£4.8	£55.9
Sainsburys Local (Coten End, Warwick)	£2.5	£6.0	£0.2	£0.5	£0.0	£0.0	£0.0	£1.1	£2.4	£0.6	£13.2
Tesco (Emscote Road, Warwick)	£14.1	£14.7	£4.9	£0.8	£0.1	£0.0	£3.7	£2.6	£2.9	£1.4	£45.1
SUB TOTAL:	**£45.1**	**£40.5**	**£58.5**	**£18.8**	**£1.3**	**£0.9**	**£6.9**	**£5.4**	**£8.4**	**£8.4**	**£194.2**
ALL OTHER STORES IN DISTRICT	£5.7	£1.4	£1.8	£0.1	£0.0	£0.2	£4.8	£0.3	£0.3	£0.2	£14.9
RETENTION BY WARWICK DISTRICT STORES:	**£80.1**	**£74.7**	**£74.2**	**£27.2**	**£3.4**	**£6.9**	**£54.9**	**£17.6**	**£17.4**	**£10.2**	**£366.8**
OTHER CENTRES AND STORES OUTSIDE THE DISTRICT											
Banbury	£0.0	£0.0	£0.5	£4.6	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£6.9
Birmingham	£0.0	£0.6	£0.0	£0.0	£0.1	£0.0	£0.1	£3.2	£0.6	£0.1	£4.6
Coventry	£1.2	£1.1	£0.2	£1.6	£33.8	£79.0	£3.2	£0.8	£0.2	£1.0	£122.1
Rugby	£0.9	£0.3	£0.2	£3.6	£17.8	£0.6	£0.1	£0.0	£0.3	£0.6	£24.5
Solihull	£0.4	£0.5	£0.2	£0.7	£0.0	£0.1	£0.0	£26.0	£0.6	£0.0	£28.5
Southam	£0.0	£0.2	£0.5	£22.5	£0.3	£0.0	£0.0	£0.0	£0.1	£0.0	£23.6
Stratford-upon-Avon	£0.1	£0.8	£0.1	£1.4	£0.0	£0.1	£0.8	£4.7	£65.0	£29.9	£102.8
Other	£0.6	£0.3	£1.9	£9.0	£7.9	£2.0	£0.2	£17.5	£4.8	£15.2	£59.3
MARKET SHARES OF ALL OTHER STORES:	**£3.2**	**£3.9**	**£3.6**	**£43.3**	**£60.0**	**£81.7**	**£4.3**	**£52.1**	**£71.6**	**£48.6**	**£372.4**
TOTAL	**£83.2**	**£78.7**	**£77.9**	**£70.5**	**£63.4**	**£88.6**	**£59.2**	**£69.8**	**£89.1**	**£58.8**	**£739.2**

Source: Total expenditure drawn by shops and stores from within the study area and zones derived by applying the survey-derived market shares to total avaiable expenditure.

Convenience Goods Capacity Refresh

TABLE 10: TOTAL EXPENDITURE DRAWN BY ALL WARWICK DISTRICT'S STORES FROM WITHIN STUDY AREA (£m)

	2013	2018	2023	2029	2031
ROYAL LEAMINGTON SPA	£43.1	£45.9	£49.6	£54.4	£55.8
WARWICK	£38.9	£40.9	£43.9	£47.8	£49.0
KENILWORTH	£44.5	£45.8	£48.3	£51.9	£52.9
EDGE & OUT OF CENTRE STORES	£149.3	£159.2	£172.2	£189.2	£194.2
ALL OTHER STORES IN DISTRICT	£12.0	£12.6	£13.4	£14.6	£14.9
DISTRICT AREA TOTAL:	**£287.7**	**£304.4**	**£327.3**	**£357.8**	**£366.8**

TABLE 11: TOTAL CONVENIENCE GOODS TURNOVER (£m) - BASED ON MARKET SHARES & 'INFLOW' ESTIMATES

	Estimated Trade Draw from Outside Study Area (Zones 1-10)	2013	2018	2023	2029	2031
ROYAL LEAMINGTON SPA	0%	£43.1	£45.9	£49.6	£54.4	£55.8
WARWICK	0%	£38.9	£40.9	£43.9	£47.8	£49.0
KENILWORTH:	0%	£44.5	£45.8	£48.3	£51.9	£52.9
OUT OF TOWN STORES	0%	£149.3	£159.2	£172.2	£189.2	£194.2
ALL OTHER STORES IN DISTRICT	0%	£12.0	£12.6	£13.4	£14.6	£14.9
DISTRICT AREA TOTAL:		**£287.7**	**£304.4**	**£327.3**	**£357.8**	**£366.8**

Source: Trade draw estimates based on survey evidence, previous retail studies and judgement as to the likely trade draw of stores and centres from outside the defined study area (based on location, scale, range and quality of offer compared with competing centres/stores).

TABLE 12: ESTIMATED CONVENIENCE GOODS FLOORSPACE & 'BENCHMARK' TURNOVER LEVELS (£m)

	Estimated Conv Sales Area (m^2 net)	Average Sales Density (£ per m^2)	2013	2018	2023	2029	2031
ROYAL LEAMINGTON SPA							
Tesco (Parade)	1,858	£12,750	£23.7	£24.2	£24.8	£25.5	£25.8
Mark and Spencer (Parade)	1,115	£10,750	£12.0	£12.2	£12.5	£12.9	£13.0
Iceland (Bath Street)	557	£6,500	£3.6	£3.7	£3.8	£3.9	£3.9
Co-Op (Clemens Street)	650	£7,500	£4.9	£5.0	£5.1	£5.3	£5.3
Cost Cutter (High Street)	130	£7,500	£1.0	£1.0	£1.0	£1.1	£1.1
Other Convenience Floorspace	2,550	£3,500	£8.9	£9.1	£9.3	£9.6	£9.7
Subtotal	**6,860**	**£7,882**	**£54.1**	**£55.2**	**£56.6**	**£58.3**	**£58.9**
WARWICK							
Marks and Spencer (Market Street)	612	£10,750	£6.6	£6.7	£6.9	£7.1	£7.2
Sainsburys (Saltisford)	2,415	£12,500	£30.2	£30.8	£31.6	£32.5	£32.9
Other convenience floorspace	650	£3,500	£2.3	£2.3	£2.4	£2.5	£2.5
Subtotal	**3,677**	**£10,618**	**£39.0**	**£39.8**	**£40.8**	**£42.1**	**£42.5**
KENILWORTH							
Waitrose (Bertie Road)	1,966	£11,000	£21.6	£22.1	£22.6	£23.3	£23.5
Co-Op (The Square)	348	£7,500	£2.6	£2.7	£2.7	£2.8	£2.8
Iceland (Warwick Road)	186	£6,500	£1.2	£1.2	£1.3	£1.3	£1.3
Sainsburys (Warwick Road)	1,731	£12,500	£21.6	£22.1	£22.6	£23.3	£23.6
Other convenience floorspace	500	£3,500	£1.8	£1.8	£1.8	£1.9	£1.9
Subtotal	**4,731**	**£10,322**	**£48.8**	**£49.8**	**£51.1**	**£52.6**	**£53.2**
OUT OF TOWN STORES							
Sainsburys (Leamington Shopping Park)	4,219	£12,500	£52.7	£53.8	£55.2	£56.8	£57.4
Asda (Chesterton Drive, Sydenham)	2,651	£14,500	£38.4	£39.2	£40.2	£41.4	£41.8
Sainsburys Local (Coten End, Warwick)	293	£12,500	£3.7	£3.7	£3.8	£3.9	£4.0
Tesco (Emscote Road, Warwick)	3,730	£12,750	£47.6	£48.5	£49.7	£51.3	£51.8
Morrisons (Old Warwick Road)	2,686	£12,000	£32.2	£32.9	£33.7	£34.7	£35.1
One Stop (Tournament Square, Warwick)	280	£3,500	£1.0	£1.0	£1.0	£1.1	£1.1
Aldi (Queensway)	956	£4,500	£4.3	£4.4	£4.5	£4.6	£4.7
Lidl (Myton Road, Warwick)	1,063	£3,500	£3.7	£3.8	£3.9	£4.0	£4.0
Subtotal	**15,877**	**£11,565**	**£183.6**	**£187.3**	**£192.1**	**£197.9**	**£199.9**
TOTAL	**31,145**	**£10,453**	**£325.6**	**£332.1**	**£340.5**	**£350.9**	**£354.4**

Notes: The convenience goods sales area estimates are informed by the 2009 Warwick RLS and have been updated, where necessary, based on recent permissions and the latest Experian Goad data.
Average sales density estimates have been informed by company averages published by Verdict(discounting non-retail sales, such as VAT & petrol sales, etc.), other retail assessments and professional judgement.

TABLE 13: COMMITTED &/0R PLANNED RETAIL DEVELOPMENTS - FLOORSPACE & TURNOVER ESTIMATES (£m)

	Estimated Sales Area (m^2 net)	Average Sales (£ per m^2)	2013	2018	2023	2029	2031
Co-Op (Land Adjacent to Woodloes Tavern, Warwick)							
Convenience Goods:	250	£7,500	£1.9	£1.9	£2.0	£2.0	£2.0
Comparison Goods:	78	£7,000	£0.5	£0.6	£0.6	£0.7	£0.7
Sainsbury Local (Radford Road, Royal Leamington Spa)							
Convenience Goods:	198	£12,500	£2.5	£2.5	£2.6	£2.7	£2.7
Comparison Goods:	22	£8,500	£0.2	£0.2	£0.2	£0.2	£0.2
TOTAL CONVENIENCE TURNOVER:	**448**		**£4.4**	**£4.4**	**£4.5**	**£4.7**	**£4.7**

Source: Warwick District Council. The local Co-Op convenience store is located on land comprising part of the car park for the Woodloes Tavern (former Sarah Siddons) Public House, Deansway, Woodloes in Warwick (located adjacent to Reardon Court Local Centre). The Sainsbury's Local store is located at Radford Road (former The Oak public house) .

Notes: Average sales density estimates (£ per sq m) informed by previous retail studies, published information on company average turnovers by Verdict Research and other evidence.

TABLE 14: WARWICK DISTRICT - CONVENIENCE GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO
Assume Equilibrium at Base Year and Constant Market Shares

		2013	2018	2023	2029	2031
STEP 1:	TOTAL 'POTENTIAL' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£ m):	£287.7	£304.4	£327.3	£357.8	£366.8
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£ m):	£325.6	£332.1	£340.5	£350.9	£354.4
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-£37.8	-£27.7	-£13.2	£7.0	£12.4
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m):	£4.4	£4.4	£4.5	£4.7	£4.7
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**	**-£42.2**	**-£32.2**	**-£17.8**	**£2.3**	**£7.7**
STEP 6:	**FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:**					
i	Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,500	£12,752	£13,074	£13,471	£13,606
ii	**Net Floorspace Capacity (sq m):**	**-3,375**	**-2,522**	**-1,359**	**170**	**565**
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (sq m):	-4,822	-3,603	-1,942	242	807

STEP 1: Sets out the estimated turnover of all existing convenience goods floorspace in Warwick District at 2013 based on the survey-derived market share analysis. The forecast growth in turnover over the development plan period (to 2029) assumes constant market shares.

STEP 2: Sets out the total assumed 'benchmark' turnover of existing convenience goods floorspace at 2013 based on Table 12. The forecast growth in all 'benchmark' turnovers over the development plan period has been constrained by an annual floorspace 'productivity' growth based on Experian's latest Retail Planner Briefing Note. In this case an average annual 'productivity' growth of +0.5% has been assumed.

STEP 3: Identifies the forecast residual expenditure capacity available to support new convenience goods floorspace over the forecast period (pre commitments). This is the difference between the 'potential' turnover (Step 1) and 'benchmark' turnover (Step 2) forecasts.

STEP 4: Sets out the forecast convenience goods turnover of all committed floorspace that had planning permission and/or was under construction at the time of preparing this assessment. An allowance has also been made for the growth in 'productivity' of all committed floorspace (as above).

STEP 5: The forecast net residual expenditure available to support new convenience goods floorspace after taking account of all new commitments.

STEP 6: Sets out the forecasts capacity for new convenience goods floorspace (net and gross) over the forecast period. The forecast residual expenditure capacity (£ million) has been converted to a net retail sales area based on an assumed average sales density for all new convenience goods floorspace of circa £12,500 per m^2 in 2013 (2011 prices). This is informed by the published average turnover levels of the main foodstore operators. Notwithstanding this, it should be noted that the average sales levels for different grocery retailers will vary due to a range of factors, including brand, location and the scale and quality of the food offer. For example, the 'deep discounters' (i.e. Aldi and Lidl) achieve substantially lower average sales levels than the 'top 5' grocery retailers (i.e. Asda, Tesco, Sainsbury's, Morrisons and Waitrose).

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WARWICK DISTRICT COUNCIL

RETAIL AND LEISURE STUDY UPDATE 2014

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Comparison Goods Capacity Assessment

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2013 - 2029)

ZONE:	2013	2018	2023	2029	% GROWTH: 2013-29	2031
Zone 1:	35,689	37,290	38,771	40,575	13.7%	41,094
Zone 2:	31,692	33,312	34,803	36,603	15.5%	37,232
Zone 3:	31,356	34,055	36,471	39,188	25.0%	40,014
Zone 4:	28,704	30,303	31,837	33,469	16.6%	33,955
Zone 5:	27,403	29,122	30,583	32,271	17.8%	32,788
Zone 6:	41,696	43,461	45,287	47,359	13.6%	48,022
Zone 7:	24,694	25,116	25,602	26,391	6.9%	26,557
Zone 8:	27,576	28,040	28,656	29,315	6.3%	29,522
Zone 9:	33,683	35,310	36,963	38,759	15.1%	39,200
Zone 10:	21,025	22,108	23,110	24,169	15.0%	24,481
TOTAL:	**303,518**	**318,117**	**332,083**	**348,099**	**14.7%**	**352,865**
CORE EAST (Royal Leamington Spa) - Zones 1 & 3	67,045	71,345	75,242	79,763	19.0%	81,108
CORE WEST (Warwick) - Zone 2	31,692	33,312	34,803	36,603	15.5%	37,232
KENILWORTH - Zone 7	24,694	25,116	25,602	26,391	6.9%	26,557
SUB TOTAL:	**123,431**	**129,773**	**135,647**	**142,757**	**17.4%**	**144,897**

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.

Base year population derived from mid-year ONS population estimates.

Projections are based on Experian's revised 'demographic component model'. This takes into account 2011 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

TABLE 2: REVISED EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

ZONE:	2013 (incl SFT)	2013	2018	2023	2029	% GROWTH: 2013-29	2031
SPECIAL FORMS OF TRADING (%):		**10.80%**	**14.50%**	**15.90%**	**16.50%**		**17.50%**
Zone 1:	£3,212	£2,865	£3,156	£3,589	£4,230	47.6%	£4,425
Zone 2:	£3,385	£3,019	£3,326	£3,781	£4,457	47.6%	£4,663
Zone 3:	£2,873	£2,563	£2,823	£3,210	£3,783	47.6%	£3,958
Zone 4:	£3,355	£2,993	£3,296	£3,748	£4,417	47.6%	£4,621
Zone 5:	£2,743	£2,447	£2,695	£3,065	£3,612	47.6%	£3,779
Zone 6:	£2,774	£2,475	£2,726	£3,099	£3,653	47.6%	£3,822
Zone 7:	£3,521	£3,141	£3,459	£3,933	£4,636	47.6%	£4,850
Zone 8:	£3,967	£3,539	£3,898	£4,432	£5,224	47.6%	£5,465
Zone 9:	£3,517	£3,137	£3,455	£3,929	£4,630	47.6%	£4,844
Zone 10:	£3,918	£3,495	£3,849	£4,376	£5,158	47.6%	£5,396

Source: Average spend per capita estimates for 2013 are derived from Experian *'Retail Area Planner' Reports* .

Notes: Annual expenditure growth forecasts informed by Experian Business Strategies - *Retail Planner Briefing Note 10.1 (September 2012).*

An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year and over the forecast period based on the research and forecasts published by EBS in the most recent Retail Planning Briefing Note.

TABLE 3: TOTAL AVAILABLE EXPENDITURE, 2013 - 2029 (£ million)

ZONE:	2013	2018	2023	2029	GROWTH: 2013-29 %	GROWTH: 2013-29 £m	2031
Zone 1:	£102.3	£117.7	£139.1	£171.6	67.8%	£69.4	£181.8
Zone 2:	£95.7	£110.8	£131.6	£163.1	70.5%	£67.4	£173.6
Zone 3:	£80.4	£96.1	£117.1	£148.3	84.5%	£67.9	£158.4
Zone 4:	£85.9	£99.9	£119.3	£147.8	72.1%	£61.9	£156.9
Zone 5:	£67.1	£78.5	£93.7	£116.6	73.8%	£49.5	£123.9
Zone 6:	£103.2	£118.5	£140.4	£173.0	67.7%	£69.8	£183.5
Zone 7:	£77.6	£86.9	£100.7	£122.3	57.8%	£44.8	£128.8
Zone 8:	£97.6	£109.3	£127.0	£153.1	56.9%	£55.5	£161.3
Zone 9:	£105.7	£122.0	£145.2	£179.5	69.9%	£73.8	£189.9
Zone 10:	£73.5	£85.1	£101.1	£124.7	69.7%	£51.2	£132.1
TOTAL:	**£888.7**	**£1,024.8**	**£1,215.3**	**£1,500.0**	**68.8%**	**£611.3**	**£1,590.3**
CORE EAST (Royal Leamington Spa) - Zones 1 & 3	£182.6	£213.8	£256.2	£319.9	75.1%	£137.2	£340.2
CORE WEST (Warwick) - Zone 2	£95.7	£110.8	£131.6	£163.1	70.5%	£67.4	£173.6
KENILWORTH - Zone 7	£77.6	£86.9	£100.7	£122.3	57.8%	£44.8	£128.8
SUB TOTAL:	**£355.9**	**£411.5**	**£488.5**	**£605.4**	**70.1%**	**£249.5**	**£642.6**

Source: Expenditure calcualted by multiplying population (Table 1) and expenditure per capita levels (Table 2) for each zone.

Comparison Goods Capacity Assessment

TABLE 4: MARKET SHARE ANALYSIS (%) - BASED ON 2013 HOUSEHOLD SURVEY

	1	2	3	4	5	6	7	8	9	10	TOTAL
TOWN CENTRES:											
Royal Leamington Spa	63.9%	40.3%	57.4%	41.6%	12.2%	6.5%	26.7%	7.6%	8.6%	13.5%	27.9%
Warwick	2.3%	15.9%	1.4%	1.6%	0.1%	0.5%	2.0%	3.1%	3.5%	0.5%	3.3%
Kenilworth	1.1%	0.7%	0.1%	0.6%	0.2%	1.5%	28.9%	0.6%	0.2%	0.3%	3.1%
Sub Total:	**67.3%**	**56.9%**	**58.9%**	**43.8%**	**12.4%**	**8.6%**	**57.6%**	**11.3%**	**12.3%**	**14.3%**	**34.3%**
OUT OF CENTRE:											
Leamington Shopping Park	6.1%	5.5%	7.9%	3.7%	0.7%	0.2%	1.5%	0.9%	0.3%	0.8%	2.8%
Sainsbury's, Leamington Shopping Par	0.7%	0.9%	2.4%	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.4%	0.5%
Argos, Leamington Shopping Park	0.7%	0.9%	1.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.4%
Currys, Tachbrook Drive	2.6%	2.7%	3.0%	1.5%	0.0%	0.2%	0.8%	0.2%	0.3%	0.2%	1.2%
Pets at Home, Myton Road	0.2%	0.4%	0.2%	0.1%	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	0.1%
Homebase, Myton Road	1.8%	1.5%	2.1%	0.9%	0.0%	0.2%	0.3%	0.4%	0.3%	0.2%	0.8%
Homebase, Emscote Road	0.9%	1.3%	0.6%	0.3%	0.0%	0.1%	0.1%	0.5%	0.2%	0.0%	0.4%
Morrisons, Old Warwick Road	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Chesterton Drive	1.6%	0.4%	6.8%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	1.0%
Tesco, Emscote Road, Warwick	0.4%	1.7%	0.6%	0.0%	0.0%	0.0%	0.5%	0.5%	0.7%	0.5%	0.5%
Sainsbury's, Saltisford, Warwick	0.0%	0.6%	0.0%	0.1%	0.1%	0.0%	0.0%	0.1%	0.7%	0.0%	0.2%
Other Edge/ Out-of-Centre	1.0%	0.6%	0.3%	0.4%	0.2%	0.0%	0.2%	0.1%	0.3%	0.0%	0.3%
Sub Total:	**16.0%**	**16.5%**	**25.4%**	**9.2%**	**1.0%**	**0.7%**	**3.4%**	**2.8%**	**3.5%**	**2.3%**	**8.2%**
All Other WDC Centres/Stores	0.8%	1.8%	0.4%	0.3%	0.1%	0.2%	0.6%	0.8%	0.2%	0.2%	0.6%
RETAINED BY WDC STORES:	**84.1%**	**75.3%**	**84.7%**	**53.3%**	**13.6%**	**9.4%**	**61.6%**	**14.9%**	**16.0%**	**16.9%**	**43.0%**
OTHER CENTRES AND STORES OUTSIDE DISTRICT											
Banbury	0.0%	0.2%	1.0%	13.8%	0.5%	0.1%	0.0%	0.1%	0.4%	6.4%	2.1%
Birmingham	0.6%	1.8%	0.8%	0.0%	1.7%	2.8%	1.0%	4.9%	1.0%	1.3%	1.6%
Coventry	8.6%	7.3%	6.8%	5.6%	54.0%	77.3%	22.3%	1.8%	2.8%	1.5%	18.6%
Rugby	0.3%	0.0%	0.3%	7.8%	21.7%	0.0%	0.0%	0.1%	0.0%	0.0%	2.5%
Solihull	2.5%	5.3%	2.1%	2.5%	2.3%	5.0%	9.0%	50.6%	7.2%	2.8%	9.5%
Stratford-upon-Avon	1.4%	7.6%	2.1%	2.7%	0.1%	0.3%	2.6%	6.9%	64.1%	60.5%	15.1%
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
All other shops and stores	2.4%	2.6%	2.2%	14.3%	6.2%	5.1%	3.5%	20.7%	8.4%	10.5%	7.7%
Sub Total:	**15.9%**	**24.7%**	**15.3%**	**46.7%**	**86.4%**	**90.6%**	**38.4%**	**85.1%**	**84.0%**	**83.1%**	**57.0%**
TOTAL:	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Market shares derived from 2013 Household Telephone Interview Survey (2013) commissioned by Strategic Perspectives.

TABLE 5: 2013 MARKET SHARE ANALYSIS (£m)

	1	2	3	4	5	6	7	8	9	10	TOTAL
AVAILABLE EXPENDITURE (£m):	**£102.3**	**£95.7**	**£80.4**	**£85.9**	**£67.1**	**£103.2**	**£77.6**	**£97.6**	**£105.7**	**£73.5**	**£888.7**
TOWN CENTRES:											
Royal Leamington Spa	£65.3	£38.5	£46.1	£35.7	£8.2	£6.7	£20.7	£7.4	£9.1	£9.9	£247.7
Warwick	£2.3	£15.2	£1.1	£1.3	£0.1	£0.5	£1.5	£3.0	£3.7	£0.4	£29.3
Kenilworth	£1.1	£0.7	£0.1	£0.5	£0.1	£1.6	£22.4	£0.6	£0.2	£0.2	£27.6
Sub Total:	**£68.8**	**£54.5**	**£47.4**	**£37.6**	**£8.3**	**£8.8**	**£44.6**	**£11.0**	**£13.0**	**£10.5**	**£304.6**
OUT OF CENTRE:											
Leamington Shopping Park	£6.2	£5.2	£6.4	£3.2	£0.5	£0.2	£1.1	£0.9	£0.4	£0.6	£24.7
Sainsbury's, Leamington Shopping Par	£0.7	£0.8	£1.9	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£0.3	£4.0
Argos, Leamington Shopping Park	£0.7	£0.8	£0.9	£0.2	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£3.1
Currys, Tachbrook Drive	£2.7	£2.6	£2.4	£1.3	£0.0	£0.2	£0.6	£0.2	£0.4	£0.2	£10.5
Pets at Home, Myton Road	£0.2	£0.4	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£1.1
Homebase, Myton Road	£1.8	£1.4	£1.7	£0.7	£0.0	£0.2	£0.2	£0.4	£0.3	£0.2	£7.0
Homebase, Emscote Road	£0.9	£1.3	£0.5	£0.2	£0.0	£0.1	£0.1	£0.5	£0.2	£0.0	£3.7
Morrisons, Old Warwick Road	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Asda, Chesterton Drive	£1.6	£0.4	£5.5	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£9.2
Tesco, Emscote Road, Warwick	£0.4	£1.6	£0.5	£0.0	£0.0	£0.0	£0.4	£0.5	£0.8	£0.4	£4.6
Sainsbury's, Saltisford, Warwick	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.7	£0.0	£1.5
Other Edge/ Out-of-Centre	£1.1	£0.6	£0.2	£0.3	£0.1	£0.0	£0.1	£0.1	£0.3	£0.0	£2.8
Sub Total:	**£16.3**	**£15.8**	**£20.4**	**£7.9**	**£0.7**	**£0.7**	**£2.7**	**£2.8**	**£3.7**	**£1.7**	**£72.7**
All Other WDC Centres/Stores	£0.9	£1.7	£0.3	£0.3	£0.1	£0.2	£0.5	£0.7	£0.2	£0.2	£5.1
RETAINED BY WDC STORES:	**£86.0**	**£72.0**	**£68.1**	**£45.8**	**£9.1**	**£9.7**	**£47.8**	**£14.5**	**£16.9**	**£12.4**	**£382.4**
OTHER CENTRES AND STORES OUTSIDE DISTRICT											
Banbury	£0.0	£0.2	£0.8	£11.9	£0.3	£0.1	£0.0	£0.1	£0.4	£4.7	£18.5
Birmingham	£0.6	£1.7	£0.7	£0.0	£1.1	£2.9	£0.7	£4.8	£1.0	£1.0	£14.4
Coventry	£8.8	£6.9	£5.5	£4.8	£36.2	£79.8	£17.3	£1.8	£3.0	£1.1	£165.1
Rugby	£0.3	£0.0	£0.2	£6.7	£14.6	£0.0	£0.0	£0.1	£0.0	£0.0	£22.0
Solihull	£2.6	£5.1	£1.7	£2.1	£1.6	£5.1	£7.0	£49.3	£7.6	£2.1	£84.3
Stratford-upon-Avon	£1.5	£7.3	£1.7	£2.3	£0.1	£0.3	£2.0	£6.7	£67.7	£44.5	£134.0
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
All other shops and stores	£2.4	£2.5	£1.8	£12.3	£4.1	£5.3	£2.8	£20.2	£8.9	£7.7	£68.0
Sub Total:	**£16.2**	**£23.7**	**£12.3**	**£40.1**	**£58.0**	**£93.5**	**£29.8**	**£83.1**	**£88.7**	**£61.1**	**£506.4**
TOTAL:	**£102.3**	**£95.7**	**£80.4**	**£85.9**	**£67.1**	**£103.2**	**£77.6**	**£97.6**	**£105.7**	**£73.5**	**£888.7**

WARWICK DISTRICT COUNCIL

RETAIL AND LEISURE STUDY UPDATE 2014

Comparison Goods Capacity Assessment

TABLE 6: 2018 MARKET SHARE ANALYSIS (£m)

	1	2	3	4	5	6	7	8	9	10	TOTAL
AVAILABLE EXPENDITURE (£m):	**£117.7**	**£110.8**	**£96.1**	**£99.9**	**£78.5**	**£118.5**	**£86.9**	**£109.3**	**£122.0**	**£85.1**	**£1,024.8**
TOWN CENTRES:											
Royal Leamington Spa	£75.2	£44.6	£55.2	£41.6	£9.6	£7.7	£23.2	£8.3	£10.5	£11.5	£287.2
Warwick	£2.7	£17.6	£1.4	£1.6	£0.1	£0.6	£1.7	£3.3	£4.3	£0.4	£33.8
Kenilworth	£1.3	£0.8	£0.1	£0.6	£0.1	£1.8	£25.1	£0.7	£0.2	£0.3	£31.1
Sub Total:	**£79.2**	**£63.1**	**£56.7**	**£43.7**	**£9.8**	**£10.1**	**£50.0**	**£12.3**	**£15.0**	**£12.2**	**£352.1**
OUT OF CENTRE:											
Leamington Shopping Park	£7.1	£6.1	£7.6	£3.7	£0.6	£0.2	£1.3	£1.0	£0.4	£0.7	£28.7
Sainsbury's, Leamington Shopping Par	£0.9	£1.0	£2.3	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£0.3	£4.7
Argos, Leamington Shopping Park	£0.8	£1.0	£1.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£3.7
Currys, Tachbrook Drive	£3.1	£3.0	£2.9	£1.5	£0.0	£0.2	£0.7	£0.2	£0.4	£0.2	£12.2
Pets at Home, Myton Road	£0.2	£0.5	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£1.3
Homebase, Myton Road	£2.1	£1.6	£2.0	£0.9	£0.0	£0.2	£0.3	£0.5	£0.4	£0.2	£8.2
Homebase, Emscote Road	£1.0	£1.5	£0.6	£0.3	£0.0	£0.1	£0.1	£0.5	£0.3	£0.0	£4.3
Morrisons, Old Warwick Road	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3
Asda, Chesterton Drive	£1.8	£0.5	£6.6	£1.9	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£10.9
Tesco, Emscote Road, Warwick	£0.5	£1.9	£0.6	£0.0	£0.0	£0.0	£0.5	£0.6	£0.9	£0.4	£5.3
Sainsbury's, Saltisford, Warwick	£0.0	£0.7	£0.0	£0.1	£0.0	£0.0	£0.0	£0.2	£0.8	£0.0	£1.7
Other Edge/ Out-of-Centre	£1.2	£0.7	£0.3	£0.4	£0.2	£0.0	£0.2	£0.1	£0.3	£0.0	£3.3
Sub Total:	**£18.8**	**£18.3**	**£24.4**	**£9.2**	**£0.8**	**£0.8**	**£3.0**	**£3.1**	**£4.2**	**£2.0**	**£84.7**
All Other WDC Centres/Stores	£1.0	£2.0	£0.4	£0.3	£0.1	£0.2	£0.5	£0.8	£0.3	£0.2	£5.8
RETAINED BY WDC STORES:	**£99.0**	**£83.4**	**£81.4**	**£53.3**	**£10.7**	**£11.1**	**£53.5**	**£16.3**	**£19.5**	**£14.4**	**£442.6**
OTHER CENTRES AND STORES OUTSIDE DISTRICT											
Banbury	£0.0	£0.2	£1.0	£13.8	£0.4	£0.1	£0.0	£0.1	£0.5	£5.5	£21.5
Birmingham	£0.7	£2.0	£0.8	£0.0	£1.3	£3.3	£0.8	£5.4	£1.2	£1.1	£16.5
Coventry	£10.1	£8.0	£6.5	£5.6	£42.4	£91.6	£19.3	£2.0	£3.5	£1.3	£190.3
Rugby	£0.4	£0.0	£0.3	£7.8	£17.1	£0.0	£0.0	£0.1	£0.1	£0.0	£25.7
Solihull	£3.0	£5.9	£2.0	£2.5	£1.8	£5.9	£7.9	£55.3	£8.8	£2.4	£95.4
Stratford-upon-Avon	£1.7	£8.5	£2.0	£2.7	£0.1	£0.4	£2.2	£7.6	£78.2	£51.5	£154.7
	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
All other shops and stores	£2.8	£2.8	£2.1	£14.3	£4.8	£6.1	£3.1	£22.7	£10.3	£9.0	£78.0
Sub Total:	**£18.7**	**£27.4**	**£14.7**	**£46.6**	**£67.8**	**£107.3**	**£33.4**	**£93.0**	**£102.5**	**£70.7**	**£582.2**
TOTAL:	**£117.7**	**£110.8**	**£96.1**	**£99.9**	**£78.5**	**£118.5**	**£86.9**	**£109.3**	**£122.0**	**£85.1**	**£1,024.8**

TABLE 7: 2023 MARKET SHARE ANALYSIS (£m)

	1	2	3	4	5	6	7	8	9	10	TOTAL
AVAILABLE EXPENDITURE (£m):	**£139.1**	**£131.6**	**£117.1**	**£119.3**	**£93.7**	**£140.4**	**£100.7**	**£127.0**	**£145.2**	**£101.1**	**£1,215.3**
TOWN CENTRES:											
Royal Leamington Spa	£88.9	£53.0	£67.2	£49.6	£11.4	£9.2	£26.9	£9.6	£12.5	£13.6	£341.8
Warwick	£3.2	£21.0	£1.7	£1.9	£0.1	£0.7	£2.0	£3.9	£5.2	£0.5	£40.0
Kenilworth	£1.6	£1.0	£0.1	£0.7	£0.2	£2.1	£29.1	£0.8	£0.3	£0.3	£36.2
Sub Total:	**£93.6**	**£74.9**	**£69.0**	**£52.2**	**£11.7**	**£12.0**	**£58.0**	**£14.3**	**£17.9**	**£14.5**	**£418.1**
OUT OF CENTRE:											
Leamington Shopping Park	£8.4	£7.2	£9.3	£4.5	£0.7	£0.3	£1.5	£1.1	£0.5	£0.8	£34.3
Sainsbury's, Leamington Shopping Par	£1.0	£1.2	£2.8	£0.2	£0.0	£0.0	£0.0	£0.1	£0.1	£0.4	£5.7
Argos, Leamington Shopping Park	£0.9	£1.1	£1.4	£0.2	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£4.4
Currys, Tachbrook Drive	£3.6	£3.6	£3.5	£1.8	£0.0	£0.2	£0.8	£0.3	£0.5	£0.2	£14.6
Pets at Home, Myton Road	£0.3	£0.6	£0.3	£0.2	£0.1	£0.0	£0.0	£0.0	£0.1	£0.1	£1.6
Homebase, Myton Road	£2.5	£1.9	£2.4	£1.0	£0.0	£0.3	£0.3	£0.6	£0.5	£0.2	£9.8
Homebase, Emscote Road	£1.2	£1.8	£0.7	£0.3	£0.0	£0.1	£0.1	£0.6	£0.3	£0.0	£5.1
Morrisons, Old Warwick Road	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4
Asda, Chesterton Drive	£2.2	£0.5	£8.0	£2.3	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£13.1
Tesco, Emscote Road, Warwick	£0.6	£2.2	£0.7	£0.0	£0.0	£0.0	£0.5	£0.7	£1.1	£0.5	£6.3
Sainsbury's, Saltisford, Warwick	£0.0	£0.8	£0.0	£0.1	£0.1	£0.0	£0.0	£0.2	£1.0	£0.0	£2.1
Other Edge/ Out-of-Centre	£1.4	£0.8	£0.3	£0.5	£0.2	£0.0	£0.2	£0.1	£0.4	£0.0	£3.9
Sub Total:	**£22.2**	**£21.8**	**£29.7**	**£11.0**	**£1.0**	**£1.0**	**£3.4**	**£3.6**	**£5.1**	**£2.4**	**£101.1**
All Other WDC Centres/Stores	£1.2	£2.4	£0.4	£0.4	£0.1	£0.2	£0.6	£1.0	£0.3	£0.2	£6.9
RETAINED BY WDC STORES:	**£117.0**	**£99.0**	**£99.1**	**£63.6**	**£12.7**	**£13.2**	**£62.0**	**£18.9**	**£23.3**	**£17.1**	**£526.1**
OTHER CENTRES AND STORES OUTSIDE DISTRICT											
Banbury	£0.0	£0.3	£1.2	£16.5	£0.4	£0.1	£0.0	£0.1	£0.6	£6.5	£25.7
Birmingham	£0.8	£2.3	£0.9	£0.0	£1.5	£3.9	£1.0	£6.2	£1.4	£1.3	£19.5
Coventry	£12.0	£9.5	£8.0	£6.6	£50.6	£108.5	£22.4	£2.3	£4.1	£1.5	£225.6
Rugby	£0.5	£0.0	£0.3	£9.3	£20.4	£0.0	£0.0	£0.1	£0.1	£0.0	£30.7
Solihull	£3.5	£7.0	£2.5	£3.0	£2.2	£7.0	£9.1	£64.2	£10.5	£2.8	£111.8
Stratford-upon-Avon	£2.0	£10.1	£2.4	£3.2	£0.1	£0.4	£2.6	£8.8	£93.0	£61.2	£183.8
All other shops and stores	£3.3	£3.4	£2.6	£17.1	£5.8	£7.2	£3.6	£26.3	£12.2	£10.7	£92.1
Sub Total:	**£22.1**	**£32.6**	**£17.9**	**£55.7**	**£81.0**	**£127.2**	**£38.7**	**£108.1**	**£121.9**	**£84.1**	**£689.2**
TOTAL:	**£139.1**	**£131.6**	**£117.1**	**£119.3**	**£93.7**	**£140.4**	**£100.7**	**£127.0**	**£145.2**	**£101.1**	**£1,215.3**

Comparison Goods Capacity Assessment

TABLE 8: 2029 MARKET SHARE ANALYSIS (£m)

	1	2	3	4	5	6	7	8	9	10	TOTAL
AVAILABLE EXPENDITURE (£m):	**£171.6**	**£163.1**	**£148.3**	**£147.8**	**£116.6**	**£173.0**	**£122.3**	**£153.1**	**£179.5**	**£124.7**	**£1,500.0**
TOWN CENTRES:											
Royal Leamington Spa	£109.7	£65.7	£85.1	£61.5	£14.2	£11.3	£32.6	£11.6	£15.4	£16.8	£423.8
Warwick	£3.9	£26.0	£2.1	£2.3	£0.1	£0.9	£2.4	£4.7	£6.4	£0.6	£49.4
Kenilworth	£1.9	£1.2	£0.2	£0.9	£0.2	£2.6	£35.4	£1.0	£0.3	£0.4	£44.1
Sub Total:	**£115.5**	**£92.9**	**£87.4**	**£64.7**	**£14.5**	**£14.8**	**£70.4**	**£17.3**	**£22.1**	**£17.8**	**£517.4**
OUT OF CENTRE:											
Leamington Shopping Park	£10.4	£8.9	£11.7	£5.5	£0.8	£0.4	£1.8	£1.4	£0.6	£1.0	£42.6
Sainsbury's, Leamington Shopping Par	£1.2	£1.4	£3.5	£0.2	£0.0	£0.0	£0.0	£0.1	£0.1	£0.5	£7.1
Argos, Leamington Shopping Park	£1.2	£1.4	£1.7	£0.3	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£5.4
Currys, Tachbrook Drive	£4.5	£4.4	£4.5	£2.3	£0.0	£0.3	£1.0	£0.3	£0.6	£0.3	£18.1
Pets at Home, Myton Road	£0.4	£0.7	£0.3	£0.2	£0.1	£0.0	£0.0	£0.0	£0.2	£0.1	£2.0
Homebase, Myton Road	£3.1	£2.4	£3.1	£1.3	£0.0	£0.3	£0.4	£0.7	£0.6	£0.3	£12.1
Homebase, Emscote Road	£1.5	£2.2	£0.9	£0.4	£0.0	£0.1	£0.1	£0.7	£0.4	£0.0	£6.3
Morrisons, Old Warwick Road	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Asda, Chesterton Drive	£2.7	£0.7	£10.1	£2.8	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£16.5
Tesco, Emscote Road, Warwick	£0.7	£2.8	£0.9	£0.0	£0.0	£0.0	£0.7	£0.8	£1.3	£0.6	£7.8
Sainsbury's, Saltisford, Warwick	£0.0	£1.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.2	£1.2	£0.0	£2.6
Other Edge/ Out-of-Centre	£1.8	£1.0	£0.4	£0.6	£0.2	£0.0	£0.2	£0.2	£0.5	£0.0	£4.8
Sub Total:	**£27.4**	**£27.0**	**£37.6**	**£13.6**	**£1.2**	**£1.2**	**£4.2**	**£4.3**	**£6.2**	**£2.9**	**£125.8**
All Other WDC Centres/Stores	£1.5	£2.9	£0.6	£0.5	£0.1	£0.3	£0.8	£1.2	£0.4	£0.3	£8.5
RETAINED BY WDC STORES:	**£144.4**	**£122.8**	**£125.6**	**£78.8**	**£15.8**	**£16.3**	**£75.4**	**£22.8**	**£28.8**	**£21.0**	**£651.6**
OTHER CENTRES AND STORES OUTSIDE DISTRICT											
Banbury	£0.0	£0.3	£1.5	£20.4	£0.5	£0.2	£0.0	£0.1	£0.8	£8.0	£31.8
Birmingham	£1.0	£2.9	£1.2	£0.0	£1.9	£4.9	£1.2	£7.5	£1.7	£1.6	£23.9
Coventry	£14.8	£11.8	£10.1	£8.2	£62.9	£133.7	£27.2	£2.8	£5.1	£1.9	£278.6
Rugby	£0.6	£0.0	£0.4	£11.5	£25.4	£0.0	£0.0	£0.1	£0.1	£0.0	£38.1
Solihull	£4.4	£8.6	£3.1	£3.7	£2.7	£8.6	£11.1	£77.4	£13.0	£3.5	£136.1
Stratford-upon-Avon	£2.5	£12.5	£3.1	£3.9	£0.1	£0.5	£3.1	£10.6	£115.0	£75.5	£226.7
All other shops and stores	£4.1	£4.2	£3.3	£21.2	£7.2	£8.9	£4.3	£31.8	£15.1	£13.1	£113.1
Sub Total:	**£27.3**	**£40.4**	**£22.7**	**£69.0**	**£100.7**	**£156.7**	**£47.0**	**£130.3**	**£150.7**	**£103.6**	**£848.4**
TOTAL:	**£171.6**	**£163.1**	**£148.3**	**£147.8**	**£116.6**	**£173.0**	**£122.3**	**£153.1**	**£179.5**	**£124.7**	**£1,500.0**

TABLE 9: 2031 MARKET SHARE ANALYSIS (£m)

	1	2	3	4	5	6	7	8	9	10	TOTAL
AVAILABLE EXPENDITURE (£m):	**£181.8**	**£173.6**	**£158.4**	**£156.9**	**£123.9**	**£183.5**	**£128.8**	**£161.3**	**£189.9**	**£132.1**	**£1,590.3**
TOWN CENTRES:											
Royal Leamington Spa	£116.2	£69.9	£90.9	£65.3	£15.1	£12.0	£34.3	£12.3	£16.3	£17.8	£450.0
Warwick	£4.1	£27.6	£2.3	£2.4	£0.1	£1.0	£2.6	£4.9	£6.7	£0.7	£52.5
Kenilworth	£2.0	£1.3	£0.2	£1.0	£0.2	£2.8	£37.2	£1.0	£0.4	£0.4	£46.5
Sub Total:	**£122.4**	**£98.8**	**£93.3**	**£68.7**	**£15.4**	**£15.7**	**£74.1**	**£18.2**	**£23.4**	**£18.9**	**£548.9**
OUT OF CENTRE:											
Leamington Shopping Park	£11.0	£9.5	£12.5	£5.9	£0.9	£0.4	£1.9	£1.4	£0.7	£1.1	£45.3
Sainsbury's, Leamington Shopping Par	£1.3	£1.5	£3.7	£0.2	£0.0	£0.0	£0.0	£0.1	£0.1	£0.5	£7.5
Argos, Leamington Shopping Park	£1.2	£1.5	£1.9	£0.3	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£5.8
Currys, Tachbrook Drive	£4.8	£4.7	£4.8	£2.4	£0.0	£0.3	£1.0	£0.3	£0.7	£0.3	£19.3
Pets at Home, Myton Road	£0.4	£0.8	£0.4	£0.2	£0.1	£0.0	£0.0	£0.0	£0.2	£0.1	£2.1
Homebase, Myton Road	£3.3	£2.6	£3.3	£1.3	£0.0	£0.4	£0.4	£0.7	£0.6	£0.3	£12.9
Homebase, Emscote Road	£1.6	£2.3	£1.0	£0.4	£0.0	£0.1	£0.1	£0.8	£0.4	£0.0	£6.7
Morrisons, Old Warwick Road	£0.0	£0.1	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5
Asda, Chesterton Drive	£2.8	£0.7	£10.8	£3.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.1	£17.6
Tesco, Emscote Road, Warwick	£0.8	£2.9	£1.0	£0.0	£0.0	£0.0	£0.7	£0.8	£1.4	£0.6	£8.3
Sainsbury's, Saltisford, Warwick	£0.0	£1.0	£0.0	£0.1	£0.1	£0.0	£0.0	£0.2	£1.3	£0.0	£2.7
Other Edge/ Out-of-Centre	£1.9	£1.0	£0.4	£0.6	£0.3	£0.0	£0.2	£0.2	£0.5	£0.0	£5.1
Sub Total:	**£29.1**	**£28.7**	**£40.2**	**£14.5**	**£1.3**	**£1.3**	**£4.4**	**£4.6**	**£6.6**	**£3.1**	**£133.7**
All Other WDC Centres/Stores	£1.5	£3.1	£0.6	£0.5	£0.1	£0.3	£0.8	£1.2	£0.4	£0.3	£9.0
RETAINED BY WDC STORES:	**£153.0**	**£130.6**	**£134.1**	**£83.7**	**£16.8**	**£17.3**	**£79.4**	**£24.0**	**£30.4**	**£22.3**	**£691.6**
OTHER CENTRES AND STORES OUTSIDE DISTRICT											
Banbury	£0.0	£0.3	£1.6	£21.7	£0.6	£0.2	£0.0	£0.1	£0.8	£8.5	£33.8
Birmingham	£1.0	£3.1	£1.3	£0.0	£2.0	£5.1	£1.2	£7.9	£1.8	£1.7	£25.3
Coventry	£15.7	£12.6	£10.8	£8.7	£66.9	£141.9	£28.7	£2.9	£5.4	£2.0	£295.5
Rugby	£0.6	£0.0	£0.4	£12.2	£26.9	£0.0	£0.0	£0.2	£0.1	£0.0	£40.5
Solihull	£4.6	£9.2	£3.3	£3.9	£2.9	£9.1	£11.7	£81.6	£13.7	£3.7	£143.8
Stratford-upon-Avon	£2.6	£13.3	£3.3	£4.2	£0.1	£0.6	£3.3	£11.2	£121.6	£80.0	£240.1
All other shops and stores	£4.3	£4.4	£3.5	£22.5	£7.6	£9.4	£4.6	£33.5	£16.0	£13.9	£119.7
Sub Total:	**£28.9**	**£43.0**	**£24.2**	**£73.2**	**£107.1**	**£166.3**	**£49.4**	**£137.3**	**£159.5**	**£109.8**	**£898.7**
TOTAL:	**£181.8**	**£173.6**	**£158.4**	**£156.9**	**£123.9**	**£183.5**	**£128.8**	**£161.3**	**£189.9**	**£132.1**	**£1,590.3**

Comparison Goods Capacity Assessment

TABLE 10: TOTAL EXPENDITURE DRAWN BY ALL WARWICK DISTRICT'S CENTRES & STORES FROM WITHIN STUDY AREA (£m)

	2013	2018	2023	2029	2031
ROYAL LEAMINGTON SPA	£247.7	£287.2	£341.8	£423.8	£450.0
WARWICK	£29.3	£33.8	£40.0	£49.4	£52.5
KENILWORTH	£27.6	£31.1	£36.2	£44.1	£46.5
EDGE & OUT OF CENTRE STORES	£72.7	£84.7	£101.1	£125.8	£133.7
ALL OTHER	£5.1	£5.8	£6.9	£8.5	£9.0
DISTRICT AREA TOTAL:	£382.4	£442.6	£526.1	£651.6	£691.6

TABLE 11: TOTAL COMPARISON GOODS TURNOVER OF ALL CENTRES & STORES IN DISTRICT (£m)

	Estimated Trade Draw from Outside Study Area (Zones 1-10)	2013	2018	2023	2029	2031
ROYAL LEAMINGTON SPA	10%	£275.2	£319.1	£379.8	£470.9	£500.0
WARWICK	5%	£30.8	£35.6	£42.1	£52.0	£55.2
KENILWORTH:	5%	£29.1	£32.7	£38.1	£46.4	£48.9
OUT OF TOWN STORES	5%	£76.5	£89.1	£106.4	£132.4	£140.7
ALL OTHER	0%	£5.1	£5.8	£6.9	£8.5	£9.0
DISTRICT AREA TOTAL:		£416.7	£482.4	£573.4	£710.2	£753.8

Source: Trade draw estimates based on survey evidence, previous retail studies and judgement as to the likely trade draw of stores and centres from outside the defined study area (based on location, scale, range and quality of offer compared with competing centres/stores).

TABLE 12: WARWICK DISTRICT - ESTIMATED SALES AREAS & 'BENCHMARK' TURNOVERS

	Estimated Sales Area (sqm net)	Average Sales Density (£ per sqm net)	Estimated 'Benchmark' Turnover (£m)
ROYAL LEAMINGTON SPA TOWN CENTRE:	44,147	£5,500	£242.81
WARWICK TOWN CENTRE:	9,782	£4,500	£44.02
KENILWORTH TOWN CENTRE:	8,669	£4,000	£34.67
OUT OF CENTRE RETAIL FLOORSPACE:	26,007	£3,771	£98.08
WARWICK DISTRICT - TOTAL:	88,605	£4,735	£419.6

Source: Warwick District Council. The local Co-Op convenience store is located on land comprising part of the car park for the Woodloes Tavern (former Sarah Siddons) Public House, Deansway, Woodloes in Warwick (located adjacent to Reardon Court Local Centre).

Notes: The total floorspace figures include an allowance for total vacant space in the District's main centres and the proportion of this vacant space that could potentially be taken up by comparison goods retailers. The total out-of-centre comparison goods floorspace includes the non-food sales areas and turnover of the main foodstore operators.

TABLE 13: COMMITTED &/OR PLANNED RETAIL DEVELOPMENTS - FLOORSPACE & TURNOVER ESTIMATES (£m)

	Estimated Sales Area (m^2 net)	Average Sales Density (£ per m^2)	2013	2018	2023	2029	2031
Co-Op (Land Adjacent to Woodloes Tavern, Warwick)							
Convenience Goods:	250	£7,500	£1.9	£1.9	£2.0	£2.0	£2.0
Comparison Goods:	78	£7,000	£0.5	£0.6	£0.7	£0.7	£0.8
Sainsbury Local (Radford Road, Royal Leamington Spa)							
Convenience Goods:	198	£12,500	£2.5	£2.5	£2.6	£2.7	£2.7
Comparison Goods:	22	£8,500	£0.2	£0.2	£0.2	£0.3	£0.3
TOTAL COMPARISON TURNOVER:	328		£0.7	£0.8	£0.9	£1.0	£1.0

Source: Warwick District Council. The local Co-Op convenience store is located on land comprising part of the car park for the Woodloes Tavern (former Sarah Siddons) Public House, Deansway, Woodloes in Warwick (located adjacent to Reardon Court Local Centre). The Sainsbury's Local store is located at Radford Road (former The Oak public house) .

Notes: Average sales density estimates (£ per sq m) informed by previous retail studies, published information on company average turnovers by Verdict Research and other evidence.

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Comparison Goods Capacity Assessment

TABLE 14: WARWICK DISTRICT - COMPARISON GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO
Assume Constant Market Shares

		2013	2018	2023	2029	2031
STEP 1:	TOTAL 'POTENTIAL' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£ m):	£416.7	£482.4	£573.4	£710.2	£753.8
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£ m):	£419.6	£463.3	£511.5	£576.0	£599.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-£2.9	£19.1	£61.9	£134.2	£154.5
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.7	£0.8	£0.9	£1.0	£1.0
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**	**-£3.6**	**£18.3**	**£61.0**	**£133.2**	**£153.5**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
i	Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,624	£7,314	£8,237	£8,569
ii	**Net Floorspace Capacity (sq m):**	**-604**	**2,763**	**8,341**	**16,175**	**17,912**
iii	Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
iv	Gross Floorspace Capacity (sq m):	-863	3,947	11,916	23,107	25,589

STEP 1: Sets out the estimated turnover of all existing comparison goods floorspace in Warwick District at 2013 based on the survey-derived market share analysis. The forecast growth in turnover over the development plan period (to 2029) assumes constant market shares.

STEP 2: Sets out the total assumed 'benchmark' turnover of existing comparison goods floorspace at 2013 based on Table 12. The forecast growth in all 'benchmark' turnovers over the development plan period has been constrained by an annual floorspace 'productivity' growth based on Experian's latest Retail Planner Briefing Note. In this case an average annual 'productivity' growth of +2.0% has been assumed.

STEP 3: Identifies the forecast residual expenditure capacity available to support new comparison goods floorspace over the forecast period (pre commitments). This is the difference between the 'potential' turnover (Step 1) and 'benchmark' turnover (Step 2) forecasts.

STEP 4: Sets out the forecast comparison goods turnover of all committed floorspace that had planning permission and/or was under construction at the time of preparing this assessment. An allowance has also been made for the growth in 'productivity' of all committed floorspace (as above).

STEP 5: The forecast net residual expenditure available to support new comparison goods floorspace after taking account of all new commitments.

STEP 6: Sets out the forecasts capacity for new comparison goods floorspace (net and gross) over the forecast period. The forecast residual expenditure capacity (£ million) has been converted to a net retail sales area based on an assumed average sales density for all new comparison goods floorspace of circa £6,000 per m^2 in 2013 (2011 prices). This is informed by the published average turnover levels achieved by a range of modern retailers trading in town centre locations. Notwithstanding this, it should be noted that the average sales levels for different retailers will vary due to a range of factors, including location and the scale and quality of the different comparison goods sold.

Comparison Goods Capacity Assessment

TABLE 15: ROYAL LEAMINGTON SPA - COMPARISON GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO
Assume Constant Market Shares

		2013	2018	2023	2029	2031
STEP 1:	TOTAL (SURVEY-DERIVED) 'POTENTIAL' TURNOVER OF LEAMINGTON SPA (£ m):	£275.2	£319.1	£379.8	£470.9	£500.0
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£ m):	£242.8	£268.1	£296.0	£333.3	£346.8
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£32.4	£51.0	£83.8	£137.6	£153.2
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.2	£0.2	£0.2	£0.3	£0.3
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**	**£32.2**	**£50.8**	**£83.6**	**£137.3**	**£152.9**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	i Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,624	£7,314	£8,237	£8,569
	ii **Net Floorspace Capacity (sq m):**	**5,364**	**7,673**	**11,431**	**16,674**	**17,842**
	iii Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	iv Gross Floorspace Capacity (sq m):	7,663	10,962	16,330	23,819	25,489

TABLE 16: WARWICK - COMPARISON GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO
Assume Constant Market Shares

		2013	2018	2023	2029	2031
STEP 1:	TOTAL (SURVEY-DERIVED) 'POTENTIAL' TURNOVER OF LEAMINGTON SPA (£ m):	£30.8	£35.6	£42.1	£52.0	£55.2
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£ m):	£44.0	£48.6	£53.7	£60.4	£62.9
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-£13.2	-£13.0	-£11.5	-£8.4	-£7.6
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.5	£0.6	£0.7	£0.3	£0.3
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**	**-£13.7**	**-£13.6**	**-£12.2**	**-£8.6**	**-£7.9**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	i Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,624	£7,314	£8,237	£8,569
	ii **Net Floorspace Capacity (sq m):**	**-2,286**	**-2,060**	**-1,666**	**-1,049**	**-922**
	iii Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	iv Gross Floorspace Capacity (sq m):	-3,266	-2,943	-2,380	-1,499	-1,317

TABLE 17: KENILWORTH - COMPARISON GOODS CAPACITY ASSESSMENT: BASELINE SCENARIO
Assume Constant Market Shares

		2013	2018	2023	2029	2031
STEP 1:	TOTAL (SURVEY-DERIVED) 'POTENTIAL' TURNOVER OF LEAMINGTON SPA (£ m):	£29.1	£32.7	£38.1	£46.4	£48.9
STEP 2:	TOTAL 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£ m):	£34.7	£38.3	£42.3	£47.6	£49.5
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	-£5.6	-£5.5	-£4.2	-£1.2	-£0.6
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITED FLOORSPACE (£m)	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5:	**NET RESIDUAL EXPENDITURE - AFTER ALL COMMITMENTS (£m):**	**-£5.6**	**-£5.5**	**-£4.2**	**-£1.2**	**-£0.6**
STEP 6:	**FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:**					
	i Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,624	£7,314	£8,237	£8,569
	ii **Net Floorspace Capacity (sq m):**	**-934**	**-838**	**-570**	**-144**	**-69**
	iii Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	iv Gross Floorspace Capacity (sq m):	-1,334	-1,197	-814	-205	-98

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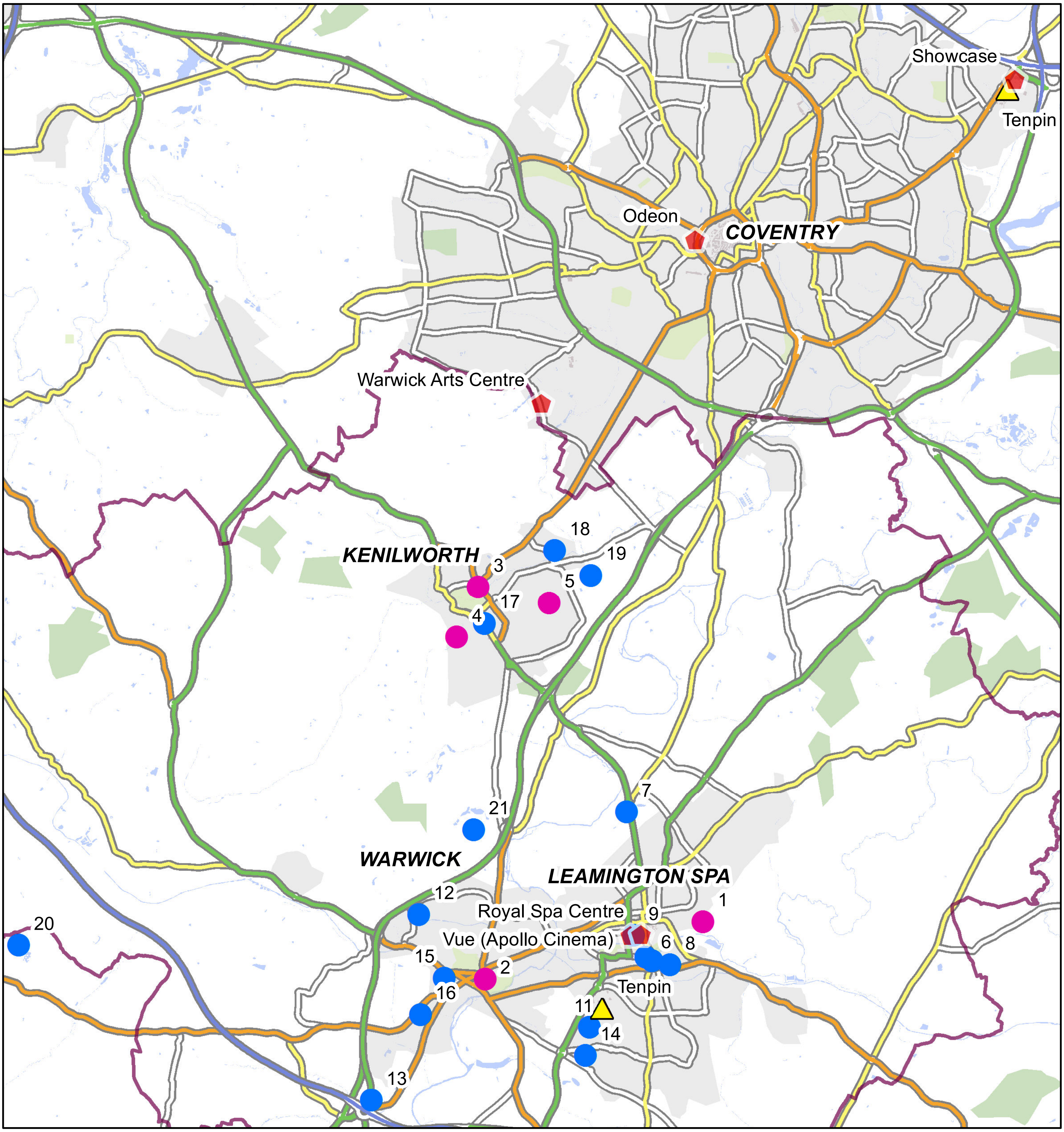
Existing Leisure Facitilities



Legend

- Cinemas_1
- Tenpin Bowling
- Health & Fitness - Public
- Health & Fitness - Private
- Warwick District Council

Health & Fitness Venues:

1. Newbold Comyn Leisure Centre
2. St Nicholas Park Leisure Centre
3. Abbey Fields Swimming Pool
4. Castle Farm Recreation Centre
5. Meadow Sports Centre
6. Bizz Fitness
7. Leamington Spa Rugby Club
8. Pinx Gym
9. Pure Health Club
10. The Workout Mill Gym
11. Urban Sports Fitness Gym
12 .LA Fitness
13. Living Well Fitness
14. Nuffield Health & Fitness
15. The Studio
16. Warwick Sports Club
17. Curve's Women's Gym
18. Curve's Women's Gym
19. Kenilworth Golf Club
20. Ardencote Manor Leisure Club
21. Warwick Health & Country Club

TABLE 1: POPULATION PROJECTIONS BY ZONE

	2013	2018	2023	2029	2031
Zone 1	35,689	37,290	38,771	40,575	41,094
Zone 2	31,692	33,312	34,803	36,603	37,232
Zone 3	31,356	34,055	36,471	39,188	40,014
Zone 4	28,704	30,303	31,837	33,469	33,955
Zone 5	27,403	29,122	30,583	32,271	32,788
Zone 6	41,696	43,461	45,287	47,359	48,022
Zone 7	24,694	25,116	25,602	26,391	26,557
Zone 8	27,576	28,040	28,656	29,315	29,522
Zone 9	33,683	35,310	36,963	38,759	39,200
Zone 10	21,025	22,108	23,110	24,169	24,481
STUDY AREA - TOTAL:	**303,518**	**318,117**	**332,083**	**348,099**	**352,865**
CORE EAST (LEAMINGTON) - Zones 1 & 3	67,045	71,345	75,242	79,763	81,108
CORE WEST (WARWICK) - Zone 2	31,692	33,312	34,803	36,603	37,232
KENILWORTH - Zone 7	24,694	25,116	25,602	26,391	26,557
CORE ZONES - SUB TOTAL:	**123,431**	**129,773**	**135,647**	**142,757**	**144,897**

Source: *Population projections from Experian*

TABLE 2: TOTAL LEISURE EXPENDITURE GROWTH 2011-2029 (%)

	2011	2012	2013	2014	2015	2016-20	2021-29
Expenditure growth per head (%)	1.3	-0.9	-0.2	0.7	1.4	1.5	1.3

Source: Average spend per capita estimates for each zone are derived from Experian *'Retail Area Planner' Reports*.

Notes: Annual expenditure growth forecasts are informed by Experian's *Retail Planner Briefing Note 11 (October 2013).*

TABLE 3: COMMERCIAL LEISURE EXPENDITURE PER HEAD BY ZONE (£)

	2013	2018	2023	2029	2031
Zone 1	£1,912	£2,041	£2,186	£2,362	£2,424
Zone 2	£1,887	£2,015	£2,158	£2,332	£2,393
Zone 3	£1,716	£1,832	£1,962	£2,120	£2,175
Zone 4	£1,789	£1,910	£2,045	£2,210	£2,268
Zone 5	£1,493	£1,595	£1,708	£1,845	£1,894
Zone 6	£1,543	£1,648	£1,764	£1,907	£1,956
Zone 7	£1,990	£2,124	£2,275	£2,458	£2,523
Zone 8	£2,274	£2,428	£2,600	£2,810	£2,883
Zone 9	£1,977	£2,111	£2,261	£2,443	£2,507
Zone 10	£2,177	£2,324	£2,489	£2,689	£2,760
STUDY AREA - TOTAL:	**£1,876**	**£2,003**	**£2,145**	**£2,318**	**£2,378**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1 & 3	£1,814	£1,936	£2,074	£2,241	£2,299
CORE WEST (WARWICK) - Zone 2	£1,887	£2,015	£2,158	£2,332	£2,393
KENILWORTH - Zone 7	£1,990	£2,124	£2,275	£2,458	£2,523
CORE ZONES - SUB TOTAL:	**£1,897**	**£2,025**	**£2,169**	**£2,344**	**£2,405**

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.

Notes: Commercial leisure expenditure includes spend on cultural services, eating and drinking, sports/health, and games of chance.

TABLE 4: TOTAL COMMERCIAL LEISURE EXPENDITURE BY ZONE (£M)

	2013	2018	2023	2029	2031
Zone 1	£68.2	£76.1	£84.7	£95.8	£99.6
Zone 2	£59.8	£67.1	£75.1	£85.4	£89.1
Zone 3	£53.8	£62.4	£71.5	£83.1	£87.0
Zone 4	£51.3	£57.9	£65.1	£74.0	£77.0
Zone 5	£40.9	£46.4	£52.2	£59.5	£62.1
Zone 6	£64.3	£71.6	£79.9	£90.3	£94.0
Zone 7	£49.1	£53.4	£58.2	£64.9	£67.0
Zone 8	£62.7	£68.1	£74.5	£82.4	£85.1
Zone 9	£66.6	£74.5	£83.6	£94.7	£98.3
Zone 10	£45.8	£51.4	£57.5	£65.0	£67.6
STUDY AREA - TOTAL:	**£562.6**	**£628.9**	**£702.5**	**£795.0**	**£826.7**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1 & 3	£122.0	£138.5	£156.3	£178.9	£186.6
CORE WEST (WARWICK) - Zone 2	£59.8	£67.1	£75.1	£85.4	£89.1
KENILWORTH - Zone 7	£49.1	£53.4	£58.2	£64.9	£67.0
CORE ZONES - SUB TOTAL:	**£231.0**	**£259.0**	**£289.6**	**£329.1**	**£342.7**

Source: Expenditure calculated from Tables 1 and 3.

TABLE 5: EATING AND DRINKING OUT EXPENDITURE PER HEAD BY ZONE (£)

	2013	2018	2023	2029	2031
Zone 1	£1,222	£1,305	£1,397	£1,510	£1,549
Zone 2	£1,187	£1,267	£1,357	£1,466	£1,505
Zone 3	£1,098	£1,173	£1,256	£1,357	£1,393
Zone 4	£1,085	£1,159	£1,241	£1,341	£1,376
Zone 5	£912	£973	£1,042	£1,126	£1,156
Zone 6	£968	£1,034	£1,107	£1,196	£1,228
Zone 7	£1,242	£1,327	£1,421	£1,535	£1,575
Zone 8	£1,411	£1,507	£1,613	£1,743	£1,789
Zone 9	£1,211	£1,293	£1,385	£1,497	£1,536
Zone 10	£1,325	£1,334	£1,353	£1,637	£1,394
STUDY AREA - TOTAL:	**£1,166**	**£1,174**	**£1,191**	**£1,441**	**£1,227**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1 & 3	£1,160.1	£1,168.2	£1,184.5	£1,433.4	£1,220.3
CORE WEST (WARWICK) - Zone 2	£1,186.7	£1,195.0	£1,211.7	£1,466.3	£1,248.4
KENILWORTH - Zone 7	£1,242.4	£1,251.1	£1,268.6	£1,535.2	£1,307.0
CORE ZONES - SUB TOTAL:	**£1,196**	**£1,205**	**£1,222**	**£1,478**	**£1,259**

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.

TABLE 6: TOTAL EATING AND DRINKING OUT EXPENDITURE BY ZONE (£M)

	2013	2018	2023	2029	2031
Zone 1	£43.6	£48.6	£54.2	£61.3	£63.7
Zone 2	£37.6	£42.2	£47.2	£53.7	£56.0
Zone 3	£34.4	£39.9	£45.8	£53.2	£55.7
Zone 4	£31.1	£35.1	£39.5	£44.9	£46.7
Zone 5	£25.0	£28.3	£31.9	£36.4	£37.9
Zone 6	£40.4	£44.9	£50.1	£56.7	£59.0
Zone 7	£30.7	£33.3	£36.4	£40.5	£41.8
Zone 8	£38.9	£42.2	£46.2	£51.1	£52.8
Zone 9	£40.8	£45.7	£51.2	£58.0	£60.2
Zone 10	£27.9	£31.3	£35.0	£39.6	£41.1
STUDY AREA - TOTAL:	**£350.4**	**£391.7**	**£437.5**	**£495.2**	**£515.0**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1 & 3	£78.0	£88.6	£100.0	£114.4	£119.4
CORE WEST (WARWICK) - Zone 2	£37.6	£42.2	£47.2	£53.7	£56.0
KENILWORTH - Zone 7	£30.7	£33.3	£36.4	£40.5	£41.8
CORE ZONES - SUB TOTAL:	**£146.3**	**£164.1**	**£183.6**	**£208.6**	**£217.2**

Source: Calculated from Table 1 and 5.
Notes: Core zones comprise the District's three main centres and environs including Royal Leamington Spa (Zones 1 & 3), Warwick (Zone 2), & Kenilworth (Zone 7).

TABLE 7: EATING AND DRINKING OUT FLOORSPACE (M^2 GROSS)

	Restaurants	Cafes	Fast Food	Bars & Wine Bars	Public houses	Disco, Nightclubs, etc	Total Eating & Drinking Out
Royal Leamington Spa	9,030	1,867	2,583	1,830	4,784	1,282	21,377
Warwick	3,261	1,329	687	836	2,044	-	8,157
Kenilworth	1,988	678	334	632	715	65	4,413
TOTAL	14,279	3,874	3,605	3,298	7,544	1,347	33,946

Source: Floorspace derived from Experian Goad Centre Category Reports for Royal Leamington Spa (December 2012), Warwick (February 2013), & Kenilworth (January 2012).

TABLE 8: GAMES OF CHANCE FLOORSPACE (M^2 GROSS)

	Bingo/Amusements		Casinos/betting offices		Total Game of Chance Provision	
	Outlets	m^2	Outlets	m^2	Outlets	m^2
Royal Leamington Spa	1	260	5	855	6	1,115
Warwick	-	-	3	297	3	297
Kenilworth	-	-	1	56	1	56
TOTAL	1	260	9	1,208	10	1,468

Source: Floorspace derived from Experian Goad Centre Category Reports for Royal Leamington Spa (December 2012), Warwick (February 2013), & Kenilworth (January 2012).

TABLE 9: GAMES OF CHANCE EXPENDITURE PER HEAD BY ZONE (£)

	2013	2018	2023	2029	2031
Zone 1	£163	£174	£187	£202	£207
Zone 2	£183	£195	£209	£226	£232
Zone 3	£165	£177	£189	£204	£210
Zone 4	£173	£185	£198	£214	£220
Zone 5	£180	£192	£205	£222	£228
Zone 6	£158	£169	£181	£196	£201
Zone 7	£187	£199	£213	£231	£237
Zone 8	£189	£202	£216	£234	£240
Zone 9	£203	£217	£232	£251	£258
Zone 10	£205	£219	£235	£254	£260
STUDY AREA - TOTAL:	**£181**	**£193**	**£207**	**£223**	**£229**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1 & 3	£164	£175	£188	£203	£208
CORE WEST (WARWICK) - Zone 2	£183	£195	£209	£226	£232
KENILWORTH - Zone 7	£187	£199	£213	£231	£237
CORE ZONES - SUB TOTAL:	**£178**	**£190**	**£203**	**£220**	**£226**

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.
Notes: Core zones comprise the District's three main centres and environs including Royal Leamington Spa (Zones 1 & 3), Warwick (Zone 2), & Kenilworth (Zone 7).

TABLE 10: TOTAL GAMES OF CHANCE EXPENDITURE BY ZONE (£M)

	2013	2018	2023	2029	2031
Zone 1	£5.8	£6.5	£7.2	£8.2	£8.5
Zone 2	£5.8	£6.5	£7.3	£8.3	£8.6
Zone 3	£5.2	£6.0	£6.9	£8.0	£8.4
Zone 4	£5.0	£5.6	£6.3	£7.2	£7.5
Zone 5	£4.9	£5.6	£6.3	£7.2	£7.5
Zone 6	£6.6	£7.3	£8.2	£9.3	£9.6
Zone 7	£4.6	£5.0	£5.5	£6.1	£6.3
Zone 8	£5.2	£5.7	£6.2	£6.8	£7.1
Zone 9	£6.8	£7.7	£8.6	£9.7	£10.1
Zone 10	£4.3	£4.8	£5.4	£6.1	£6.4
STUDY AREA - TOTAL:	**£54.3**	**£60.7**	**£67.9**	**£76.8**	**£79.9**
CORE EAST (ROYAL LEAMINGTON SPA) - Zones 1 & 3	£11.0	£12.5	£14.1	£16.2	£16.9
CORE WEST (WARWICK) - Zone 2	£5.8	£6.5	£7.3	£8.3	£8.6
KENILWORTH - Zone 7	£4.6	£5.0	£5.5	£6.1	£6.3
CORE ZONES - SUB TOTAL:	**£21.4**	**£24.0**	**£26.9**	**£30.5**	**£31.8**

Source: Experian Business Strategies *'Retail Area Planner'* Report for each study zone.
Notes: Core zones comprise the District's three main centres and environs including Royal Leamington Spa (Zones 1 & 3), Warwick (Zone 2), & Kenilworth (Zone 7).